Dynamics 365 Customer Service documentation

Discover how to make the most of Dynamics 365 Customer Service with training, docs, and videos covering product capabilities and how-to articles. Learn about the suite of capabilities that Customer Service provides and ensure that your business delivers the best customer service experience to your customers.

GET STARTED
Welcome to Dynamics 365 Customer Service

WHAT'S NEW
What's new

TRAINING
Training

CONCEPT
Troubleshoot

Implement

Guidance

- Security and compliance
- Implementation
- Adoption guide

Try/Buy/Provision

- Try Customer Service
- Buy Customer Service
- Provision Omnichannel for Customer Service

Set up

- Set up roles and enable users in Omnichannel for Customer Service
- Set up personas and privileges in Customer Service and Omnichannel for Customer Service
- System requirements for Customer Service workspace

Administer and develop

Configure

Develop

Customize

Provision unified routing for Customer Service

Configure the voice channel

Upgrade Omnichannel for Customer Service

Omnichannel for Customer Service entity reference

Live chat SDK Reference

Develop a custom live chat widget

Customize the case resolution experience

Customize forms for your agents and supervisors

Customize data models of historical and real-time analytics reports

Integrate

Integrate a third-party IVR system with voice channel

Integrate a Power Virtual Agents bot

Integrate knowledge management in Dynamics 365 with Power Virtual Agents bots

Configure AI features

Manage copilot features in Customer Service

Configure copilot features for custom case forms and custom apps

Enable AI suggestions for similar cases and knowledge articles

Add-in solutions

Unified Service Desk

Dynamics 365 Channel Integration Framework

Manage your contact center

Manage cases and solve issues within SLAs

Create cases

Manage cases with case grids

Manage cases using interactive dashboards

Work with SLAs

Communicate over channels that customers prefer

Communicate over multiple channels

Communicate over the voice channel

Transfer calls and consult with users in the voice channel

View the communication panel

Increase productivity and customer satisfaction

Use the productivity pane to resolve customer issues

Use email to interact consistently with customers

Manage conversations and activities on the timeline

Search and use knowledge articles

Use AI capabilities

View AI-suggested similar cases and knowledge articles

Use suggested contacts

Use auto-summarization for ongoing conversations

Get insights and analyze service operations

Use Customer Service dashboards

Use Omnichannel for Customer Service dashboards

Collaborate using Microsoft Teams

Collaborate without switching context

Use Teams meetings

Use customer support swarming to resolve issues

Collaborate with AI-suggested contacts in Microsoft Teams

Use Omnichannel real-time analytics dashboards

Use bookmarks for reports

Customize visual display

Explore your apps

Admins, use Customer Service admin center

Agents, use Customer Service workspace

Team members, use Customer Service Team Member

Related products

Microsoft Power Apps

Learn how to quickly build low-code apps that modernize processes and solve tough business challenges in your...

Microsoft Power Platform

Learn how to quickly and easily build custom apps using Power Apps, automate workflows to improve business productivit...

Azure Communication Services

Build powerful, cloud-based communication and customer engagement experiences by adding voice, video, chat, sm...

Microsoft Power Virtual Agents

Build chatbots easily with Power Virtual Agents.

Digital Contact Center Platform

Learn about Microsoft Digital Contact Center Platform, and how to deploy and configure Nuance IVR and Gatekeeper,...

Welcome to Dynamics 365 Customer Service

Article • 08/09/2023

Tip

- If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.
- Explore **Copilot**, a feature that significantly enhances agent productivity in Customer Service.

Welcome to Dynamics 365 Customer Service! We're delighted to offer you a suite of capabilities to ensure your business can deliver the best customer service experience possible to your customers. We believe that knowing your customers enables you to personalize each experience and optimizes your agents' productivity so you can earn customers for life.

The agent experience is the heart of Dynamics 365 Customer Service. The key to improving satisfaction in service delivery is enabling agents to take customer requests from any channel, handle multiple sessions at a time, interact with multiple apps without losing context, and enhance their workflow with productivity tools.

We offer several app experiences for you to choose from, depending on your support organization's needs.

Use Customer Service to:

- Track customer issues through cases
- Record all interactions related to a case
- Share information in the knowledge base
- Use unified routing to efficiently route work items
- Manage conversations across channels, including voice
- Use AI-driven embedded insights and analytics to improve customer satisfaction
- Collaborate with experts in Microsoft Teams
- Create and track service levels through service-level agreements (SLAs)
- Define service terms through entitlements
- Manage performance and productivity through reports and dashboards
- Create and schedule services
- Participate in chats

Administer Customer Service

You can configure and manage the different capabilities in Customer Service by using any of the following apps based on the licensing module that you've purchased. While you can use any of the admin apps to set up the features in Customer Service, we recommend that you use the latest apps and centrally manage the features in a robust framework.

- **Customer Service admin center**: Use the app to manage the different features of Customer Service in one place. You can configure all the features of the customer support, operations, and agent experiences through the new app. You can manage core customer service and other features, such as service terms, service scheduling, and all the channels in Omnichannel for Customer Service. More information: Customer Service admin center at a glance

  > **Important**
  >
  > With the release of the Customer Service admin center app that consolidates admin experiences across the Customer Service suite, we announce that the following admin experiences are deprecated and no longer supported after April 2023.
  >
  > - Service Management area in the Customer Service Hub app
  > - Omnichannel admin center
  > - **App profile manager:** Is removed in April 2023.
  >
  > Also, starting in October 2022, the Omnichannel admin center and the service management area in Customer Service Hub will be hidden by default in newly created organizations and environments. You have the option to bring them back, but we recommend that you start using the Customer Service admin center app to perform tasks like manage cases, and configure unified routing, channels, and agent experience profiles. More information: **Get started with Customer Service admin center**

- **Omnichannel admin center** (Deprecated): Helps in managing all your chat and digital messaging channels, including the voice channel.

- **App profile manager** (Deprecated): Helps in creating and managing targeted app experiences for agents and supervisors as an alternative to building and maintaining custom apps. You can create custom profiles with specific session templates, conversation channels, and productivity tools. You can then assign these profiles to agents and supervisors who use the Customer Service workspace app.

These capabilities are available in the new Customer Service admin center app also. We recommend that you use the new app.

- **Omnichannel Administration** (Deprecated): Helps in setting up and managing the chat and digital messaging channels and other features in Omnichannel for Customer Service.

  > ⓘ **Note**
  >
  > Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. For more information about the deprecation announcement, see **Omnichannel Administration app is deprecated and will be removed in July 2023**.

The following table provides the features that can be configured through the admin apps.

Feature	Customer Service admin center	Omnichannel admin center (deprecated)	Customer Service Hub -> Service Management (deprecated)
Basic administration for Customer service	✓	✕	✓
Case routing and queue configuration	✓	✓	✓
Service-level agreements	✓	✕	✓
Service scheduling	✓	✕	✓
Live chat, social channels, Microsoft Teams, SMS	✓	✓	✕
Agent experience profiles	✓	✕	✕
Unified routing	✓	✓	✓
Voice channel	✓	✓	✕
Knowledge management	✓	✕	✓

Feature	Customer Service admin center	Omnichannel admin center (deprecated)	Customer Service Hub -> Service Management (deprecated)
Insights, analytics, and dashboards	✓	✓	✓
Productivity tools	✓	✓	✕

Legend

✓: Generally available.

✕: Not available

Use agent apps to service customers

The following capabilities are available in the different app experiences, depending on your needs. In the following table, select the app of your choice to read more about the details of the user experience in each app.

Features	Customer Service workspace	Omnichannel for Customer Service (Deprecated)	Customer Service Hub	Customer Service Team Member	Customer Service app (Deprecated)
Multisession	✓	✓	✕	✕	✕
Case management	✓	✓	✓	✓	✓
Conversations (with Chat or Digital Messaging Offers)	✓	✓	✕	✕	✕
Channels (with Digital Messaging Offer)	✓	✓	✕	✕	✕
Voice channel (with Voice Channel for Dynamics 365 Customer Service)	✓	✓	✕	✕	✕

Features	Customer Service workspace	Omnichannel for Customer Service (Deprecated)	Customer Service Hub	Customer Service Team Member	Customer Service app (Deprecated)
Knowledge management	✓	✓	✓	Read-only	✓
Insights, analytics, and dashboards	✓	✓	✓	✕	✕
Service scheduling	✓	Not applicable	✓	✕	✓
Connected Service with IoT	✓	✕	✓	✕	✕
Extensibility	✓ with Channel Integration Framework version 2.0, custom messaging channel	✓ with Channel Integration Framework version 2.0, custom messaging channel, Mobile SDK	✓ with Channel Integration Framework version 1.0	✕	✕
Unified Interface compliant	✓	✓	✓	✓	✕

Legend

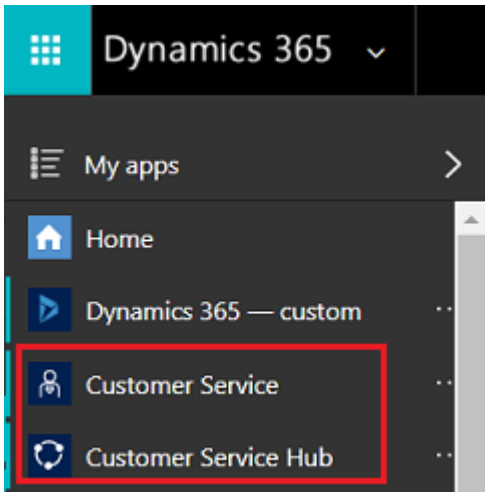
✓: Generally available.

✕: Not available

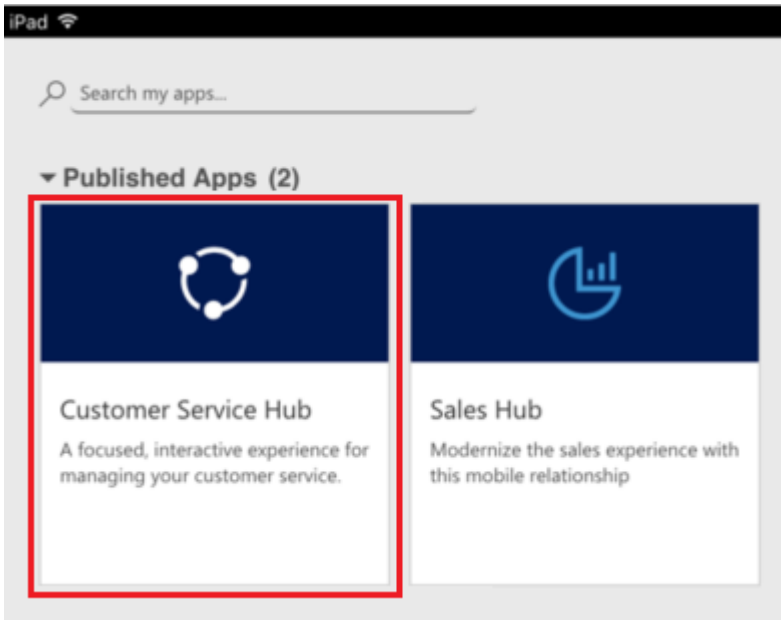
Available anywhere, on any device

> **Note**
>
> For mobile devices, you can install the applicable app for your device. For more information, see **Install Dynamics 365 for phones and tablets**.

If you're using a desktop browser, you'll see the various Customer Service apps in the app switcher as shown here.



If you're using a mobile device with Dynamics 365 for phones and tablets installed, you'll see the app tiles in the app switcher as shown here.



> **Note**
>
> Looking forward to upgrade to the Customer Service Workspace or Customer Service Hub app? See **Upgrade to Customer Service Hub**

> **Note**
>
> If you have previously installed any portal solution, to create a case in the Customer Service Hub or to use the Merge cases command, you must turn off the **Read-only in mobile** option for the Case entity. More information: **Turn off Read-only in mobile option**.

Accessibility and privacy in the Customer Service Apps

Customer Service is committed to inclusive design and accessible content. The apps are designed around accessibility to help all users be effortlessly productive.

For more details about app accessibility and privacy compliance, see Accessibility and privacy.

Get Started with Customer Service

- Customer Service Workspace
- Omnichannel for Customer Service
- Customer Service Hub

Get started with Customer Service workspace

Article • 08/01/2023

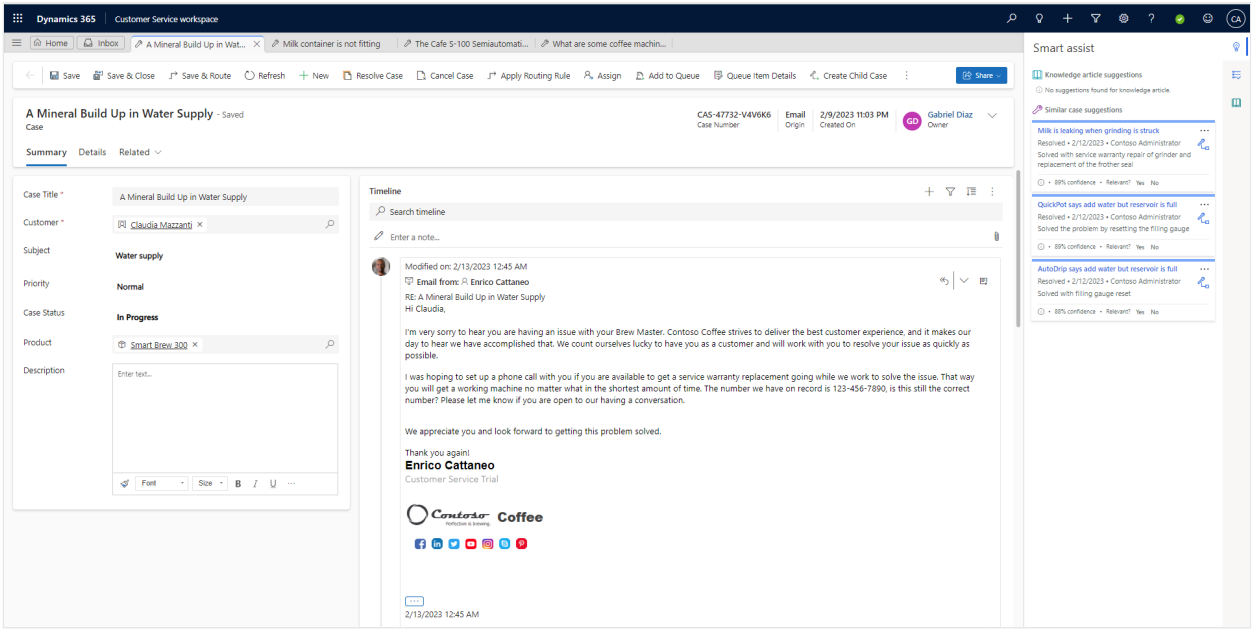
Dynamics 365 Customer Service workspace helps agents increase productivity with a browser-like, tabbed experience. Agents can use the app to work on multiple cases and conversations. It's a modern, customizable, high-productivity application that allows agents to work on multiple sessions at a time in a single workspace.

The application uses artificial intelligence in productivity tools like Smart Assist to identify similar cases and relevant articles, thereby boosting agent productivity. Features such as agent scripts and macros provide agents with guidance and resources to automate repetitive tasks to achieve a great customer experience.

For more information about licensing and system requirements, see Customer Service workspace system requirements

Set up Omnichannel in Customer Service workspace

You can set up your Customer Service workspace environment so that agents who work on cases can also engage with customers via channels like Live Chat, voice, and SMS without leaving the app, by using the Dynamics 365 Customer Service Digital Messaging add-on. More information: Set up Omnichannel for Customer Service channels in Customer Service workspace



Customer Service workspace sessions and tabs

Customer Service workspace allows agents to work on multiple sessions at a time in a single app while keeping the work organized. Agents can work on up to nine sessions and within a session, they can open up to 10 tabs. A new session is launched when an agent opens a case from the **Home** session or accepts an incoming conversation. If the agent opens the customer record from a session, a new tab opens in the same session. Agents can select the hamburger icon to access the site map. When an agent opens a page from the site map, the page loads in the current focused session.

Navigate sessions and tabs

The following table gives an overview of the multisession navigation:

Action	Result
Open a record from the Home session	Record opens in a new session.
Open a record from the Global search	Record opens in a new session.
Open a record from the retrieved search records	Record opens in a focused session.
Open a record using the Quick Create notification	Record opens in a new session
Create a new record	Record opens in a new session
Open a record from the timeline	Record opens in a new tab in the focused session
Open a record from a form lookup	Record opens in a new tab in the focused session
Open a view from the Sitemap	View opens in a new tab in the focused session
Open a dashboard from the Sitemap	Dashboard opens in a new tab in the focused session

Use the Inbox

If your administrator has turned on the inbox for your profile, you can select the **Inbox** tab to view all the cases, conversations, and activities that are assigned to you. Use the inbox to work on high-velocity tasks. You can also promote inbox sessions to regular sessions when you need more time to resolve a case or complete a conversation.

The asynchronous channels available in the conversation inbox are: SMS, persistent chat, Facebook, WeChat, LINE, WhatsApp, and Microsoft Teams.

More information: Configure the inbox view

Use the productivity pane with Smart Assist

When you work on a case, the productivity pane on the right side of the Customer Service workspace displays intelligence-driven suggestions to help you. The productivity pane uses Smart Assist to suggest related cases and knowledge articles that could be relevant. You'll also see agent scripts that guide you through a consistent series of steps with potentially automated actions through macros.

More information: Productivity pane

Work with cases, activities, knowledge articles, and email templates

On the Customer Service Agent Dashboard, here are some of the actions you can do:

- View cases and activities assigned to you
- View cases available to work on
- Create, delete, and filter cases and activities from the workspace

Customize the agent experience with Customer Service admin center

Agent experience profiles enable you to create targeted app experiences for agents and supervisors, and are an alternative to building and maintaining custom apps. With the agent experience profiles, administrators can create custom profiles with specific session templates, conversation channels, and productivity tools. These profiles can then be assigned to users.

More information: Agent experience profiles

Considerations

Here are a few things to note when you use Customer Service workspace in your organization:

- We recommend that you have only one browser instance accessing the app.
- `XRM.Navigation.openForm` and `Xrm.Navigation.navigateTo` APIs have a similar navigation as the multisession app. For example:
  - A new session is initiated if you open a form through `XRM.Navigation.openForm` from Home.

    - A new tab in the focused session is initiated if you open a form through `XRM.Navigation.openForm` from a case session.
- Opening a WebResource through `Xrm.Navigation.openWebResource` opens a new browser window but doesn't remove the navigation and command bars. You can programmatically open web resources as session tabs using the `Microsoft.Apm.createTab` method. More information: createTab method
- You can open sessions and tabs using Microsoft.Apm APIs. More information: App profile manager JavaScript API Reference

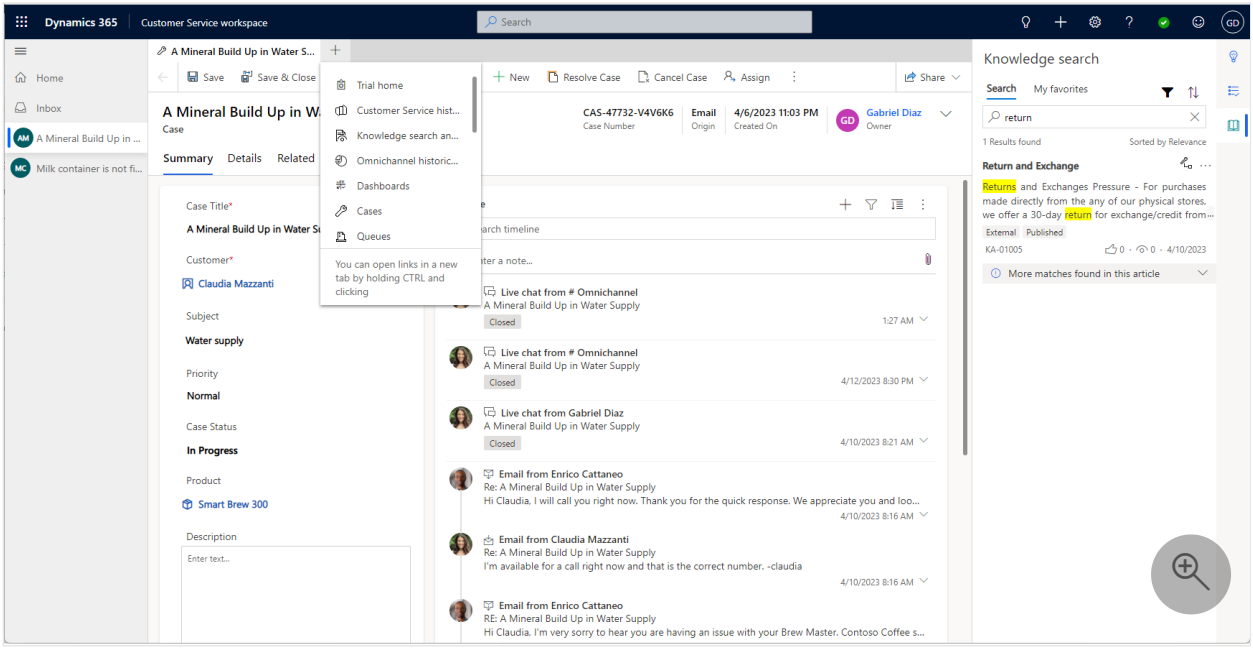
Limitations

The following limitations apply to Customer Service workspace:

- When you switch between tabs or sessions:
    - Subgrid controls don't retain the filter or sort conditions.
    - Web resources, form components, custom pages, and third-party websites don't retain the state of the page.
    - When changing the status record in a tab, the corresponding record open in a grid or subgrid of another tab doesn't refresh automatically.
- Customer Service workspace isn't supported in mobile devices, Unified Service Desk, and with Dynamics 365 Customer Engagement (on-premises).

Deprecated Customer Service workspace layout

The legacy layout has been deprecated and will be removed in October 2023.



Turn on legacy layout (deprecated)

You can enable the legacy layout in one of the following ways:

Customer Service admin center

1. In Customer Service admin center, select **Miscellaneous** in **Operations**.
2. Select **Manage** for **New and upcoming features**.
3. Clear the **Multisession Layout improvements** and then select **Save**.

Turn off the close session dialog

1. With Customer Service workspace open, press the F12 key to open the developer tools window.
2. In the console window, enter the following command:
   `Xrm.Utility.getGlobalContext().saveSettingValue("msdyn_SuppressSessionCloseWarning",true)`
3. Refresh the app page.

Turn on legacy navigation (deprecated)

> **Note**
>
> The legacy navigation is deprecated and will be removed in a future release.

1. With Customer Service workspace open, press the F12 key to open the developer tools window.
2. In the console window, type the following command and press **Enter**:
   `Xrm.Utility.getGlobalContext().saveSettingValue("msdyn_MultisessionNavigationImprovements",false)`
3. Refresh the app page.

See also

Learn about Customer Service workspace in a day
Work with cases in Customer Service Hub
Work with activities in Customer Service Hub
Overview of the productivity pane

View the agent calendar

Migrate from Unified Service Desk to Customer Service workspace

Customer Service Team Member app

Article • 01/30/2023

With the entry-level Team Member license, you can now address self-service support scenarios for your employees using the new Customer Service Team Member app module. Employees can create cases for their problems, such as laptop issues, HR queries, and administrative needs, and interact with agents through the commenting feature. They can also search the knowledge base for solutions pertaining to their problems.

Install Customer Service Team Member app

The Customer Service Team Member app must be manually installed in your instance and the **Customer Service Team Member** role assigned to the users before they can access it.

1. As an administrator, sign in to Power Platform administration center.
2. In the site map, expand **Resources**, and select Dynamics 365 apps.
3. On the apps list page, select the ellipses beside **Customer Service Team Member**, and select **Install**.
4. In the **Install Customer Service Team Member** panel, select an environment from the list.
5. Select the terms of service, and then select **Install**.
6. Grant the **Customer Service Team Member** role to the users who will access the app. To learn about granting the role, see Assign a security role to a user.

Change the default account

You can update the default account that appears for employees when they are creating a case. Perform the steps outlined in this section to update the default account.

> **Important**
>
> Do not modify or update the default account that is available out of the box with the app; instead, deactivate the out-of-the-box account, and configure a new account and set it as the default.

1. In your instance, log on to Customer Service Hub as an administrator, and create an account.

2. Retrieve the account record ID from the URL where you created the account.
3. Go to https://make.powerapps.com, and select **Solutions**.
4. In the **Solutions** list, browse and select **Customer Service Team Member**.
5. On the **Solutions** > **Customer Service Team Member** page, select **Default customer account**. The **Edit Default customer account** dialog box appears.
6. Under **Current value**, select **New value**.
7. In the box that appears, paste the account ID that you had copied in step 2, and select **Save**. The account that you have chosen is set as the default account.

Use the Customer Service Team Member app

In the Customer Service Team Member app, you can perform the following tasks:

- Create cases, read, and update the cases that you created.
- Use the comments feature for your cases to interact with agents.
- Search and view knowledge articles.

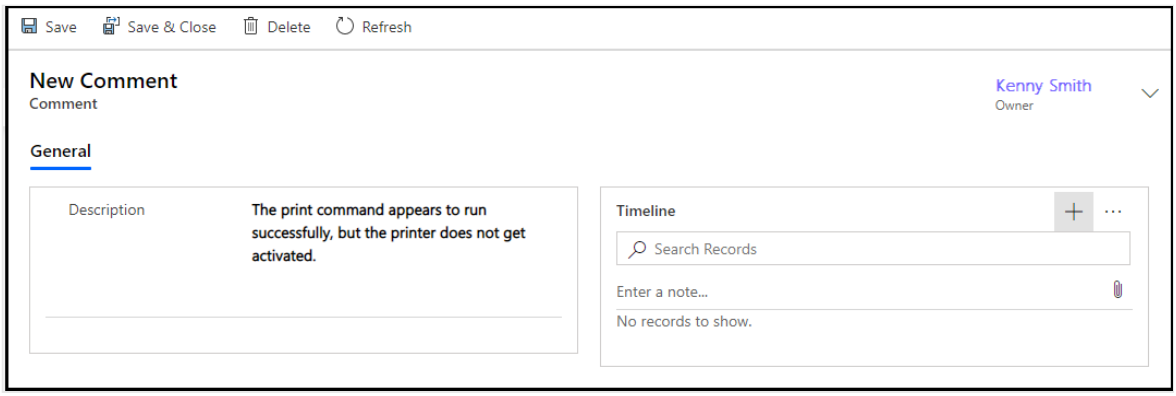
1. Sign in to Dynamics 365, and select **Customer Service Team Member**.
2. Select **Cases**. The **Active Cases created by me** page appears.
3. Select **New Case**. The **New Case** page appears.
4. Enter the following details on the **Summary** tab:

    - **Case Title:** Specify a title.
    - **Subject:** Specify the subject.
    - **Product:** Select the product category.
    - **Description:** Specify a description that summarizes the problem.

    > **Note**
    >
    > The **Customer** value is not available for editing; it is mapped to the "Default account" that is configured by your administrator.

5. Select **Save**. The **Comments** section appears on the page that can be used to provide additional information.
6. Select **New Comment**. The **New Comment** page appears.
7. In **General** > **Description**, enter additional information that would be useful in addressing the problem.

8. Select **Save**. The **Timeline section is enabled where you can add notes and upload files pertaining to the problem.**



9. (Optional.) Select **Enter a note** to add notes and attach files.

10. Select **Save & Close**. The **Active Cases created by me** page appears.

11. Select **Knowledge Search** to search for articles pertaining to your problem area that may help in addressing the issue. To learn more, see Use the direct knowledge base search in Customer Service Hub

    > **Note**
    >
    > "Send article URLs" is not supported in the Customer Service Team Member app.

12. If you want to close a case after it has been resolved, you can select the case on the **Active Cases created by me** page and click **Close Case**. Alternatively, you can close the case on the **My Case** page.

See also

Dynamics 365 Team Members license

Get started with Customer Service admin center

Article • 10/24/2023

Welcome to Customer Service admin center, the app that unifies and simplifies administration experience across the Customer Service suite.

Use the Customer Service admin center app to set up the features in Customer Service, such as unified routing, cases, queues, knowledge articles, channels, rules for automatic record creation, agent experience profiles, and customer service schedules.

The enhancements include:

- Consolidated administration experiences that're currently distributed in three different apps: Customer Service Hub, Omnichannel admin center, and app profile manager.
- Step-by-step guided experience for setting up a channel.
- Search option to easily find the administrator settings for the various features in the app.
- Reorganized and task-oriented site map.
- Overview pages for each area that list at-a-glance information with deep links to manage features.
- Landing pages per feature with an overview of all the capabilities.
- The site map adapts to the capabilities that are provisioned. Based in core Customer Service, if Omnichannel for Customer Service is provisioned, then other features are automatically available.

https://www.microsoft.com/en-us/videoplayer/embed/RE4TYJn?maskLevel=0&postJsllMsg=true

Prerequisites

You'll need one or more of the following security roles to access this app to perform the various configuration tasks:

- **System Administrator**: To access and edit all the site map entries.

- **System Customizer**: To access and edit all the site map entries.
- **CSR Manager**: To access the entities like queues for the email record, automatic record creation and update rules, and workstreams in Customer Service.
- **App Profile Manager administrator and Basic User**: To access the app and edit app profile-related entities.
- **Omnichannel administrator and Basic User**: To access the app and edit all the omnichannel-related entities, like chat and voice and queues, and workstreams.

Also, to create a shared mailbox, you need the Microsoft 365 tenant admin privileges.

If you use custom roles, you must make sure that you have the appropriate permissions corresponding to the feature you want to configure.

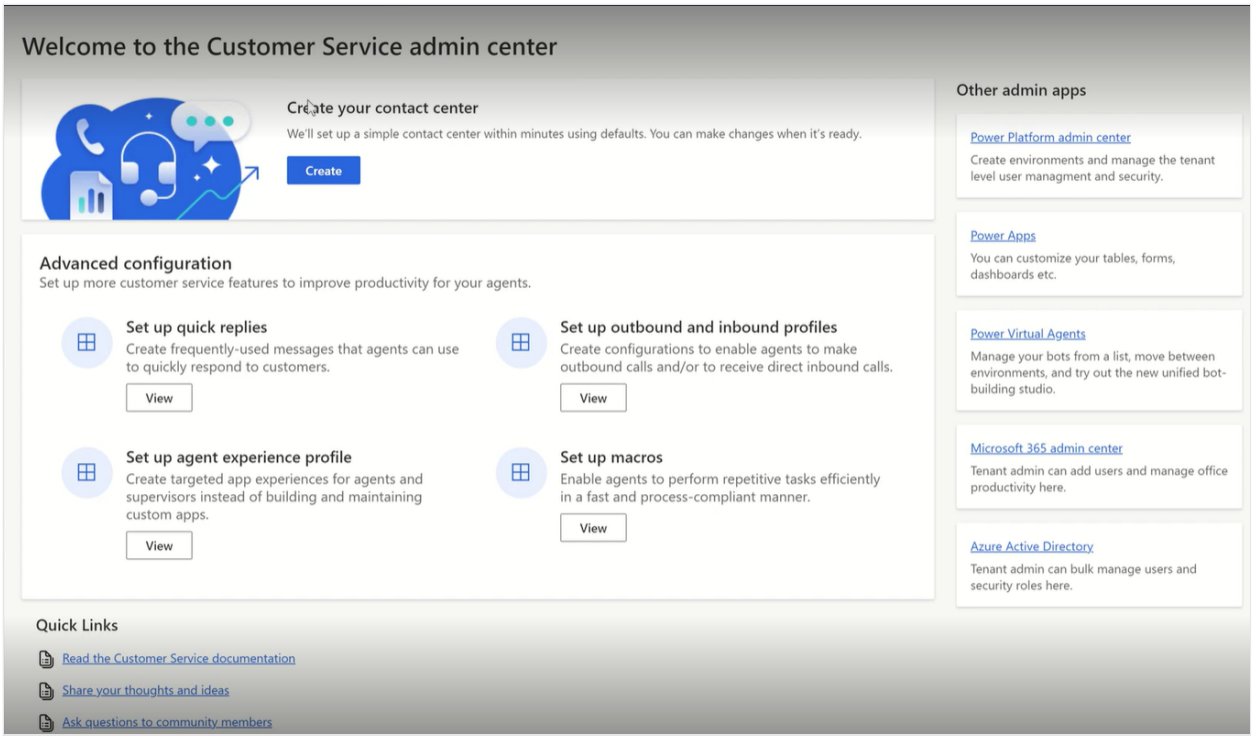
More information: Assign roles and enable users for Omnichannel for Customer Service

Access the app

The app is automatically installed in all the Customer Service organizations. You can sign in to Dynamics 365, and on the apps page, select Customer Service admin center.

Create your contact center

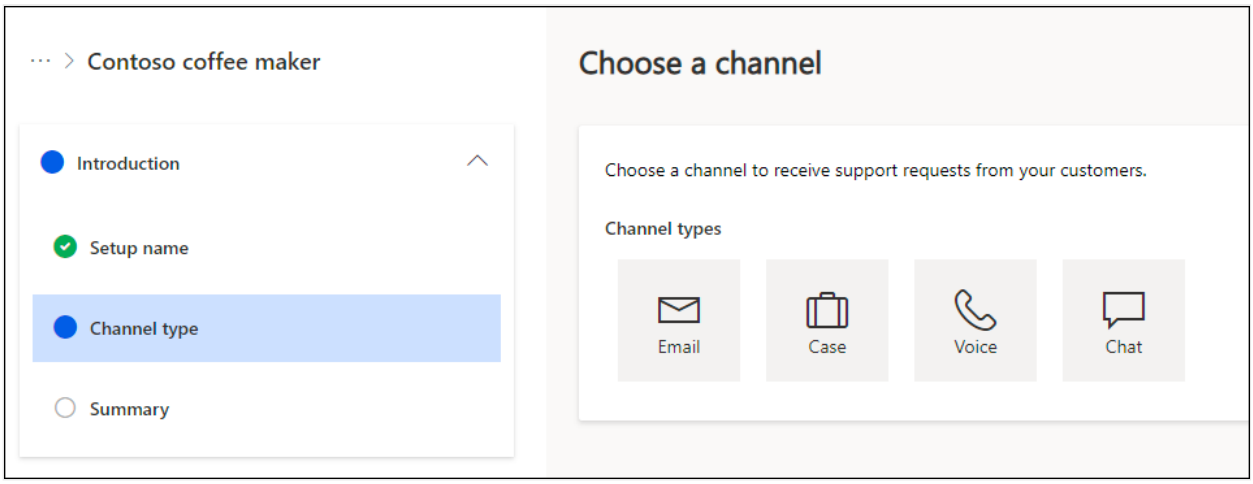
On the **Home** page, use the **Create your contact center** wizard to set up a new contact center with one click. When you select **Create**, the wizard automatically sets up the live chat and voice channels, a default agent experience profile, and the recommended AI features and reports. After the setup is complete, the summary page displays the channels and features that you can try. You can also customize the settings by following the bubble tour, which requires the Omnichannel administrator and Omnichannel agent roles.



> **Note**
>
> The create your contact center feature is available for new organizations only.

Guided channel setup

You can use the guided channel setup wizard to configure channels, such as a channel for routing cases. The wizard helps you create the channel, configure users and permissions, and set up routing rules to get you started with handling customer issues with minimal setup.



> **Important**

To successfully create a guided setup for each channel, you must have full privileges to all the tables used in the setup.

Navigate the site map in Customer Service admin center

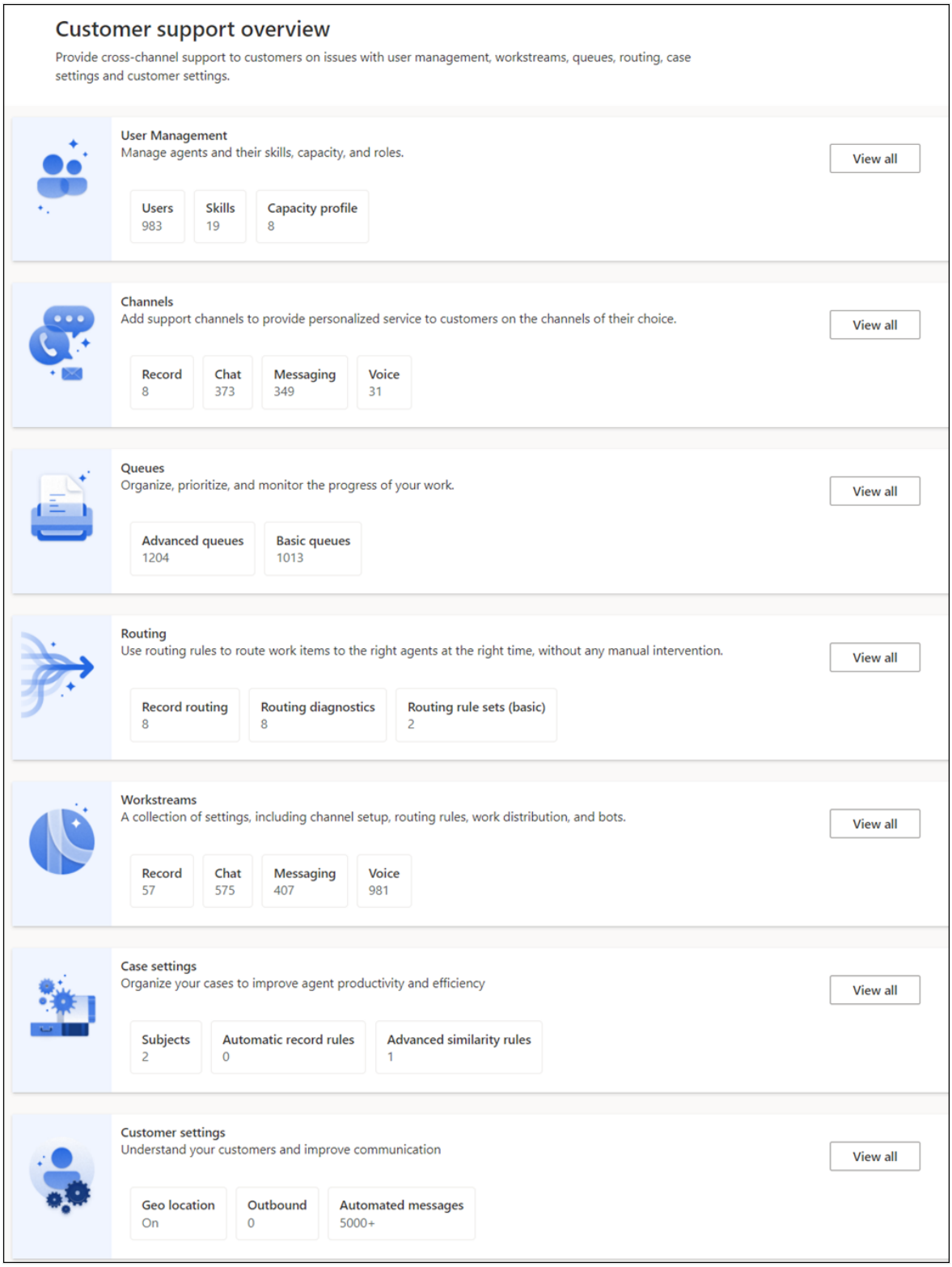
The Customer Service features are organized in the site map as follows. Every group contains an overview page with deep links to the features within the area.

> ⓘ **Note**
>
> The options that appear on the site map are dependent on the features that you have provisioned.

The overview page for every group lists a summary of the objects that are available for each feature. For example, the number of users who are available, and channels and queues that are configured in the organization.

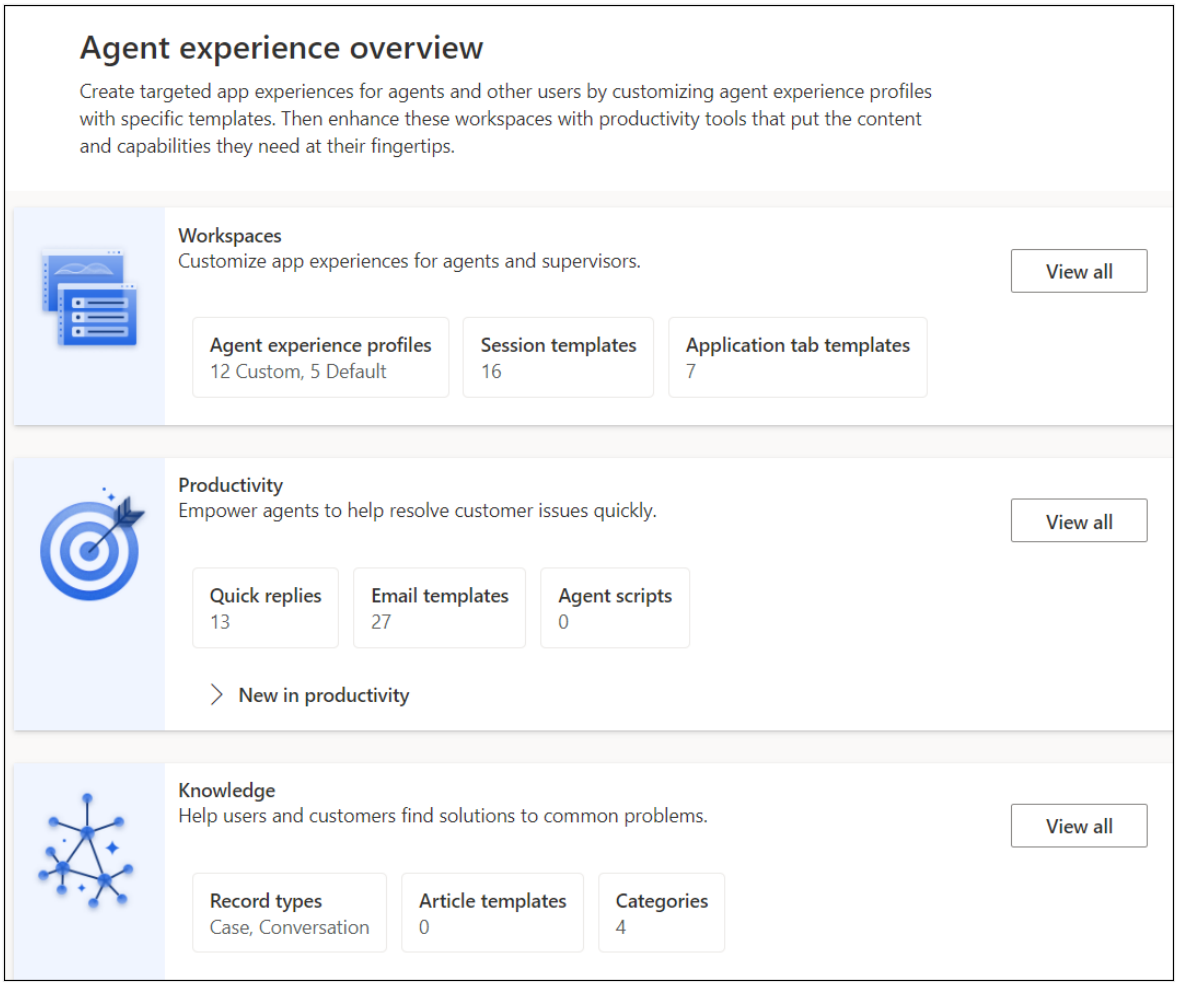
You can manage the following features in **Customer support**:

- **User management**: Users, their skills, capacity profiles, and role persona mapping
- **Channels**: Channels, such as record, chat, and voice, and the messaging accounts and phone numbers.
- **Queues**: Manage basic and advanced queues.
- **Routing**: Settings, such as enable unified routing, configure record routing, routing diagnostics, and machine learning models for skill-based, effort-based, and sentiment-based routing.
- **Workstreams**: Workstreams for the different channels.
- **Case settings**: Subjects, automatic record creation rules, advanced similarity rules, parent-child case settings, and case resolution dialog.
- **Customer settings**: Blocked numbers, authentication settings, geo location, phone music, outbound messaging and automate messages.



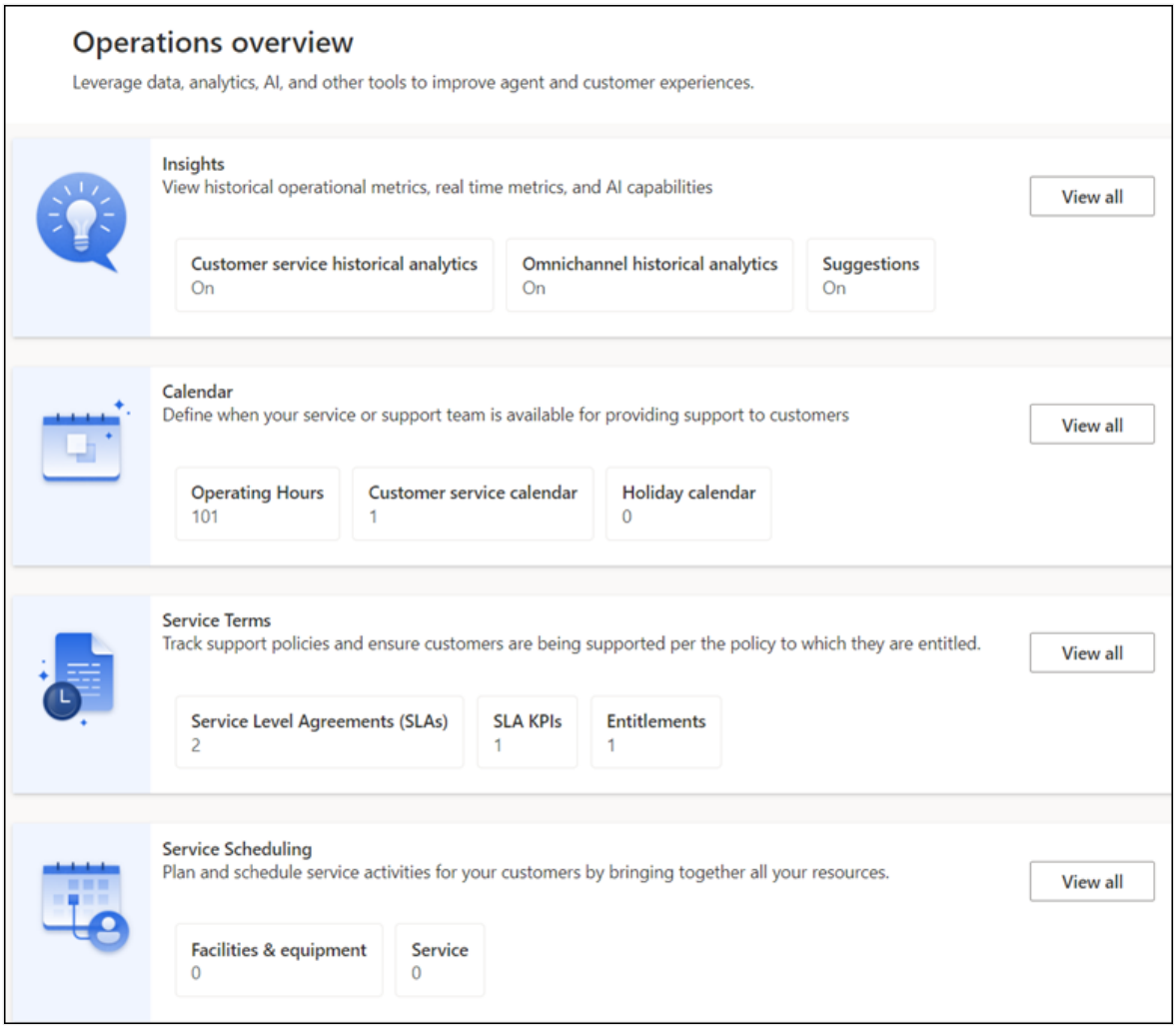
You can manage the following features in **Agent experience**:

- **Workspaces**: Agent experience profiles, templates, and third-party voice channel provider.
- **Productivity**: Transcripts, outbound profiles, templates for emails and messages, macros, and custom presence.
- **Knowledge**: Record types for which knowledge management needs to be enabled, filters, external portal, article templates, and search providers.



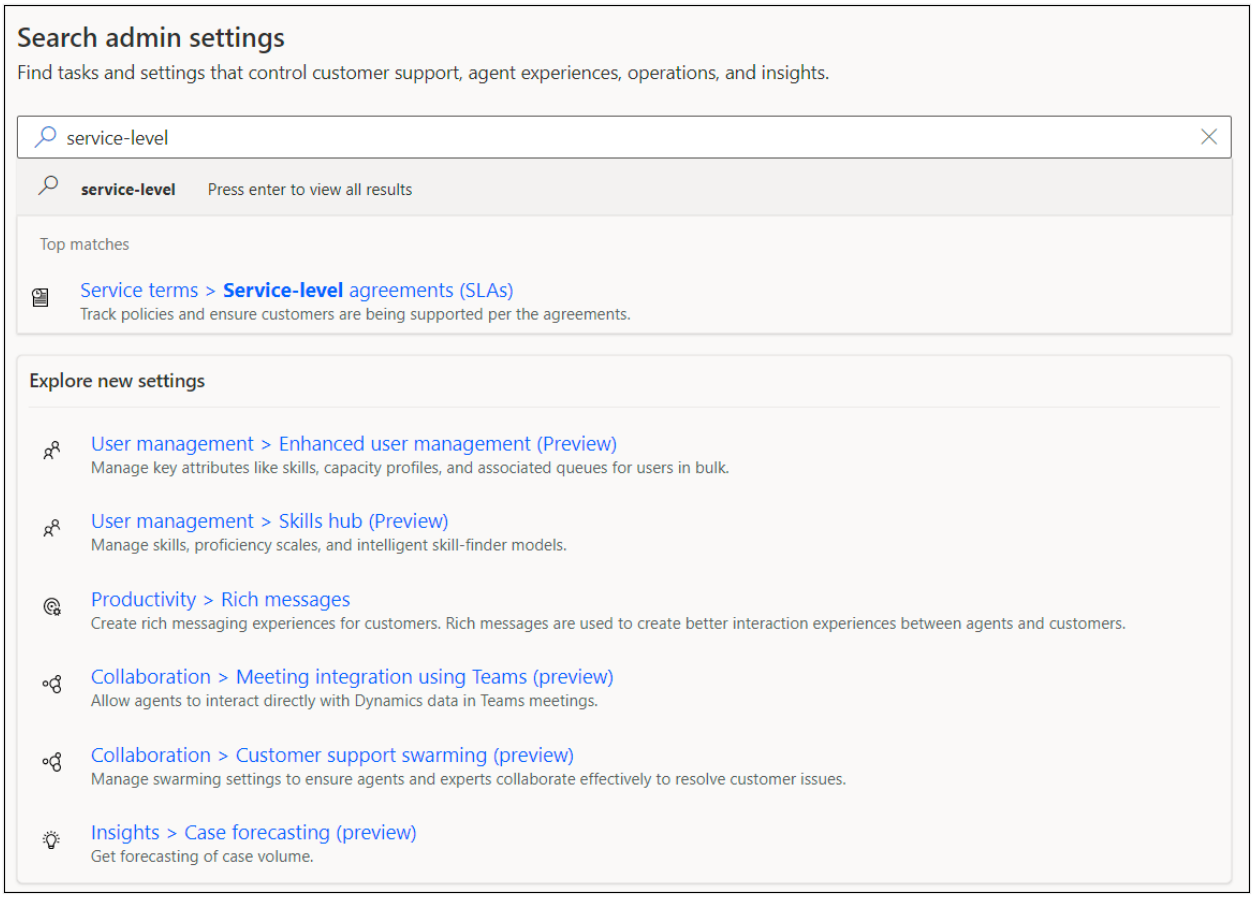
You can manage the following features in **Operations**:

- **Insights**: Historical analytics for Customer Service and Omnichannel for Customer Service, Omnichannel intraday insights and AI feature settings for cases and conversations, real-time translation and machine-learning models for skills, and skill-based, effort-based, and sentiment-based routing setup.
- **Calendar**: Operating hours, Customer Service calendar, and holiday calendar.
- **Service terms**: Service-level agreements (SLAs), SLA KPIs, and entitlements
- **Service scheduling**: Organizational units, facilities and equipment, resources, service scheduling, business closure, fulfillment preferences, and resource categories.
- **Miscellaneous**: Analysis jobs, migration tool, and IoT settings.



Search admin settings

Use the search option on the **Search admin settings** page to quickly list the admin setting that you want to manage. Along with the top matches, the page also lists settings for the new features.



FAQ

See the FAQ about Customer Service admin center for any questions that you might have.

See also

Help resources for Customer Service
Sign up for a free Dynamics 365 Customer Service trial
Overview of user management
Manage your bots in Omnichannel for Customer Service
Check your contact center health

Get started with Omnichannel admin center

Article • 04/07/2023

> **ⓘ Important**
>
> With the release of the Customer Service admin center app that consolidates admin experiences across the Customer Service suite, we announce that the following admin experiences are deprecated and no longer supported after April 2023.
>
> - Service Management area in the Customer Service Hub app
> - Omnichannel admin center
> - **App profile manager:** Is removed in April 2023.
>
> Also, starting in October 2022, the Omnichannel admin center and the service management area in Customer Service Hub will be hidden by default in newly created organizations and environments. You have the option to bring them back, but we recommend that you start using the Customer Service admin center app to perform tasks like manage cases, and configure unified routing, channels, and agent experience profiles. More information: **Get started with Customer Service admin center**

Omnichannel for Customer Service is a robust application that extends the power of Dynamics 365 Customer Service to enable organizations to instantly connect and engage with customers through channels, such as live chat, SMS, and WhatsApp. It provides a modernized design, with simplified and streamlined admin workflows that empower Omnichannel administrators to setup Omnichannel for Customer Service quickly with fewer efforts.

The Omnichannel admin center app lets you configure the channels, agents, and supervisor settings, and the corresponding features to use the channels for handling customer issues through conversations.

The app is automatically installed in all the Customer Service organizations that have Omnichannel for Customer Service provisioned. You can sign in to Dynamics 365, and on the apps page, select Omnichannel admin center.

If you are an upgrading user of Omnichannel for Customer Service, you can perform all the tasks in Omnichannel admin center that you'd been performing in the Omnichannel Administration app.

See also

Unified routing
Manage users in Omnichannel for Customer Service
Create workstreams
Create queues for conversations
Set up record routing
FAQs on unified routing

Learn the basics of the Customer Service Hub

Article • 03/21/2023

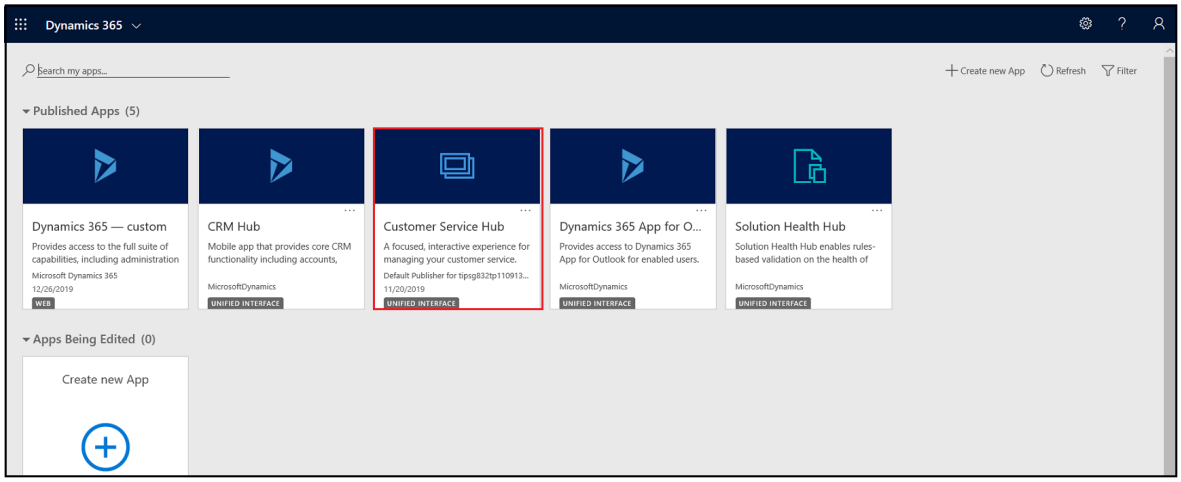
Open the Customer Service Hub

The Customer Service Hub app is available to use on a desktop browser and on a mobile device for managing knowledge articles and case management. You can open the Customer Service Hub in one the following ways:

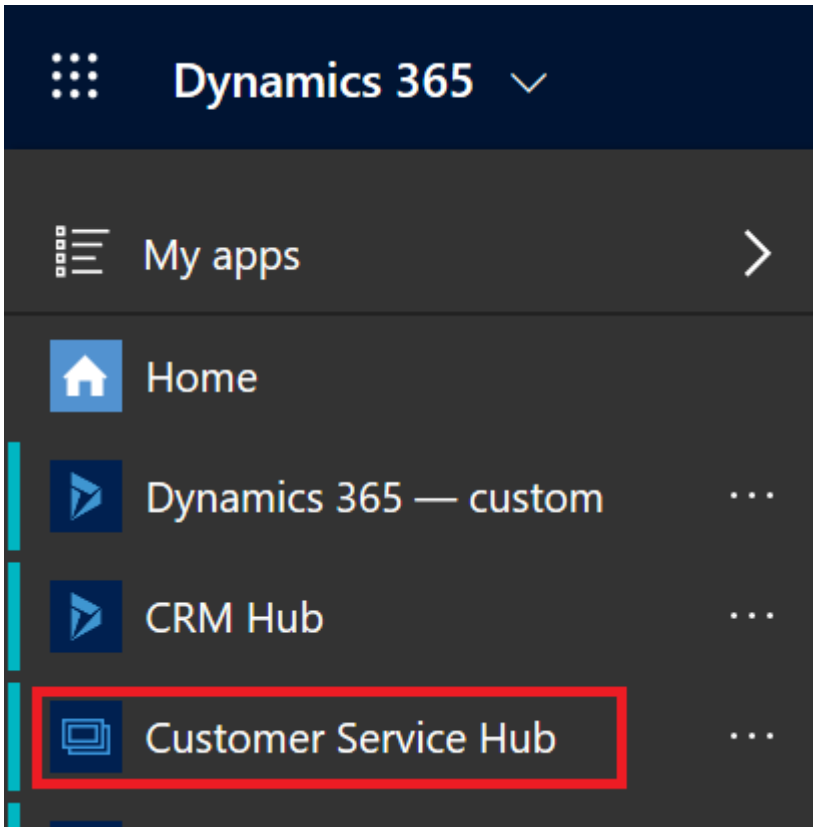
> **Note**
>
> These options are available only to users with the Customer Service app access role, System Administrator role, or System Customizer role.

Desktop browser

- On the Dynamics 365 page, in the **Published Apps** area, select **Customer Service Hub**.



- If you're on the Settings page, then in the Dynamics 365 Customer Service site map, navigate to the app switcher, and then select **Customer Service Hub**.



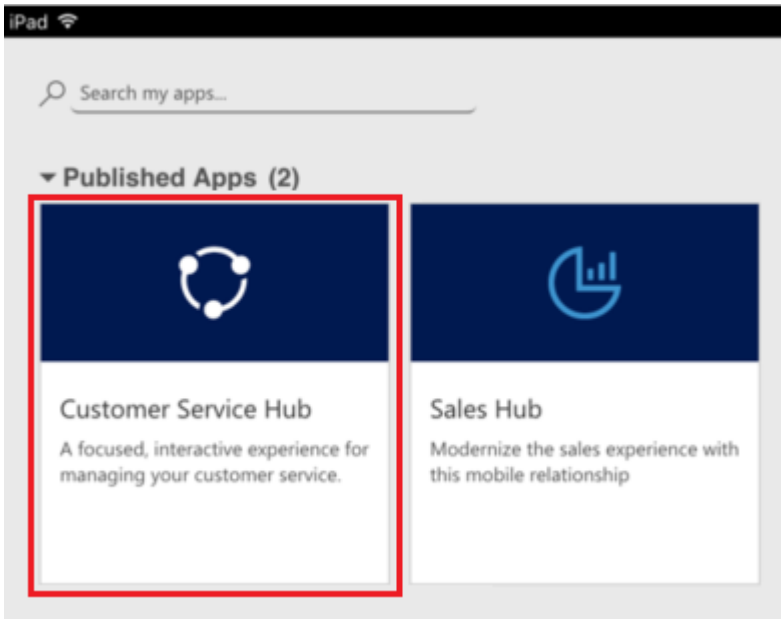
Mobile device

To access the Customer Service Hub app on a mobile device:

1. Install the Dynamics 365 Customer Service mobile app.

To install the Dynamics 365 Customer Service mobile app, see Install Dynamics 365 for phones and tablets

2. From the My Apps page, select **Customer Service Hub**.



Work with case management record types, dashboards, and tools

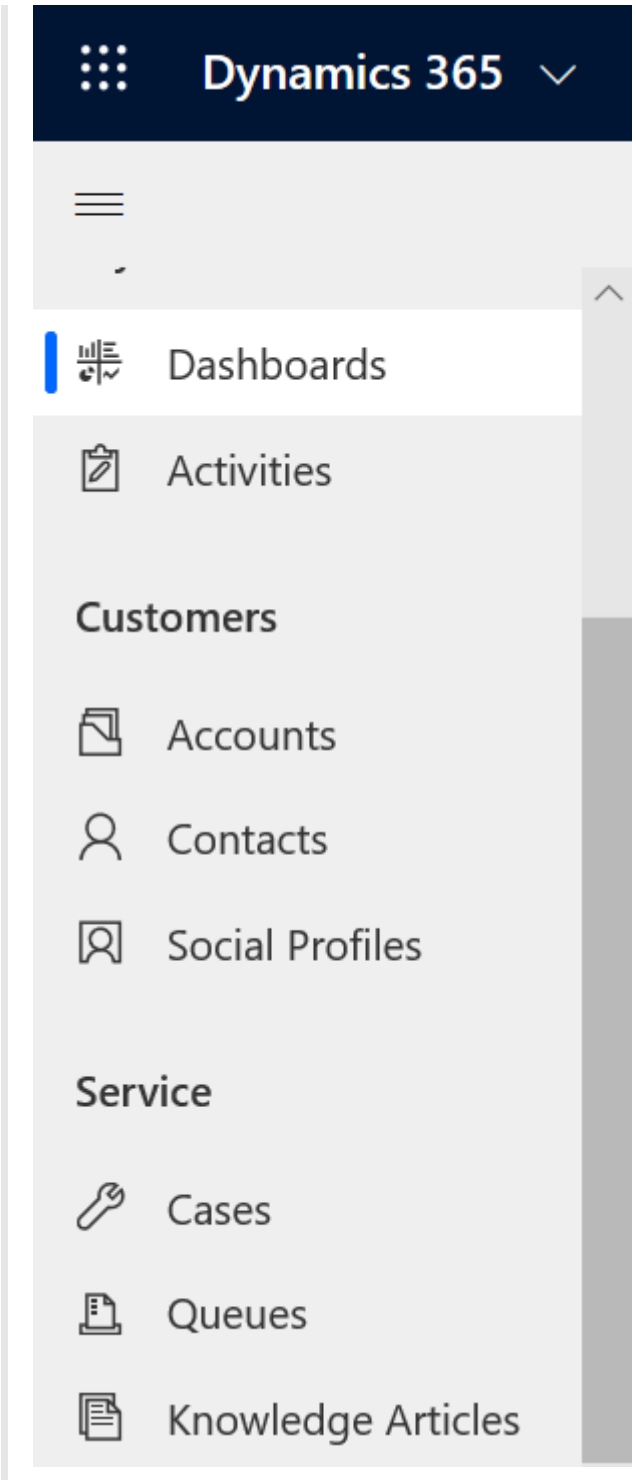
In the Customer Service Hub, you'll find everything you need to easily manage customer service for your organization:

- Dashboards
- Activities: Email, Task, Appointment, Phone Call, Social Activity
- Accounts
- Contacts
- Social Profiles
- Cases
- Queues
- Knowledge Articles

The Customer Service Hub app comes with an enhanced site map to enable easy navigation of the interface. More information: Understand the site map navigation.

Understand the site map navigation

1. Select the site map icon , select **Service**, and then select an entity record type.



When you select a record type from the menu, such as Accounts, Contacts, or Cases, you'll see a list of corresponding customer records (also known as Entity grid).

To view recently opened records, select the down-arrow next to the record type in the site map.

Here's what each entity record type is used for:

- **Dashboards** collect all your most important data in one place. You can select from multiple dashboards as per your role.
- **Activities** help you keep track of tasks, email messages, appointments, phone calls and much more.

- **Accounts** are the companies you do business with.
- **Contacts** help you manage and store information about the customers you work with.
- **Social Profiles** let you track a contact's presence in social media.
- **Cases** help you create and track your customer requests and issues.
- **Queues** keep a track of cases waiting for you to work on.
- **Knowledge Articles** capture your customer's questions, issues, feedback, and resolutions, so that other service reps can benefit from them.

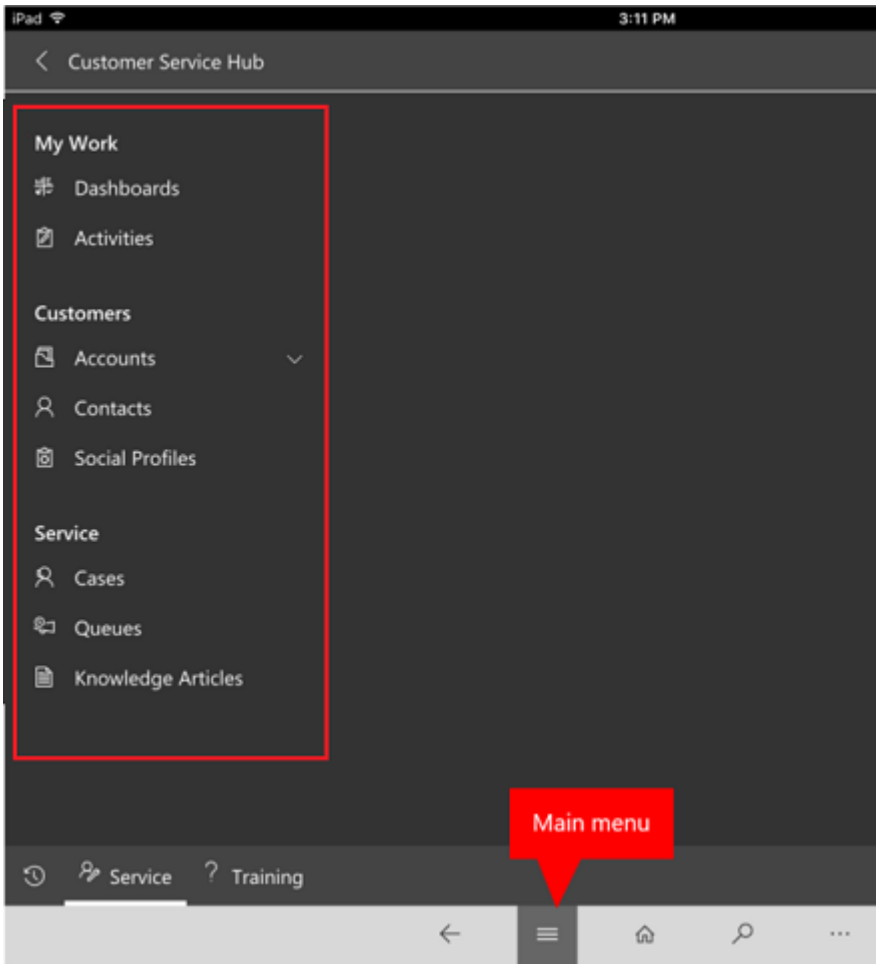
2. Select **...** to go to **Training**, and access the documentation site to view the **Help Center**.

3. You can also access **Service Management** from the site map. Service Management lets you define all the customer service admin settings from the Customer Service Hub site map. Select **...** to go to **Service Management**.

   More information: Configure Customer Service.

4. Select **Favorites and Recent** button to see recently viewed records, or to see views that have been pinned as favorites.

   For a mobile device, the site map is displayed as illustrated in the following image:



Open the default dashboard for a record type

When you're viewing the list of records for a specific record type, select **Open Dashboards** in the command bar to switch to the default dashboard for that record type.

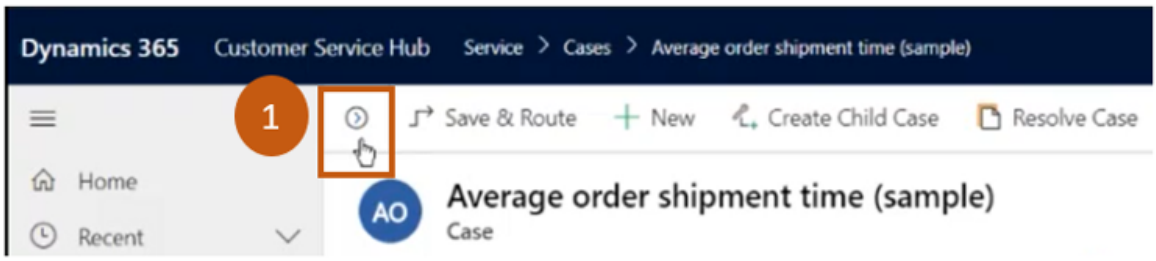
To return to the list of records, select **Open Views** in the command bar.

More information: Use interactive dashboards to effectively manage service cases

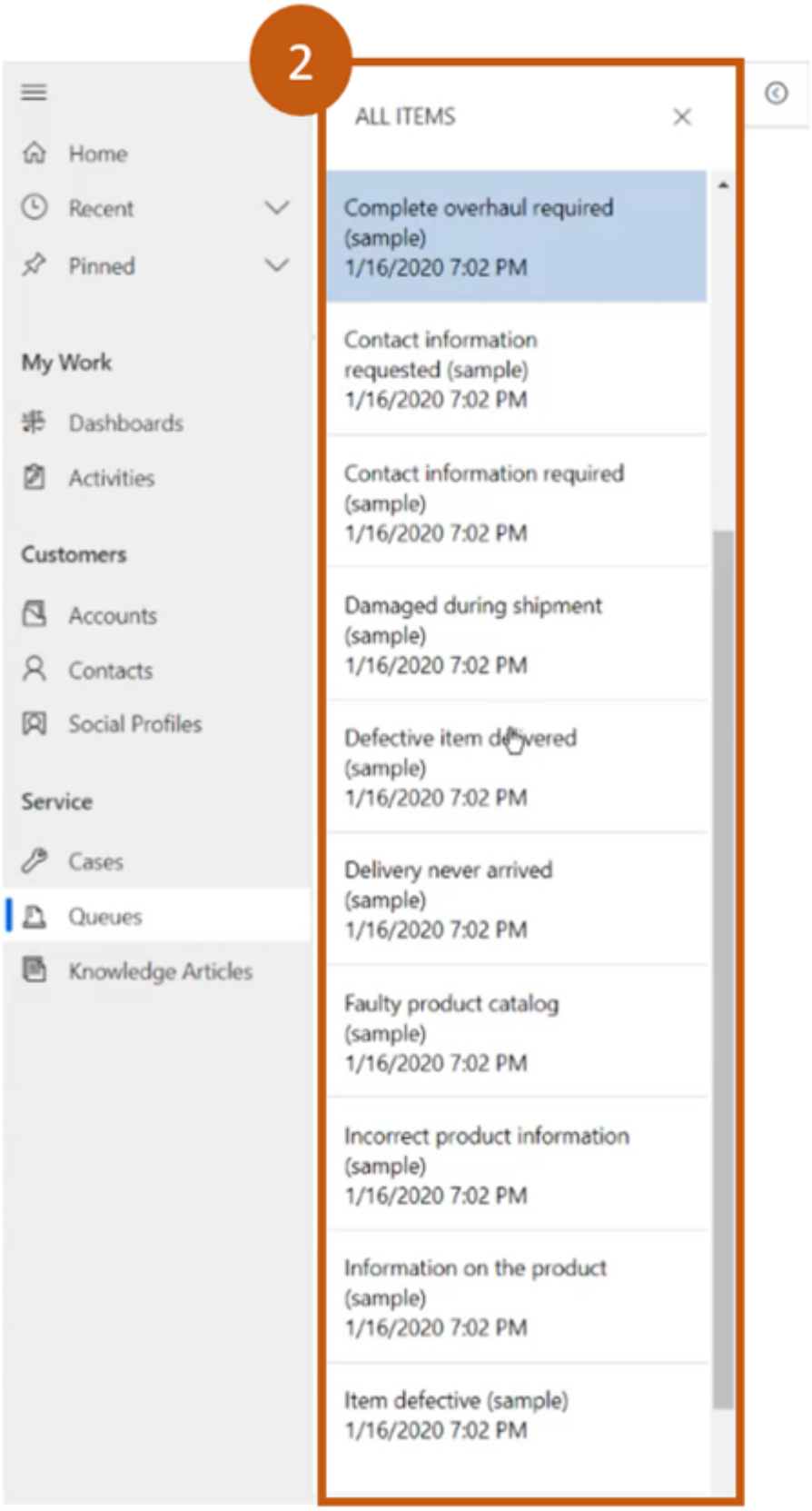
Navigate through records and pages

When you're viewing a record:

1. Select and expand **Open Record Set** to navigate to other records.



2. A side panel opens where you can view other records. You can directly select the records from the panel and view the details of the record.



Note

The option Open Record Set will not be available on devices with comparatively smaller screen sizes.

More information: Create and manage queues and Create and manage a case.

Quickly create new records

- To create records quickly by filling in only the most basic information, select the **New** button given on the nav bar.

  > **Tip**
  >
  > On a mobile device, from the nav bar, tap ··· and then tap **Quick Create Menu**.

Email a link

You can email links to records so your colleagues can quickly find these records by selecting the links. To email links to records, select one or more records in the list, and then on the command bar, select **Email a link**. The default email client opens with the links to these records. The recipients will see all content in the records for which they have permission.

Know your forms

Forms are designed to help you quickly handle important customer service tasks and complete actions from a single place.

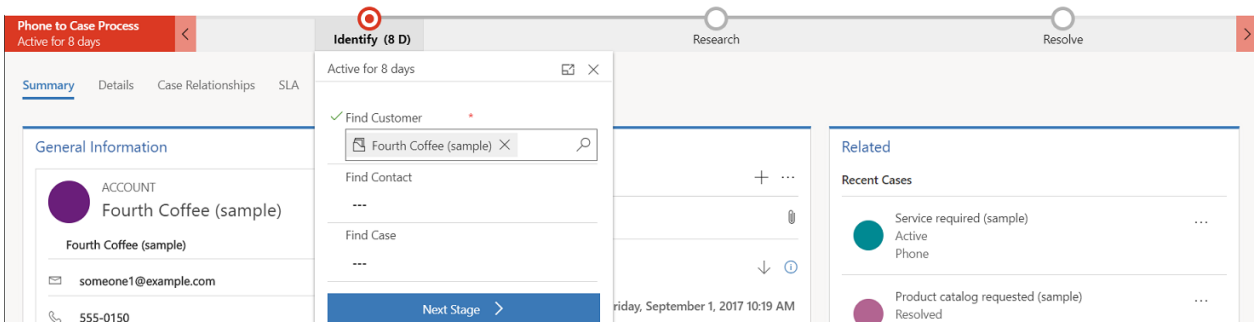
The different components of a form are explained in the following sections.

Business processes

In the Customer Service Hub, forms for cases and knowledge articles include a process bar (also called a business process flow), which appears when you save the record for the first time.

When you select a process stage on the process bar, you'll see the steps to take to complete that stage. A flag on a stage indicates the stage you're currently on. When you select an active stage, you can see the **Next Stage** button move to the next stage in the process.

The stages in the business process flow are displayed in floating mode, or docked mode. Stages can be aligned in a vertical layout, instead of horizontal, which makes it easier to see what steps are required to move forward. You can also choose to include an optional step in the business process flow and define criteria to trigger it.



If there's more than one process to follow, you can switch between them by selecting **Process** > **Switch Process** on the command bar, and then selecting the process you want to use. Or you can choose to abandon the process if it no longer applies.

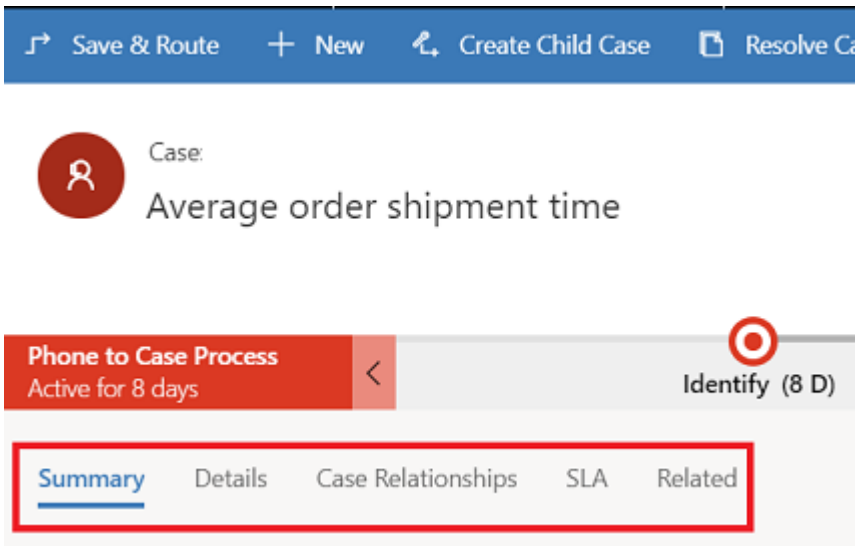
When a business process flow based on multiple entities is applied to a case or a knowledge article, the following limitations apply:

- The business process flow based on multiple entities isn't displayed on the form.
- The **Switch Process** option only shows business process flows that are based on a single entity.
- If there are only multi-entity business process flows for an entity, the **Switch Process** option isn't available.

Tabs on the form

Each case form is composed of one or more tabs. By default, the **Summary** tab shows information about the customer, interactions with the customer, and other related records. You can select different tabs to enter or see other miscellaneous details of a record.

For example, here's a view of how the tabs appear on the case form:

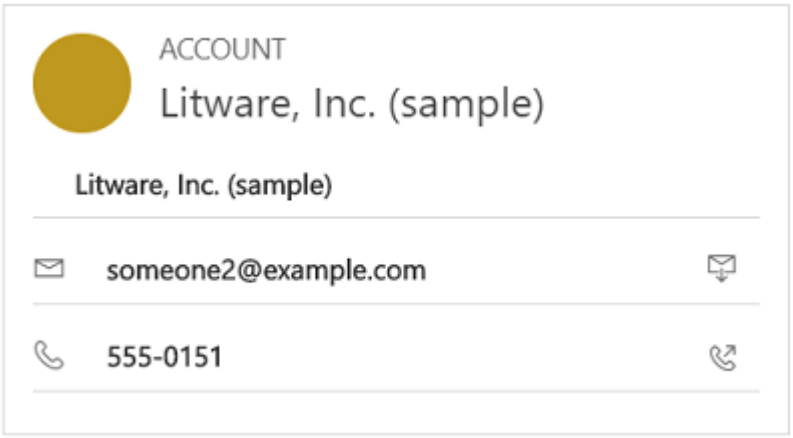


This table lists the default tabs for each record type and the information that they show for a particular record.

Record type	Default tabs
Case	**Summary**. Includes the customer card, Timeline, and the Related section. **Details**. Tracks Case details, other details, and social response details of the case. **Case Relationships**. Shows merged cases, child cases, and associated knowledge articles. You can add a child case to the current case from the Child Cases list. It also shows a list of knowledge articles associated with the case. **SLA**. Shows the related SLA KPI Instance records that are created for each SLA KPI that is tracked for the case. **Related**. Shows related entities, such as activities and connections.
Account	**Summary**. Includes the customer card, Timeline, and the Related section. **Details**. Tracks other details like company profile, marketing details, contact preferences, and billing and shipping. **Related**. Shows related common entities.
Contact	**Summary**. Includes the customer card, Timeline, and the Related section. **Details**. Tracks other details like personal information, marketing details, contact preferences, and billing and shipping. **Related**. Shows related common entities.
Activities	Activity forms show a tab called Task for the respective activity and a Related tab for common entities.
Knowledge Articles	**Content**. Lets you write and edit the content for the article. **Summary**. Tracks basic settings, Timeline, publishing settings, and related information. **Analytics**. Shows the number of views, feedback, and a list of cases using the article. **Related**. Shows related common entities.
Social Profiles	**Social Profile**. Captures general information, and social profile details along with related social profiles. **Related**. Shows related common entities.

Contact card

See a complete view of your customer's touch points in the Contact card. This card is available in the **General Information** section of the **Summary** tab.

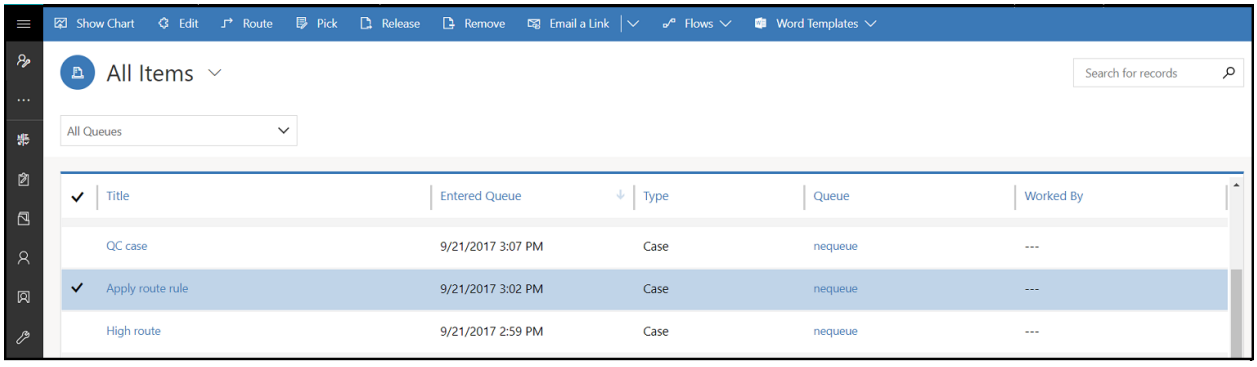


You can add a picture to the account or contact record in Dataverse, and it will appear on this card. You can make calls to customers from the Contact card using Skype for Business – IP telephony.

For account records, the card shows contact details for the primary contact associated with the account. For contact records, the card appears if the contact is the customer value on the case form.

Work with Queues

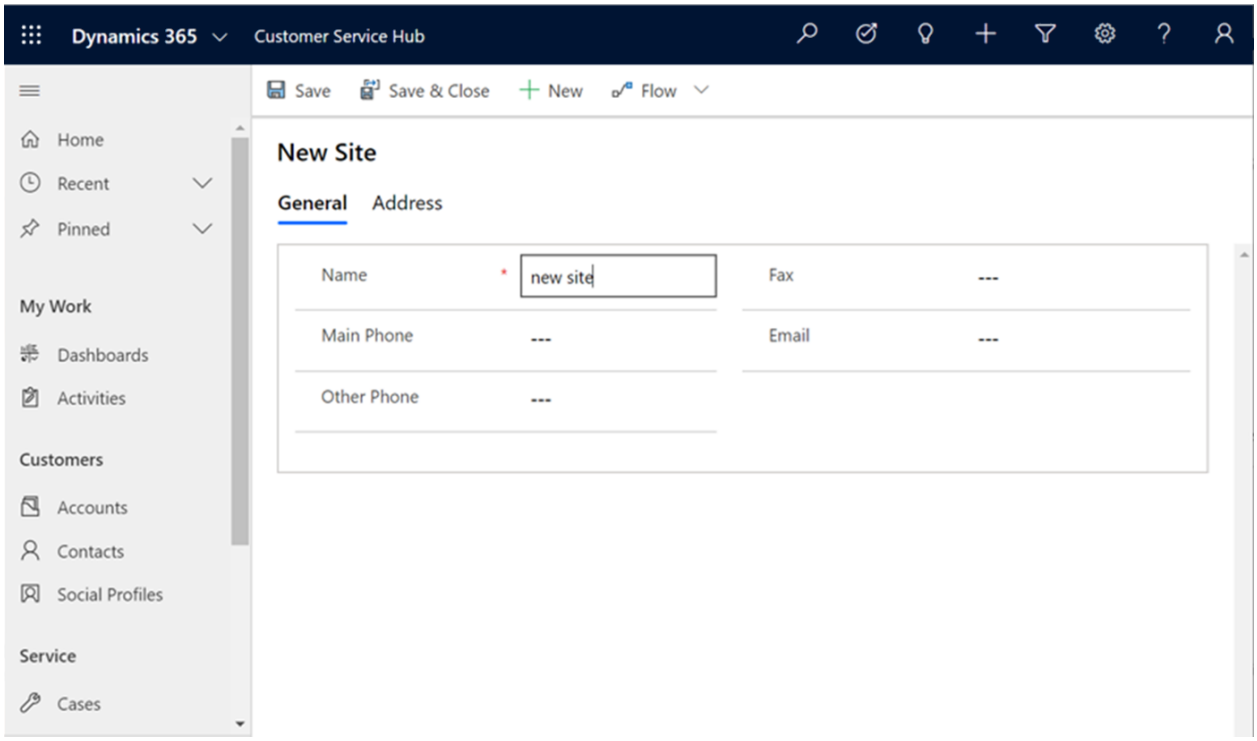
Use queues to organize, prioritize, and monitor the progress of your work. In Dynamics 365 Customer Service, queues are containers that are used to store anything that needs to be completed or requires an action. For example, you could use queues for completing a task or closing a case. To learn more about creating and managing queues, see Create and manage queues.



To know how to add a case to a queue, see Add a case to a queue.

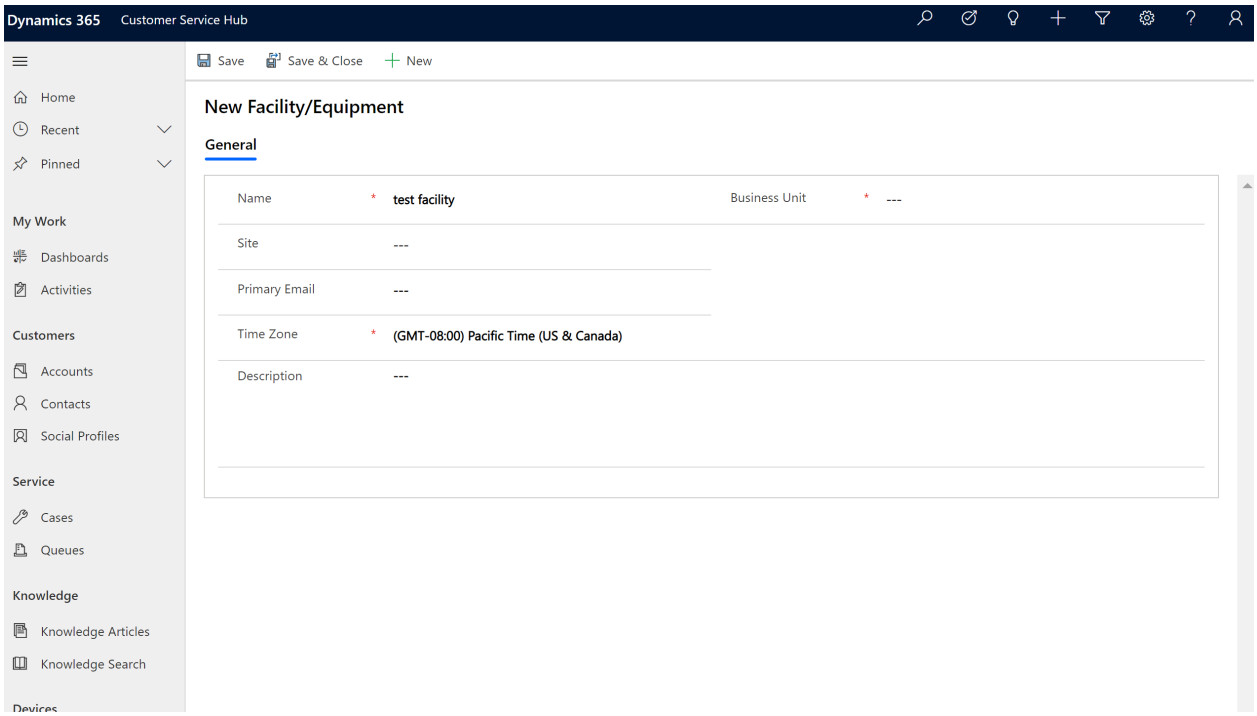
Understand Site

To create a new site, you need to go to **Advanced find** . Then you can customize other entity forms (for example, Account) by adding this site field.



Understand Facility/Equipment

To create a new Facility/Equipment item, you need to go to **Advanced find** , where you can create Facility/Equipment.

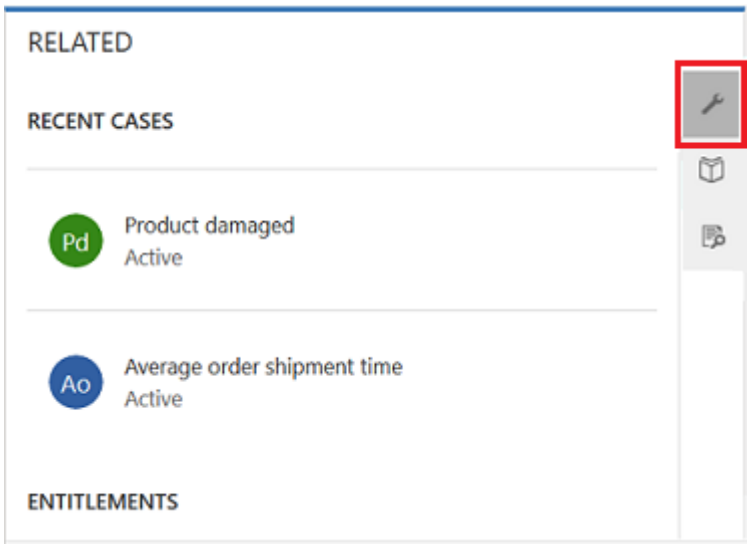


Related section

In the **Related** section (also known as Reference panel), use the tabs to see related records for the current record. This section is enabled by default for account, contact,

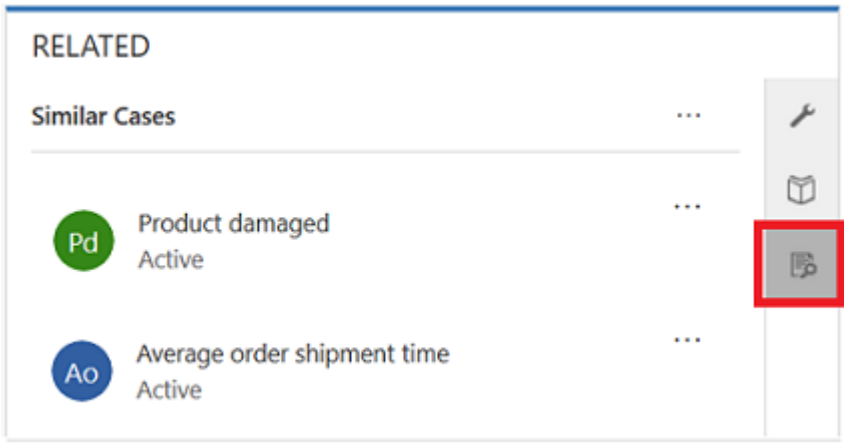
case, and knowledge article records. Your customizer can add this section for all entities (including custom entities) that are enabled for interactive experience. The reference panel is also available in model-driven apps. For information, see Reference Panel in model-driven apps .

By default, the first tab in the Related section of a case record shows the **Recent Cases and Entitlements** for the current case record you're working on.



The second tab in the Related section of a case record is the **Knowledge Base search**. Knowledge Base search lets you search for the knowledge articles related to a specific record. It also lets you view automatic suggestions. You can filter the search results to display articles that are Published, Draft, or Approved. For more information, see Search for Knowledge articles.

The third tab in the Related section of a case record displays **Similar Cases**. Select **...** on a record to follow or unfollow the case, and explore other options.



Watch this video to learn more about the Reference Panel in the Customer Service Hub: https://www.microsoft.com/en-us/videoplayer/embed/d8224c3f-6e20-4b8e-9d0d-b0f5602c7708?postJsllMsg=true

> ⓘ **Note**
>
> You can configure rules that help you view similar cases based on automatic suggestions. For more information, see **Use advanced similarity rules to view similar case suggestions**.

Similarly,

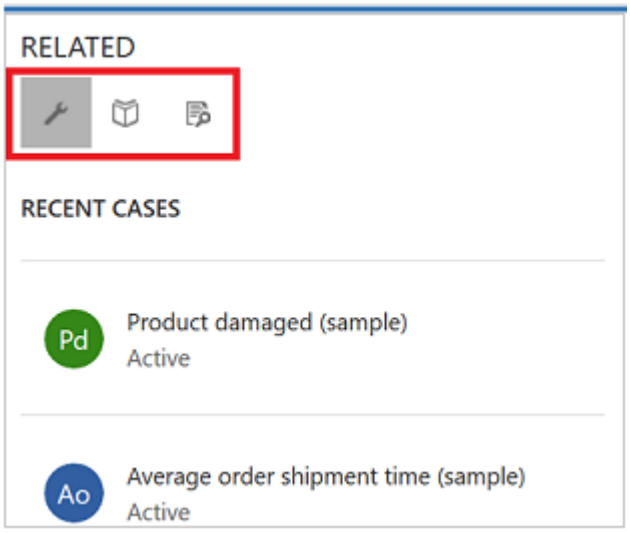
- For **Accounts** records, you can view **Contacts**, **Recent Opportunities**, **Recent Cases**, and **Entitlements** in the Related section.
- For **Contacts** records, the Related section displays **Recent Opportunities**, **Recent Cases**, and **Entitlements**.
- For **Knowledge articles** records, select an article and go to the **Summary** tab to view the **Related Information** panel. Here you can view **Related versions**, **Related translations**, **Related categories**, **Related articles**, and **Related products** for an article.

> ⓘ **Note**
>
> Your system administrator or customizer can choose if Related section should be included in a form. They can also decide on what related data should be displayed in the section for each form.

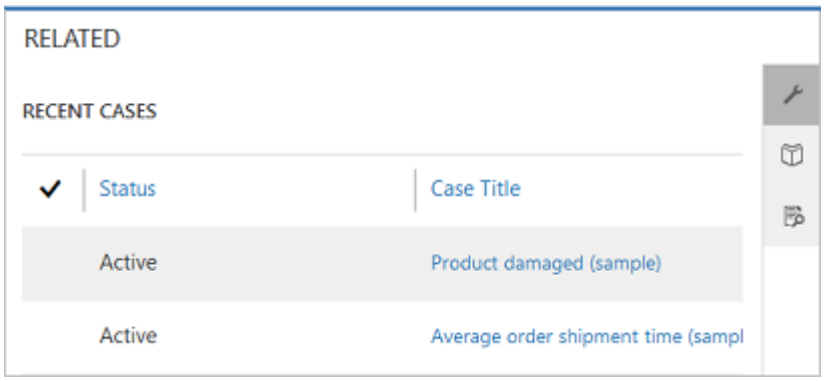
Reference Panel reflow

The Customer Service Hub is available to use on a desktop browser, and on a mobile device. Depending on the zoom level and the resolution of the system on which you're accessing the hub interface, the Reference panel adjusts the tabs and records for an optimum experience.

For example, on a browser, if you zoom in to about 100% or more, the tabs get docked on the top of the panel.



Similarly, if you zoom out to about 60-70%, the records appear in grid form.



Understand Activities

Activities are the tasks that you or your team perform while interacting with customers. An activity is any action that can be entered on a calendar and has time dimensions (start time, stop time, due date, and duration) that help determine when the action occurred or is planned to occur.

For example, you can make a record to track a phone call with a customer, or list an appointment scheduled with a customer to discuss a certain issue. You can create activities for yourself, or assign them to other service reps.

In Dynamics 365 Customer Service, the following activities are supported:

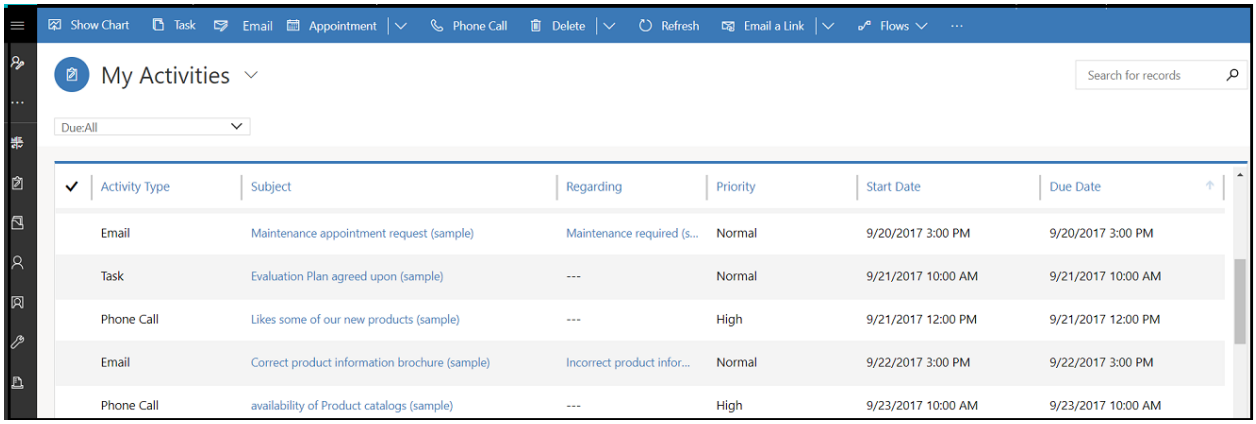
- Email
- Task
- Appointment
- Phone Call
- Social Activity

> ⓘ Note

You can create and edit emails in the Customer Service Hub app on a desktop browser. However, on a mobile device, email is read only on the app.

Open Activities view

In the Customer Service Hub site map, select **Service** > **Activities**. The **My Activities** view is displayed.



- Select in the nav bar to go to **Activities** to quickly add a new activity.
- Select **My Activities** to switch between activity views.
- Select **Due** to see the list of activities that are due in coming time or are already overdue.
- Explore the command bar options to create a new activity like new **Task**, **Email**, **Appointment**, or **Phone call**.

  For example: To create a new email, select **Email** from the command bar. The New Email activity form is displayed.
- Select **...** in the command bar and go to **Open Dashboards** to directly open activity dashboard.
- To view the status of an activity, select the activity record. The status is displayed in the bottom left corner of the activity form.

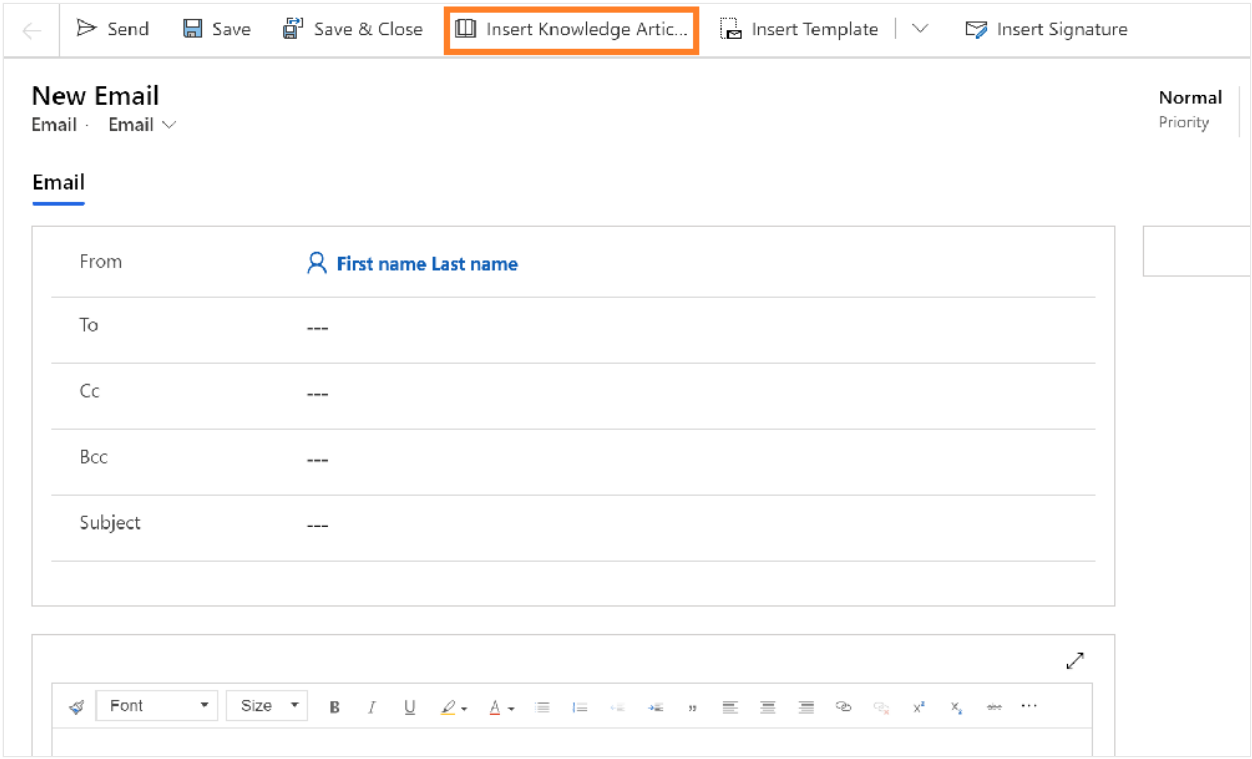
Insert a knowledge article into an email

While working on an email, you can quickly help customers by searching and selecting a relevant knowledge article to include in your email. You can insert the article and/or share a link to it in the body of your message.

You can insert a knowledge article in an email in Dynamics 365 Customer Engagement (on-premises) 9.1. More information: New features in Dynamics 365 Customer Engagement (on-premises)

1. On an email form where you're drafting, place your cursor where you want to place the knowledge article or its link, and then select **Insert Knowledge Article**.

   The **Select knowledge article to insert** screen is displayed.

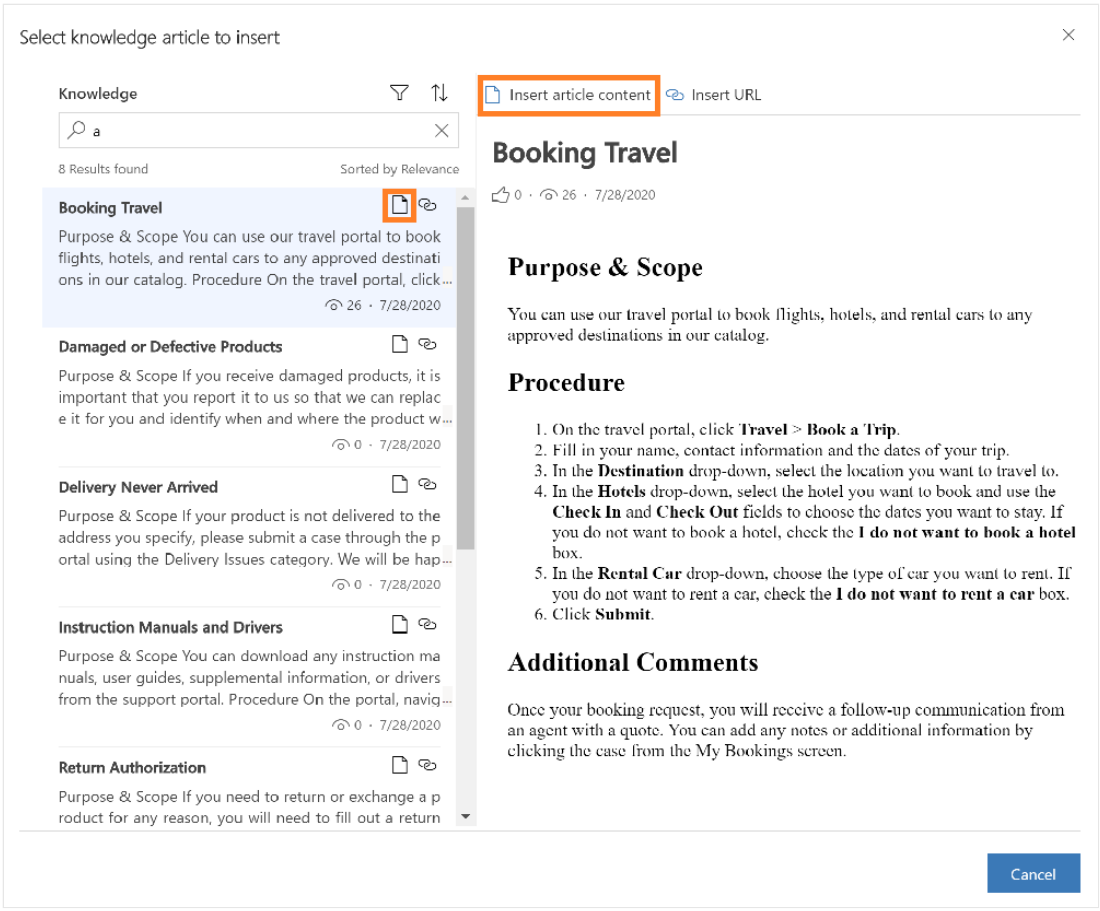


2. Search for the article you want to include. For more information about searching for knowledge articles, see Search for knowledge articles in the Customer Service Hub.

   A list of available articles will be displayed. You can select an article in the search results to view it in the preview pane.

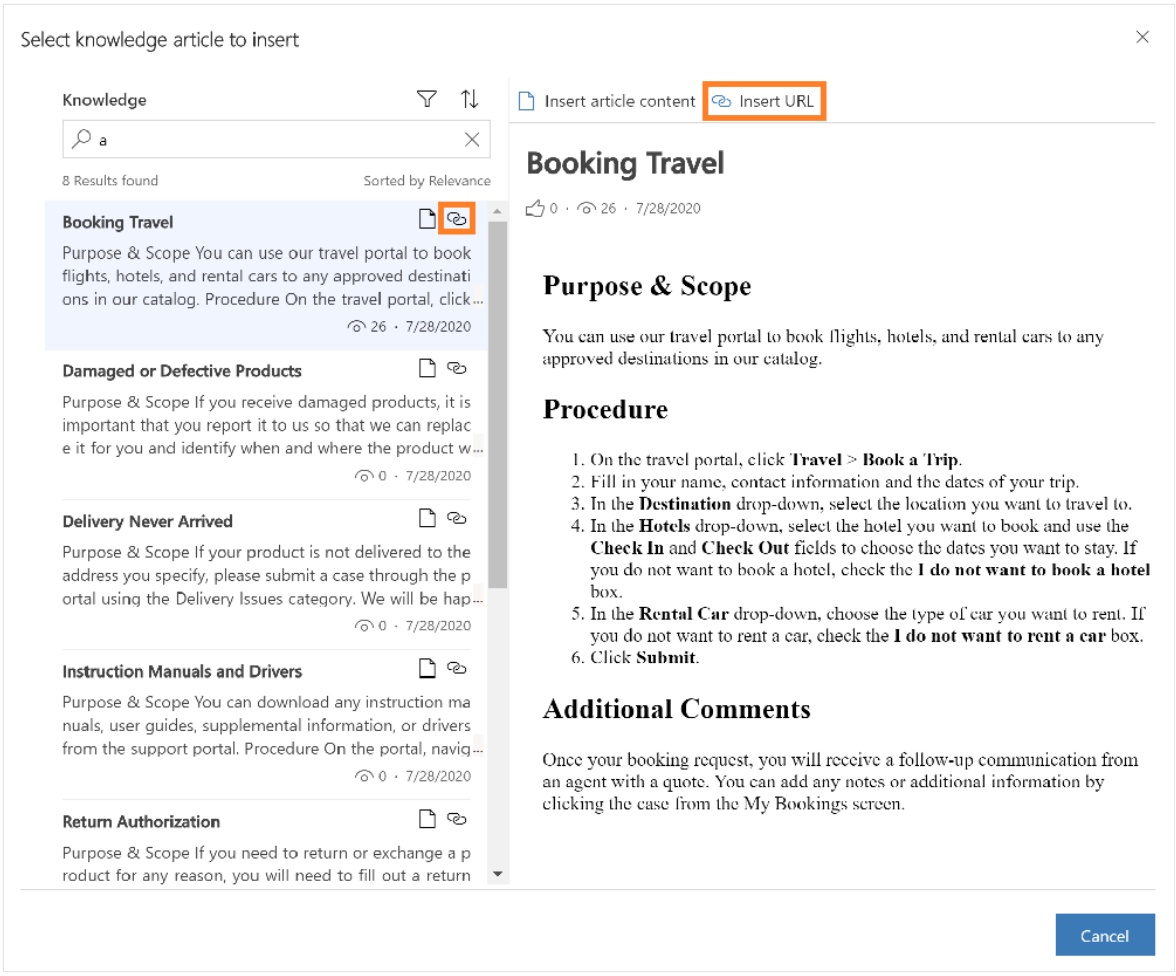
3. When you've found the article you want to include, do one of the following actions:

   - To insert an article into the email, select the **Insert content** icon for the article in the search results or in the article preview pane, select **Insert article content** at the top of the pane. This will insert the content into the body of your email and close the **Select knowledge article to insert** page.



> **Note**
>
> - To insert a knowledge article into a field that is enabled for using the rich text editor options, you must first configure the custom rich text editor for the field. For more information on this configuration, see **Customize the email experience**.
> - If you add more than one field, and then select **Insert Knowledge Article**, by default, the knowledge article gets inserted into the first field in the form.

- If your administrator has set up an external portal that supports a URL format, you can include a link. For more information, see Set up knowledge management (Customer Service Hub). To insert an article as a link in the email, select the **URL** icon for the article in the search results or in the article preview pane, select **Insert URL** at the top of the pane. This will insert a link to the article into the body of your email and close the **Select knowledge article to insert** page.

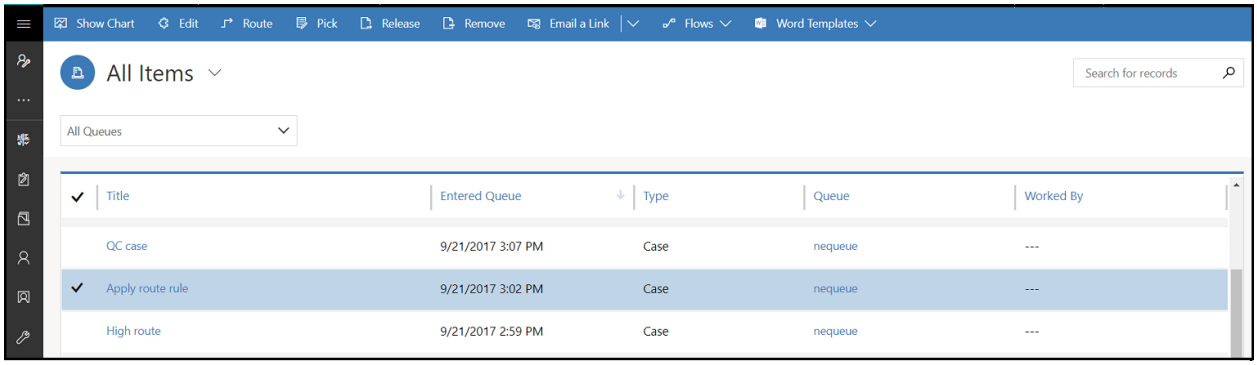


Create and Manage Queues

Use queues to organize, prioritize, and monitor the progress of your work. In Dynamics 365 Customer Service, queues are containers that are used to store anything that needs to be completed or requires an action. For example, you might use a queue for completing a task or closing a case. To know more about creating and managing queues, see Create and manage queues.

Open Queues view

In the Customer Service Hub site map, select **Service** > **Queues**. The queues view is displayed.

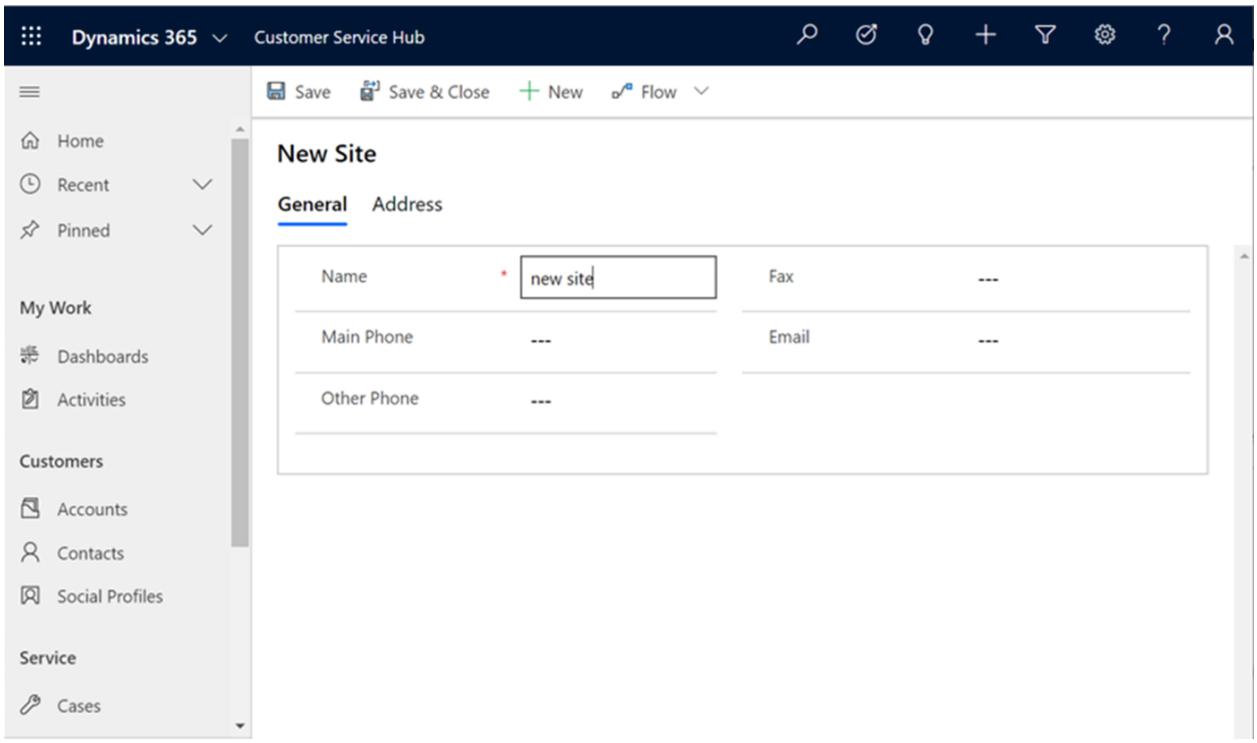


- Use the drop-down lists to switch between the views and the various queues.
- Select a record in the queues view to:
  - **Edit** the record
  - **Route** the record
  - **Pick** the record. It will be assigned to you and will be moved to your queue.
  - **Release** the record. It will be assigned back to the queue owner for other's to pick up.

To learn how to add a case to a queue, see Add a case to a queue.

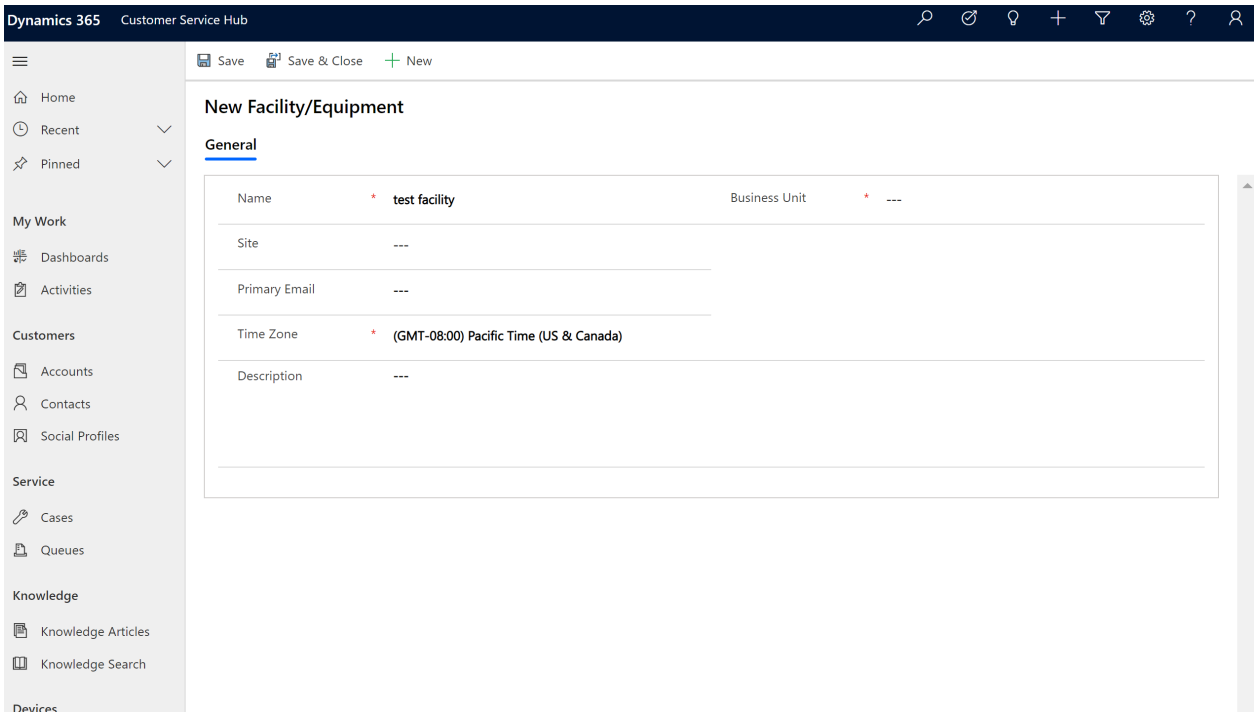
Create a new site

To create a new site, go to **Advanced find** . Then you can customize other entity forms (for example, Account) by adding this site field.



Create a facility/equipment item

To create a new Facility/Equipment item, go to **Advanced find** , where you can create Facility/Equipment.



See also

Create and design forms for Customer Service Hub

Track your cases efficiently and act on them quickly

Configure Customer Service

Article • 09/30/2022

> **Important**
>
> With the release of the Customer Service admin center app that consolidates admin experiences across the Customer Service suite, we announce that the following admin experiences are deprecated and no longer supported after April 2023.
>
> - Service Management area in the Customer Service Hub app
> - Omnichannel admin center
> - **App profile manager:** Is removed in April 2023.
>
> Also, starting in October 2022, the Omnichannel admin center and the service management area in Customer Service Hub will be hidden by default in newly created organizations and environments. You have the option to bring them back, but we recommend that you start using the Customer Service admin center app to perform tasks like manage cases, and configure unified routing, channels, and agent experience profiles. More information: **Get started with Customer Service admin center**

Use the Customer Service Hub app to set up everything related to customer service, like defining parent-child case hierarchy, creating queues, routing rule sets, rules for automatic case creation, service-level agreements (SLAs), entitlements, and customer service schedules.

Customer Service Hub

Use the Service Management to set up various admin tasks for customer service.

In the bottom left pane, select the change area, and select Service Management.

More information: Understand the site map navigation

Customer Service app

In the Customer Service app, navigate to **Settings** > **Service Management**.

Case settings

- Queues
- Parent Child Case Settings
- Routing Rule Sets
- Automatic Record Creation
- Subjects

Service terms

- Service Level Agreements
- Entitlements
- Holiday Schedule
- Customer Service Schedule
- Service Configuration Settings

Templates

Entitlement Templates

Knowledge Base Management

- Embedded Knowledge Search
- Categories

Similar Record Suggestions

Suggest similar cases using advanced similarity rules

See also

What's new in Dynamics 365 Customer Service

Omnichannel for Customer Service for administrators

Article • 10/03/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

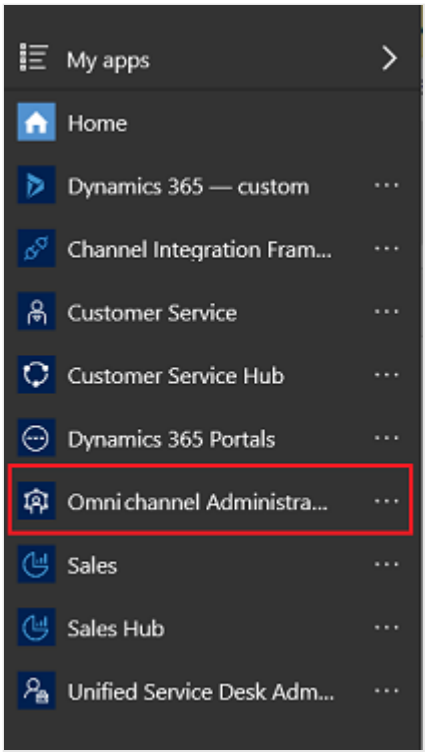
> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

Omnichannel for Customer Service is a customizable application you can effectively configure to meet the requirements of your business. Use Omnichannel for Customer Service to manage users (agents and supervisors), work streams, conversations, and queues, and effectively route important conversations to agents quickly. You can manage the capacity of agents so they handle conversations effectively and assist your customers better. You can manage the types of conversations agents receive using work stream and queue configurations.

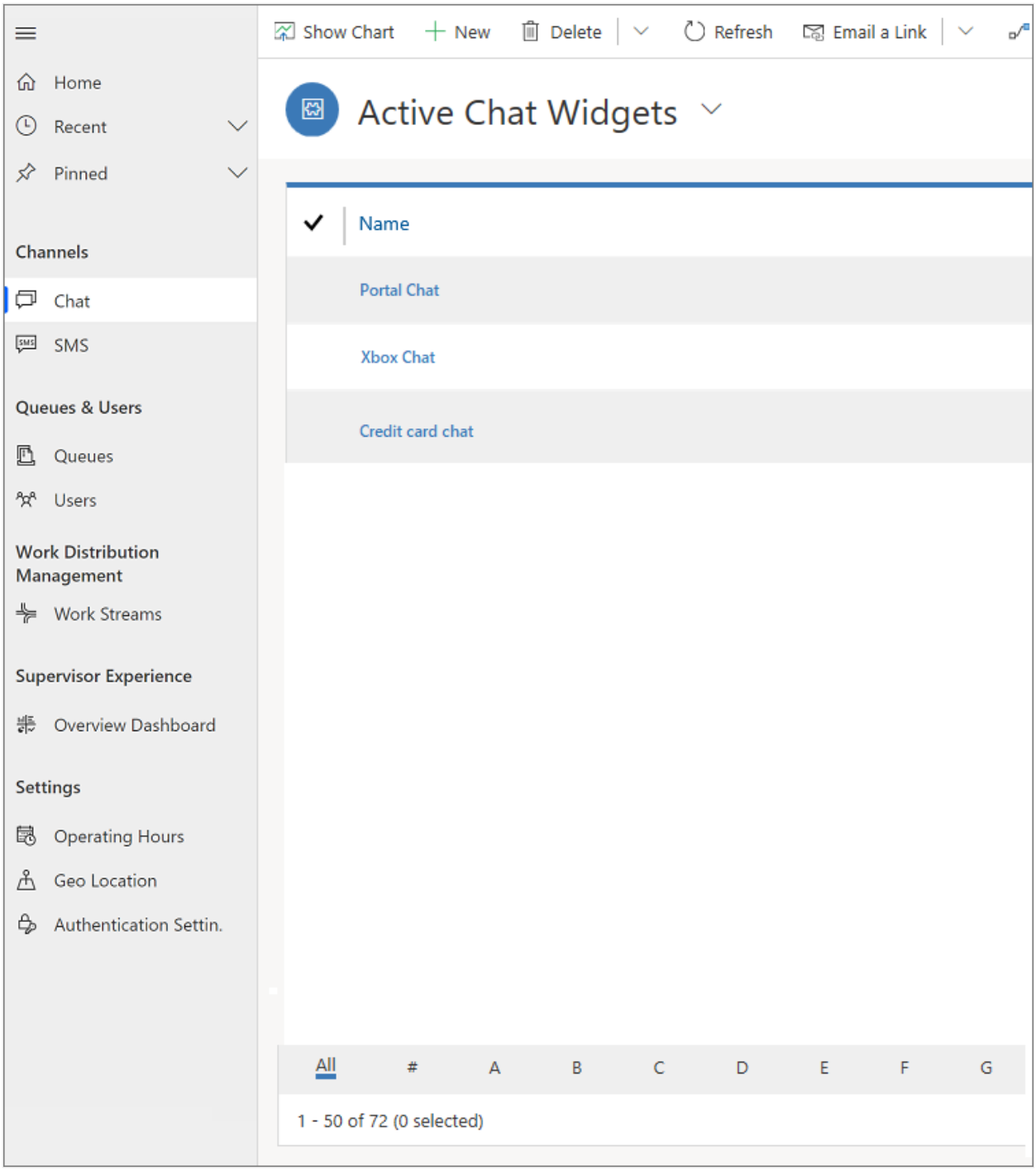
Access Omnichannel for Customer Service for administrators

1. Provision the Omnichannel for Customer Service app. Follow the steps given in Provision Omnichannel for Customer Service to set up and enable the Omnichannel for Customer Service app in your instance.

2. After the app is enabled, go to the apps page, navigate to the app switcher and then select **Omnichannel Administration**.



You can view the entities in the **Omnichannel Administration** site map.



In this section

- Understand routing and work distribution
- Understand and create work streams
- Create a chat widget

How-to topics

- Assign roles and enable users for Omnichannel for Customer Service
- Manage a user in Omnichannel
- Configure a chat channel

- Configure an SMS channel
- Configure a Facebook channel
- Automatically identify customers using pre-chat responses
- Create custom presence status
- Create a new Omnichannel queue
- Create a routing rule
- Enable knowledge articles in the Omnichannel for Customer Service
- Add a chat widget
- Configure a pre-chat survey
- Create quick replies
- Create and manage operating hours
- Create chat authentication settings
- Embed chat widget in Power Apps portals

Introduction to Omnichannel for Customer Service

Article • 08/09/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Tip

- If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.
- Explore **Copilot**, a feature that significantly enhances agent productivity in Customer Service.

Omnichannel for Customer Service is a robust application that extends the power of Dynamics 365 Customer Service to enable organizations to instantly connect and engage with their customers via channels like Live Chat, voice, and SMS.

Omnichannel for Customer Service also provides a modern, customizable, high-productivity app that allows agents to engage with customers across different channels. The application offers contextual customer identification, real-time notification, integrated communication, and agent productivity tools like knowledge base integration, search, and case creation to ensure agents are effective.

Supervisors get real-time and historical visibility and insights into the operational efficiency of agents and the utilization across various channels.

The enterprise-grade routing and work distribution engine allows customers to configure agent presence, availability, and routing rules, thus ensuring agents are working on the most relevant engagements.

Important

- Omnichannel for Customer Service uses third-party cookies for authentication. Make sure that the cookies are not blocked in your browser in any mode so

that certain services, such as agent or supervisor presence, can work properly.
- The multisession mode and navigation capabilities are supported in the Omnichannel for Customer Service and Customer Service workspace apps only, and not in copies of these apps or custom apps.

Channels available with Omnichannel for Customer Service

You can enable the following channels in your organization with Omnichannel for Customer Service.

Chat

Chat is an engagement channel that enables your agents to connect with customers in real-time. More information: Try channels for Dynamics 365 Customer Service and Configure a chat channel

SMS

SMS is an engagement channel that supports asynchronous mode of communication, and allows your organization to connect to customers by using text messages. More information: Try channels for Dynamics 365 Customer Service and Configure an SMS channel

Voice

With the voice channel, Omnichannel for Customer Service provides agents with the ability to receive and make public switched telephone network (PSTN) calls through a native calling experience in Dynamics 365, with real-time AI-powered features such as live call transcription, sentiment analysis, and AI-based suggestions to boost agent productivity. More information: Introduction to the voice channel

Microsoft Teams

Using Microsoft Teams as an engagement channel for support of internal functions—such as technical support, human resources, and finance—allows organizations to connect their employees with internal support personnel by using the Omnichannel

Add-in for Dynamics 365 Customer Service. More information: Configure Microsoft Teams

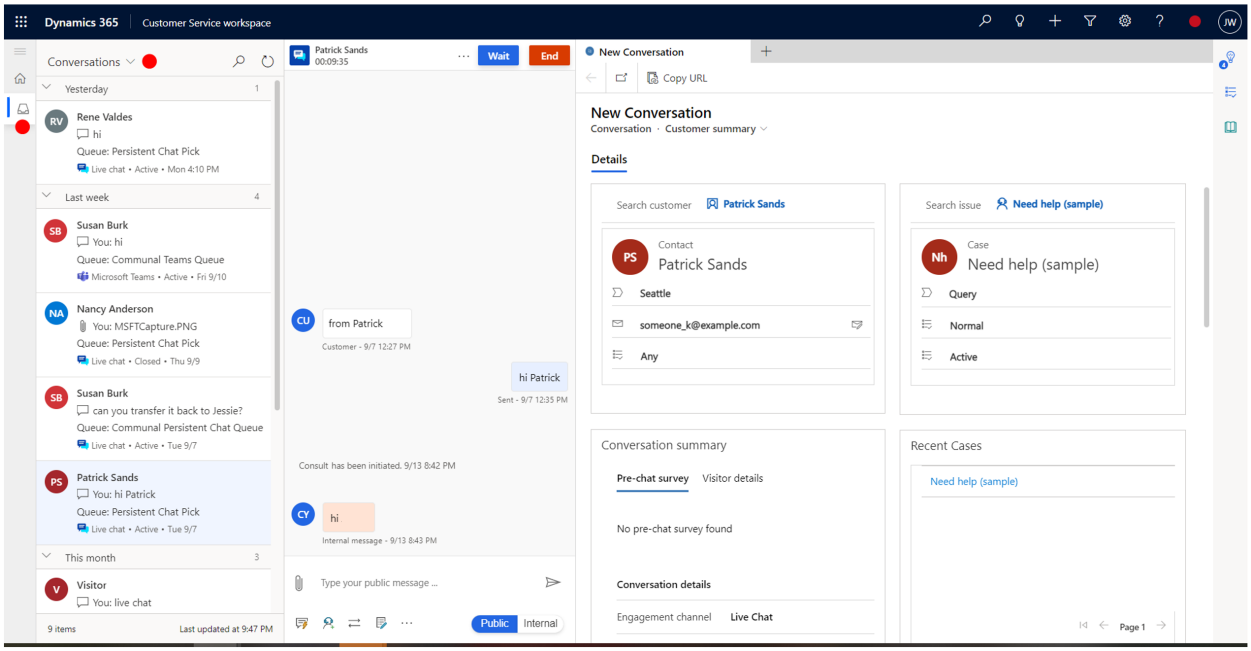
Social channels

Social channels such as Facebook, LINE, and WeChat give you an incredible opportunity to capitalize on the social media trend and engage with your customers in a seamless and personalized experience. In addition to popular social channels, you can create your own custom messaging channel. For more information, see Try channels for Dynamics 365 Customer Service.

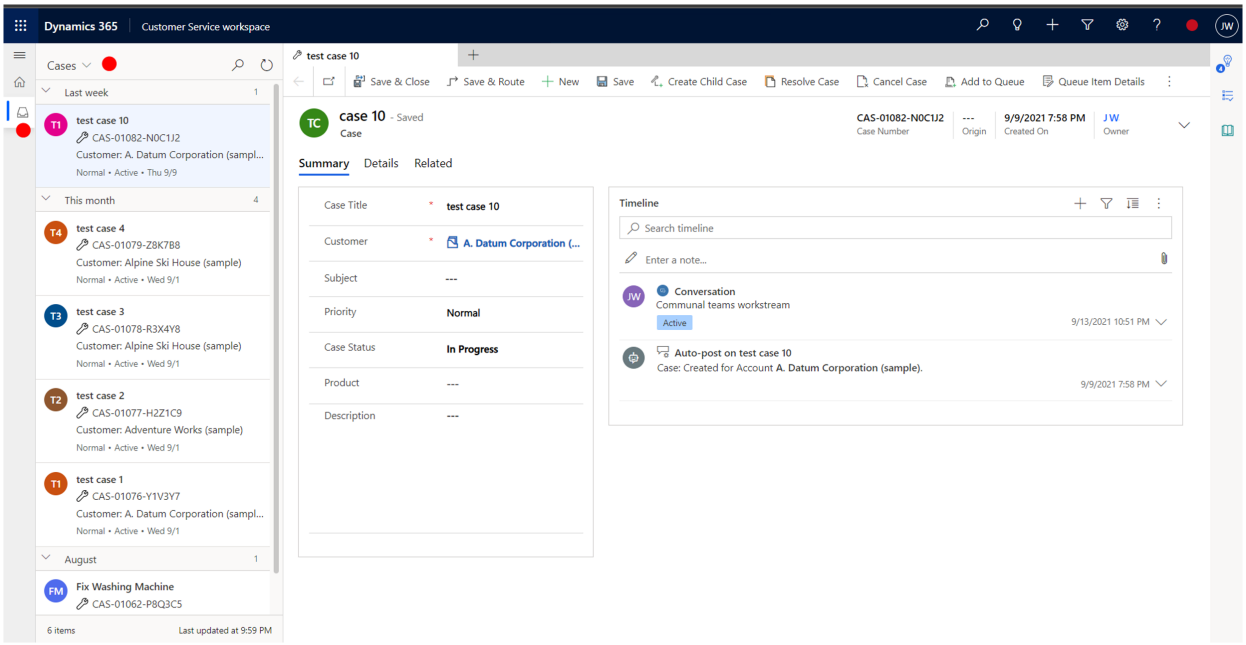
Inbox view

As an agent, when you open Customer Service workspace or Omnichannel for Customer Service, you can select the inbox icon to show all of the cases and conversations that are assigned to you. The inbox is designed to help you efficiently work on high velocity tasks, as well as promote inbox sessions to regular sessions when you need more time to resolve cases and complete your conversations. The following asynchronized channels are available in the conversation inbox: SMS, persistent chat, Facebook, Twitter, WeChat, LINE, WhatsApp, and Teams.

The following image shows the inbox conversation view:



The following image shows the inbox case view:



For information on how to configure the inbox view, see Configure the inbox view in App profile manager.

Videos

Introduction to Omnichannel for Customer Service

To view more videos on Omnichannel for Customer Service, see Videos.

See also

Prerequisites and system requirements
Assign roles and enable users for Omnichannel for Customer Service
Try channels for Dynamics 365 Customer Service
Configure an SMS channel
Configure a Facebook channel
Quickly configure a chat widget
Understand routing
Omnichannel admin center
Agents using Unified Service Desk
Agents using Omnichannel for Customer Service app
System customizers guide
Developer guide

Install demo data for Chat for Dynamics 365 Customer Service

Article • 03/08/2023

This article offers instructions on how to install sample or demo data for Chat for Dynamics 365 Customer Service capabilities to help you build your own demo environments.

The sample data is available as a downloadable demo package, which you can install in your Omnichannel for Dynamics 365 Customer Service demo environment that has the Chat for Dynamics 365 Customer Service add-on.

ⓘ Important

- Once installed, you can't uninstall the demo data.
- The Chat for Dynamics 365 Customer Service demo data is available only in English.
- Install the demo data on a demonstration, evaluation, training, or test environment only and not on production environments.

Prerequisites

The following are required for installing sample data in your target environment:

- A Microsoft Power Platform environment.
- Your base language is English.
- The environment has no Omnichannel for Customer Service data already, or has only the default data that comes with a new environment.
- The environment has Omnichannel for Customer Service provisioned and the Chat channel is enabled.

ⓘ Note

If you need to install the demo data on top of an existing Chat trial or a demo environment that already has data (not recommended), you'll need to suspend the safety prechecks performed by the installer. For more information, see the **Technical notes**.

Download the sample data

Download the demo data from the Download Center and save it on your computer.

Chat for Dynamics 365 Customer Service demo data

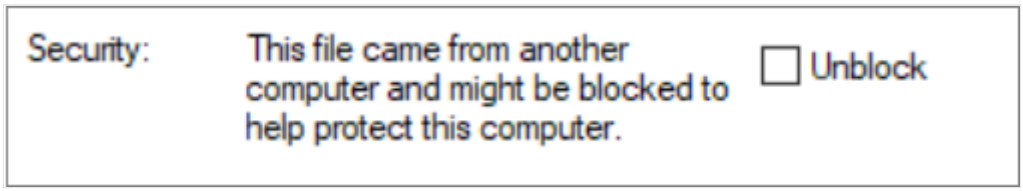
Extract files

The Chat demo data installer is a self-extracting executable file. After you download the demo data, perform the following steps:

1. Run the **.exe** file that you downloaded.
2. Accept terms and conditions to unpack the compressed zip file.
3. Extract the contents of that file to a folder on your computer.

Depending on the operating system and security settings, you might need to perform the following steps after unpacking the zip file:

1. Open the **OmnichannelDemoDataPackage** folder.
2. Right-click the **OmnichannelDemoDataPackage.dll** file and choose **Properties**.
3. Choose **Unblock**.



4. Select **Apply**.
5. Select **OK**.

Set up users

The OmnichannelDemoData package installs a few users such as those listed in the table below. To install the demo data, you need to create (or temporarily rename) users in your Power Platform environment to match the incoming demo data configuration.

First name	Last name	User alias	Email	Role

First name	Last name	User alias	Email	Role
Alex	Allman	alexallman	alexallman@sampleorg.onmicrosoft.com	Omnichannel Supervisor
Lilly	Michael	lillymichael	lillymichael@sampleorg.onmicrosoft.com	System Administrator, Omnichannel Administrator
Penelope	Mayo	penelopemayo	penelopemayo@sampleorg.onmicrosoft.com	Omnichannel Agent

Configure users

1. Sign in to your Power Platform environment.
2. Select **Settings** > **Security** > **Users**.
3. Replace `"Lilly Michael"` with `"lillymichael"` in the `UserFullname="Lilly Michael"` tag. Ensure the username is all lowercase.
4. Select the **Lilly Michael** user. The user page appears.
5. Select **Manage Roles** in the command bar at the top. The **Manage User Roles** dialog box appears.
6. Select the check box for the following role names:
   - **System Administrator**
   - **Omnichannel Administrator**
7. To grant full admin rights to Lilly Michael, select **OK**.

   This ensures that demo data records are created with the correct user ownership and therefore views are populated correctly.
8. Repeat steps 1 through 7 for the other users mentioned in the table.

Update data mapping file

Next you need to update a data mapping file with the email address of the default user context in the downloaded package.

1. Open **PkgFolder**.

2. Open the **usermap.xml** file in Notepad (or another XML editor).
3. Set the `DefaultUserToMapTo=` field to the email address of user Lilly Michael.

   For example: `<MappingConfiguration DefaultUserToMapTo="lilymichael@sampleorg.onmicrosoft.com">`
4. Select **Save**.

> **Tip**
>
> We recommend that you create a backup of your environment so you can revert to the initial stage if you encounter issues during the demo data installation. To learn more, see **Back up and restore instances**.

Run the package deployer

When you install any of the demo data, the following actions occur during the installation process:

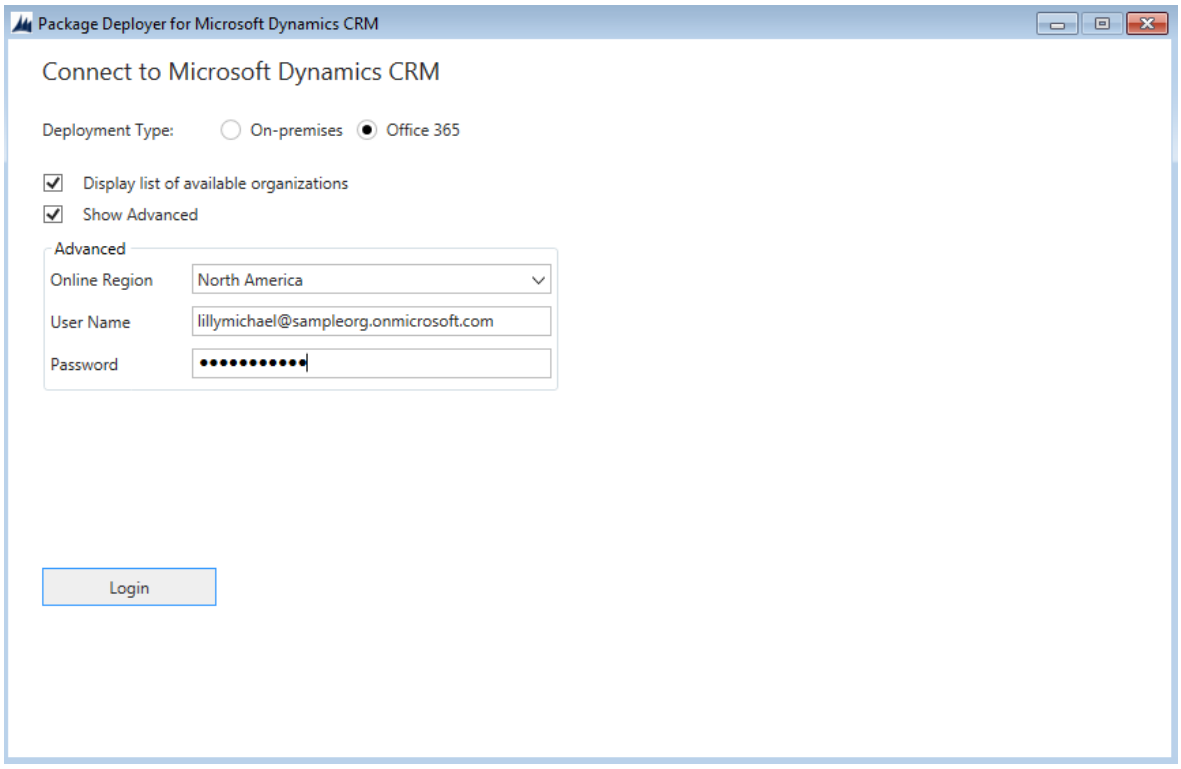
- Default parameters for using Omnichannel for Customer Service are created and/or set.
- Demo data and configuration for the applications are imported (Chat widget, Work Streams, Queues, and other entities) to demonstrate key capabilities.

Wondering what capabilities you can demo with the demo data? See the Fabrikam scenario below.

1. Open the **OmnichannelDemoData** folder.
2. Run **PackageDeployer.exe**.
3. Accept the terms and conditions.
4. Specify the following in the connect screen and select **Login**. In this step, you need to connect to the Power Platform environment where you want to deploy the demo data:

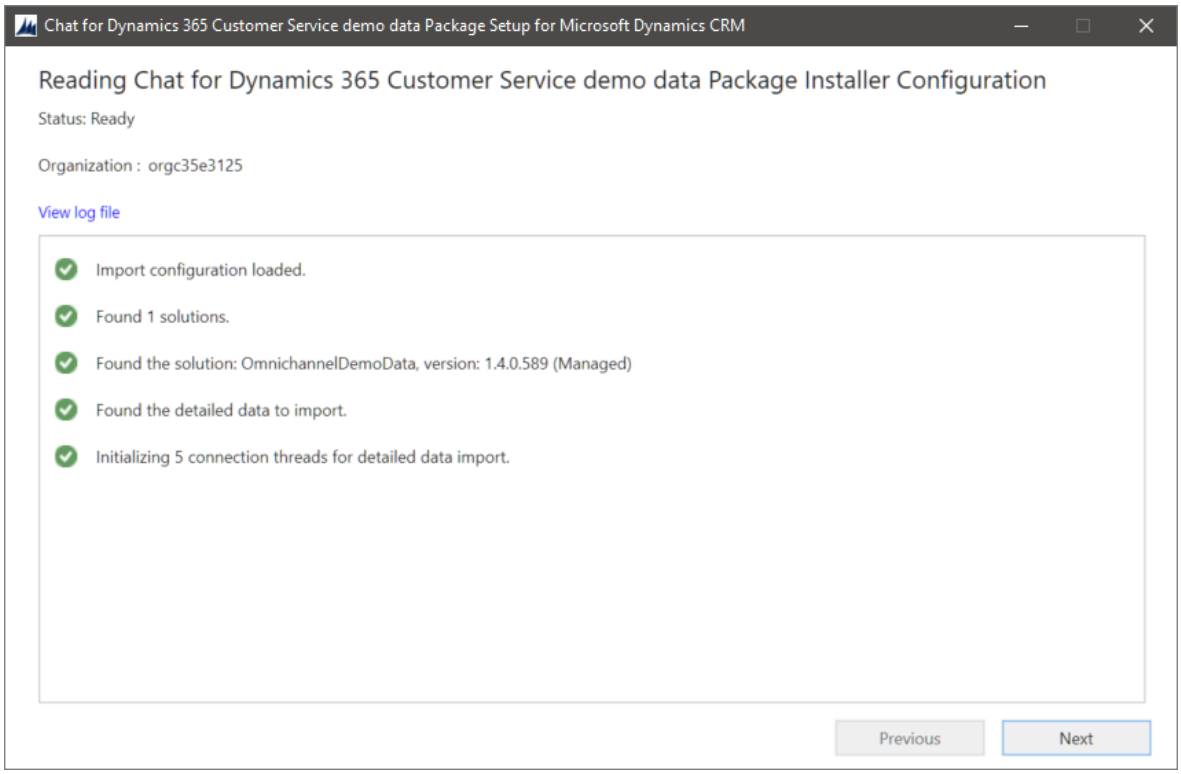
Field	Value	Description
Deployment Type	Microsoft 365	To connect to a Power Platform environment.

Field	Value	Description
Display list of available organizations	Select the check box.	
Show Advanced	Select the check box.	
Online Region	North America	Select the organization that you want to connect to.
User Name	`lilymichael@sampleorg.onmicrosoft.com`	Specify the user name of the system administrator user that you configured in the Configure users section.
Password		Specify the password of the system administrator user that you configured in the Configure users section.

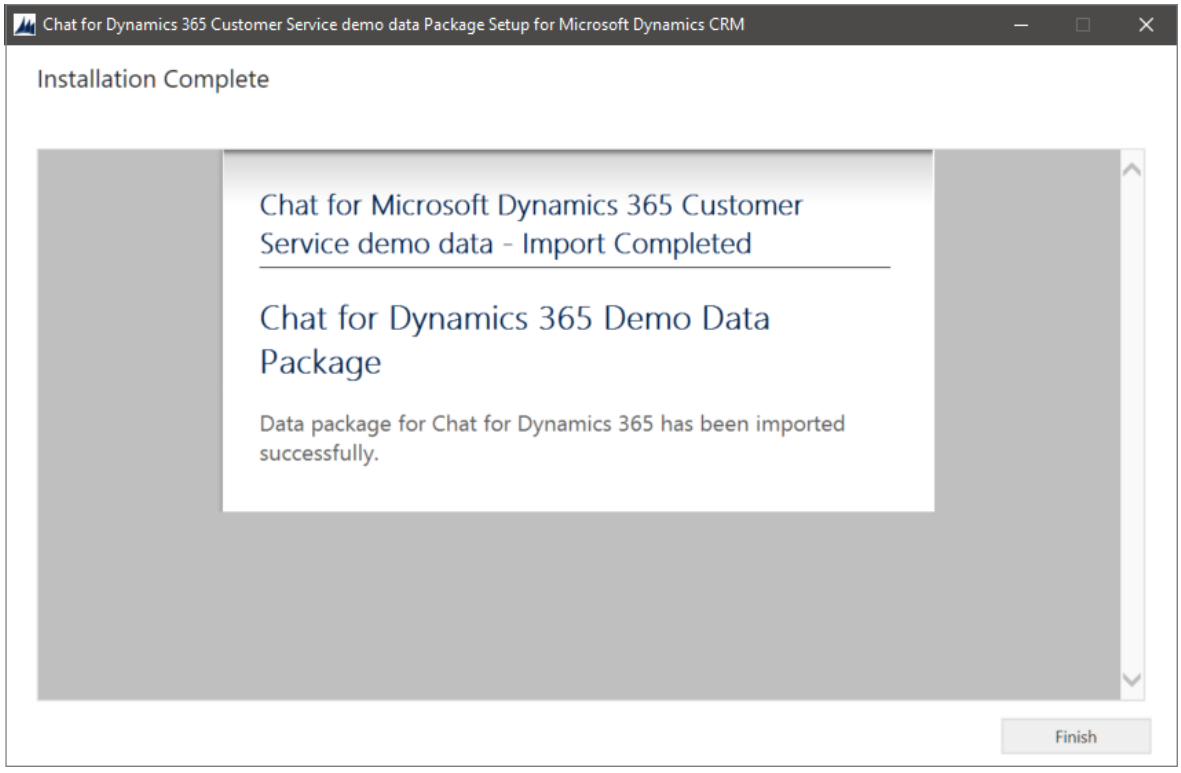


5. Select **Next** in the subsequent screens until you see the **Reading Chat for Dynamics 365 Customer Service demo data Package Installer Configuration** dialog box.

6. To start the demo data installation, select **Next**.



7. After the demo data is installed successfully, select **Finish**.



Verify demo data installation

> **Important**
>
> - Support for the Omnichannel Administration app ended on April 30, 2022. We recommend that you use the Omnichannel admin center or Customer Service

admin center app to configure the latest features, such as unified routing and voice channel. For more information about the deprecation announcement, see Omnichannel Administration app is deprecated.

- Additionally, workstreams that you create in the Omnichannel Administration app can't be modified in the Omnichannel admin center app. You'll need to migrate the existing workstreams and then manage them in the Omnichannel admin center app. More information: **Migrate workstreams created in Omnichannel Administration**

Verify that the number of records and types of entities listed in the **Fabrikam** fictitious scenario appear as expected.

After the demo data completely loads, do the following:

1. Sign in to Omnichannel for Customer Service as the Lilly Michael user.
2. Verify the following:
    - Go to **Omnichannel Administration** > **Queues & Users** > **Users** to confirm the three Omnichannel users are created.
    - Go to **Omnichannel Administration** > **Queues & Users** > **Queues** to confirm the Queue 1 (sample) and Queue 2 (sample) are created.
    - Go to **Omnichannel Administration** > **Channels** > **Chat** to confirm the Portal Chat (sample) is created.
    - Go to **Omnichannel Administration** > **Work Distribution Management** > **Work Streams** to confirm the Chat Push (sample) is created.

Technical notes

Install demo data in an environment that already has data

> ⚠ **Warning**
>
> We recommend that you don't install demo data on top of existing data because to do so, you have to remove safety precautions.

If you must install demo data on top of an existing Omnichannel for Customer Service trial or demo environment that already has data, you'll need to suspend the safety prechecks performed by the installer.

To suspend the safety prechecks, follow these steps:

1. Go to the **PkgFolder** folder.
2. Open the **DemoDataPreImportConfig.xml** file with Notepad (or another XML editor).
3. Set the value of `TerminateOnPreCheckFailure` from true to false.

```
<TerminateOnPreCheckFailure>false</TerminateOnPreCheckFailure>
```

This change causes the installer to skip safety prechecks.

Configuration components

There are several configuration components in this pre-import configuration file. For technical users, these include:

- **<RequiredSolutions>**: Specifies prerequisite solution installations and their version numbers.
- **<InstallSampleData>**: Installs demo data to your Power Platform environment. This is the same demo data that you can install from **Settings** > **Data Management**.
- **<DefaultParameterDescription>**: Specifies the default description for the parameters.

Fabrikam scenario

The fictional company Fabrikam is a manufacturer of an electronic device assembly line of robots and is known for its product quality, innovation, and solid customer service, including: installation planning, implementation, and ongoing maintenance services. Fabrikam is headquartered in the United States (Fabrikam, U.S.), and has Customer Service Support (CSS) operations centered in the United States, primarily in the greater Seattle area. The CSS contact center is focused on providing excellent support experiences to their customers.

A high-level overview of the Chat for Dynamics 365 Customer Service demo data is as follows:

- Three Omnichannel users
- One web customer
- One case
- Four sessions
- One Chat for Dynamics 365 Customer Service workstream
- One Chat widget
- One Omnichannel for Customer Service queue

See also

Try channels in Omnichannel for Customer Service

Quickly configure a chat widget

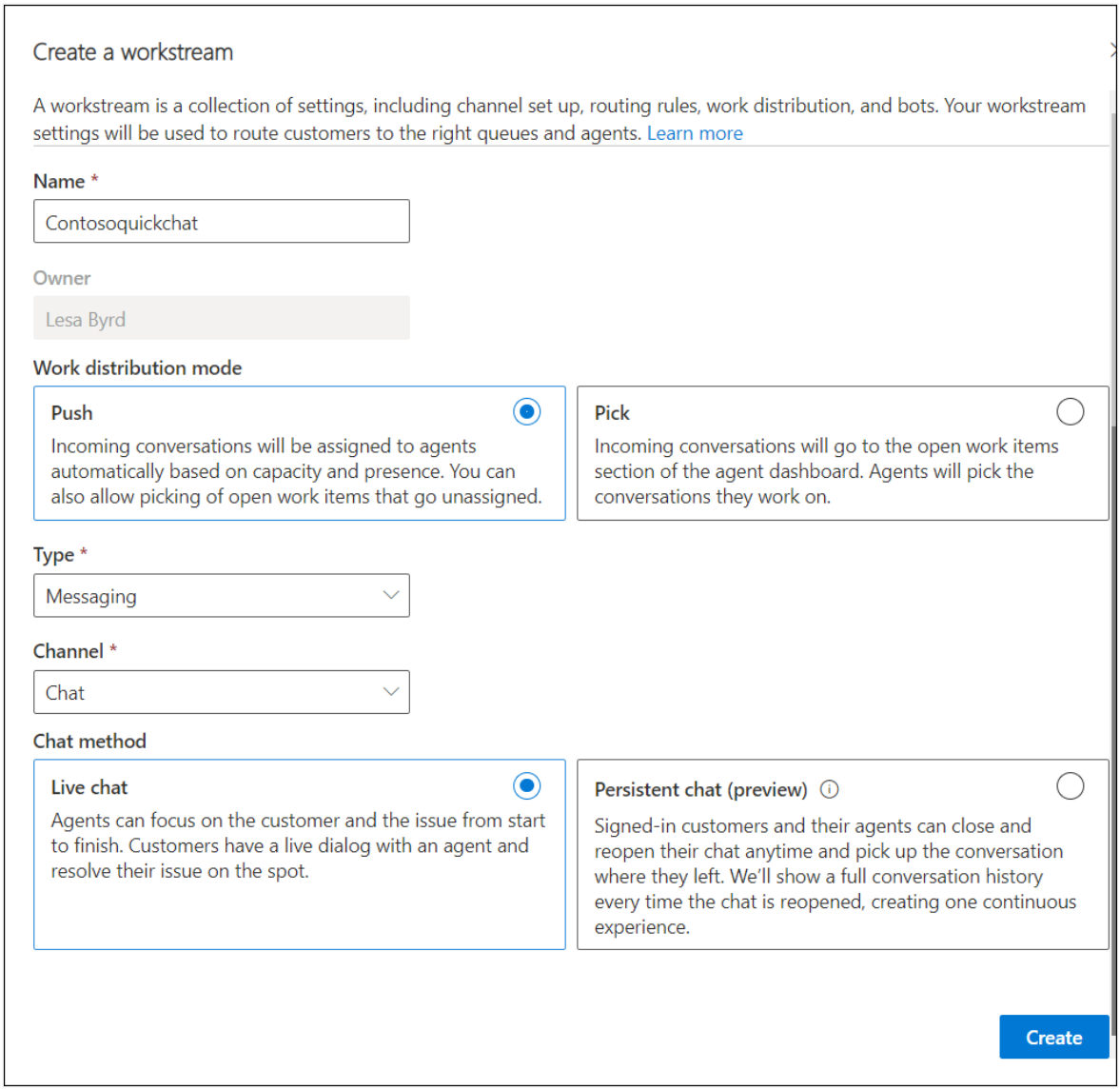
Article • 02/11/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Use the Omnichannel admin center app to quickly configure and add a chat widget to your portal to chat with your website visitors. To configure a chat widget and embed it in portal, you must:

Step 1: Create a workstream for chat

1. Sign in to Dynamics 365, and open the Omnichannel admin center app.
2. In the site map, go to **Workstreams** in **General Settings**, and select **New** from the command bar.
3. On the **Create a workstream** dialog box, do the following:
    - **Name**: Specify a workstream name
    - **Work distribution mode**: Select **Push** or **Pick**.
    - **Type**: Select **Messaging**.
    - **Channel**: Select **Chat**.



4. Select **Create**.

Step 2: Configure a chat widget

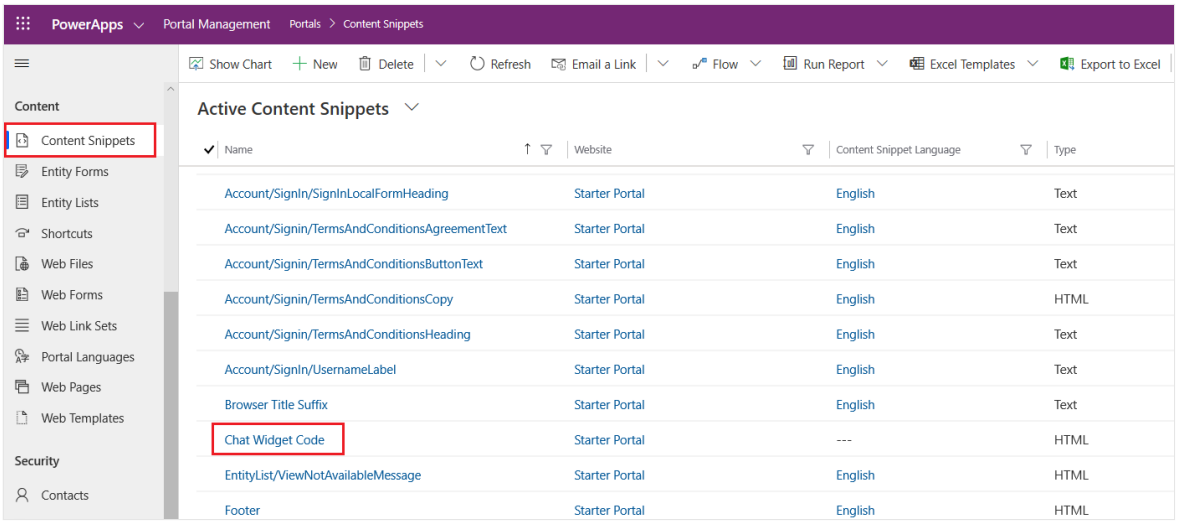
1. On the workstream page that you created, select **Set up chat**.
2. On the **Live chat setup** wizard that appears, enter the details. More information: Configure a chat widget.

Step 3: Embed chat widget in portal

> **Note**
>
> The chat widget requires session storage and local storage to be functional in your customers' browsers. Make sure to notify your customers to enable cookies in their browsers so these services can work properly.

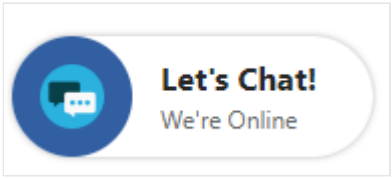
Follow these steps to embed your chat widget into a Power Apps portal. For steps to embed your chat widget into your website, see Embed chat widget in your website or Power Apps portal. For steps to embed your chat widget into mobile experiences, see Render a live chat widget on the mobile app.

1. Open the Portal Management app.
2. Go to **Portal** > **Content Snippets**.
3. Find the **Chat Widget Code** content snippet and open it.

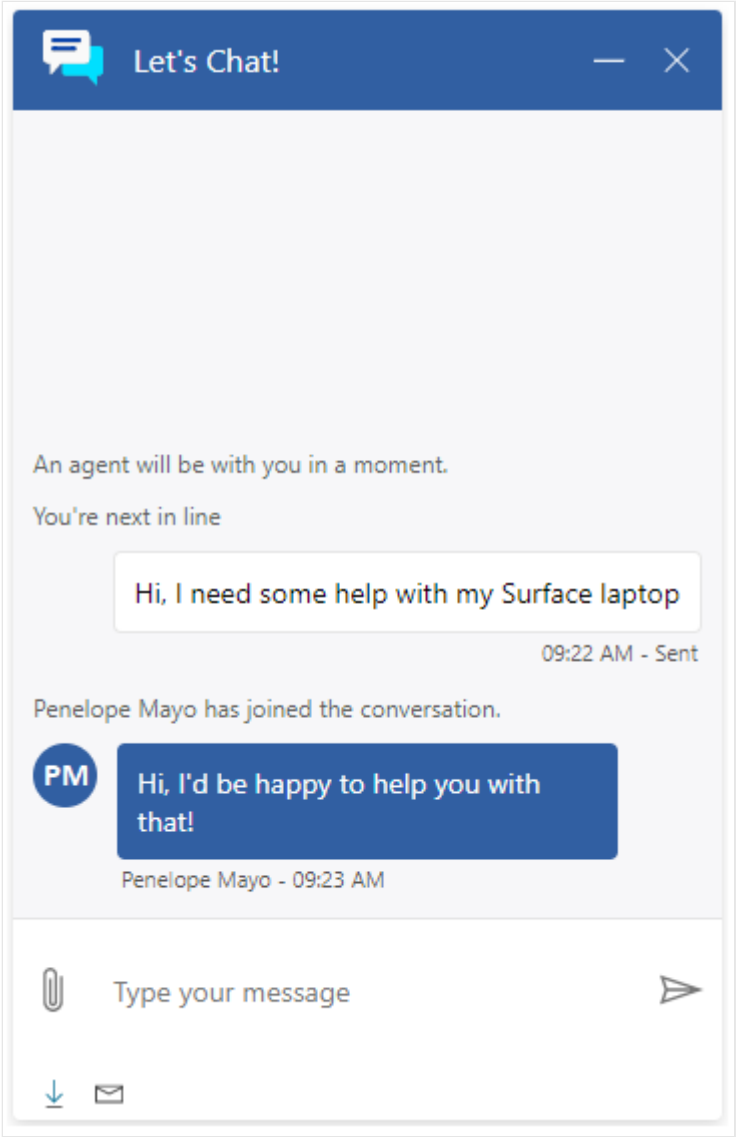


4. On the **General** tab, scroll down to the **Value (HTML)** section.
5. Paste the chat widget snippet code in the **HTML** tab.

6. Save the changes. The chat widget is now embedded into the portal. By default, the chat widget is displayed in minimized mode as follows:



You can maximize the chat widget by selecting it.



See also

create workstreams for unified routing
Configure work classification
Configure a chat widget
Embed chat widget in your website or Power Apps portal
Supported browsers for live chat widget
Render a live chat widget on the mobile app

What's new in Dynamics 365 Customer Service

Article • 09/06/2023

Welcome to Dynamics 365 Customer Service. Visit this page to learn about new or updated features for Customer Service.

What's new in October 2023 update

For information about the features that are releasing in October 2023, see:

2023 release wave 2 plan - Customer Service

What's new in April 2023 update

For information about the features that released in April 2023, see:

2023 release wave 1 plan - Customer Service

See also

User Guide (Customer Service Hub)
Omnichannel for Customer Service

Sign up for a free Dynamics 365 Customer Service trial

Article • 01/11/2023

Dynamics 365 Customer Service offers a 30-day free trial. After a quick sign-up, you'll have access to many of the app's key features. The trial allows you to test the app with sample data and even try out your own customer data. Learn more about what Customer Service has to offer.

To sign up for the trial:

1. Go to the Try Dynamics 365 Customer Service page and select **Try for free**.
2. Follow the onscreen guidance to enter the email associated with your Microsoft account or your personal email ID, such as alansteiner@gmail.com, and your contact information.

> **Note**
>
> - Check the availability of the product in the region you want to try before you sign up for a trial.
> - If you use a personal email ID to sign up for the trial, not all the trial features will be available. More information: **Trial FAQ**

The trial will take a few moments to load, then you can start using Customer Service.

What to try?

The trial environment includes many of the same features as the paid version. The following links will guide you through using some of the key features.

- Understand how agents manage their cases and work on them.
- View AI-suggested cases and knowledge articles for a case.
- Explore the agent dashboard.
- Understand the agent communication pane for conversations.
- Overview of the voice channel.
- Know more about chat notifications.
- View AI-suggested cases and knowledge articles for a conversation.
- View how supervisors monitor agent conversations.

More resources

Trial FAQ
Dynamics 365 Customer Service free trial sign up page
Explore Microsoft Learn training
Watch videos on the product playlist
Try channels in Omnichannel for Customer Service

Dynamics 365 Customer Service trial FAQ

Article • 06/13/2023

This article answers your most frequently asked questions about the free product trial of Customer Service and Omnichannel for Customer Service.

Sign-up

What are the system requirements for the trial?

This app is a cloud-based service that doesn't require special software other than an up-to-date web browser, though some restrictions apply. For the best trial experience, avoid accessing the trial site in incognito mode. Learn more about web application requirements.

How do I sign up for the trial without a Microsoft 365 tenant?

You can enter a non-work email address and we will create an account and tenant for you.

Can I sign up for trial using a personal email ID that's not associated with a Microsoft account?

You can use a personal email ID. But you won't be able to access Power Platform admin center to add more users to the trial, change security roles, or extend the trial period.

Can I sign up for multiple Dynamics 365 apps such as Sales, Marketing, and Customer Service?

Yes, you can. To view all available trials, visit the trial hub page. You can use the same email account to sign up for different trials. However, it is not possible to have multiple apps on the same trial site. Each trial will be on a different tenant and URL. The trial data won’t be shared across apps.

Trial app

I didn't receive the trial details email after signing up, what should I do?

When you sign up for the trial, you'll receive an email with the trial details. If you don't see the email in your inbox, check your spam folder. Alternatively, use the following steps to access your app:

1. Go to trial site and select Try for free.
2. Enter the email ID that you used, to sign up for the trial. You'll be redirected to your trial app.

How do I add more users to a trial?

To add users, go to the Microsoft 365 admin center using the trial admin account. Follow the admin center guidance to add users up to the trial license limit. If the user you are adding already has a Microsoft 365 account, assign them an appropriate security role in the trial org. For more information, see Assign a security role to a user.

How many users can I add to my trial environment?

You can add an unlimited number of users to the trial environment.

How do I reset the trial environment?

You can't reset the trial environment. However, you can wait for the trial period to end and then sign up again for a new trial.

How do I extend the trial?

You can extend the trial for another trial period in the admin center. For instructions, see Extend your trial. You can extend your trial once.

How do I cancel the trial?

If you have signed up for the trial using a managed Azure Active Directory account, you can request your Power Platform admin to delete the trial environment. If you have signed up using your personal account, you cannot cancel the trial manually. The trial

will expire after the 30-day trial period and the trial environment will be automatically deleted.

Can I convert the trial to a paid license?

Yes, you can purchase licenses through direct, credit card purchase at admin.microsoft.com. Or, you can work with sales to establish a volume licensing or enterprise agreement. Visit our Pricing page for more information on pricing and purchasing.

To purchase the license using an existing account, work with the administrator of the account to apply for licenses.

After you've applied for the license to your tenant, you can publish your environment to production. You can remove the sample data. However, you have to manually reset the configuration and remove any test data that you've added. We recommend that you create a fresh environment to use for your production environment and add the configurations you'd like to move forward with.

What are the trial limits and quotas?

The following limitations apply for the trial:

- The trial is available to you for 30 days. After that, you can request for an extension for another 30 days, buy a paid license, or sign up for a new trial.
- The trial will expire if there's no activity on the app for 14 consecutive days. Expired trials can't be reactivated. However, you can start a new trial.
- You can have only one active trial per app at a time. You can sign up again after your current trial for the app ends.

Customer Service-specific questions

What features are available in the trial?

The environment you receive in trial is a fully functional, Power Platform environment with the following out-of-the-box capabilities:

- Dynamics 365 Customer Service Enterprise
  - Customer Service workspace with AI-powered case and knowledge suggestions, knowledge search, and agent scripts with macros for common tasks automation
  - Case management, knowledge management, unified routing, email

- Digital Messaging and Voice Channel for Dynamics 365 Customer Service
  - Chat, voice, and other digital messaging channels
- Power Apps
  - To create app profiles, configure templates, customize the solution
- Dynamics 365 Power Virtual Agents
  - To add Power Virtual Agents bot to chat and channels

  > **Note**
  >
  > If you use a personal email ID for the Customer Service trial, you can't customize the Power Virtual Agents bot. The default Power Virtual Agents bot that's used in scenarios like voice and chat tour will work with the personal email address. However, you can't access the links to customize the bot using the Power Virtual Agents designer.

- Dynamics 365 Customer Voice
  - To add pre and post-conversation surveys in messaging
- Dynamics 365 Power Automate
  - To build customized and automated flows and business processes

More information: Dynamics 365 Customer Service pricing

How do I remove sample data from the trial instance?

Your trial environment is curated to provide you with a fully functional application to ensure you can discover the business value of Customer Service right away. Sample data is available to ensure all features are fully illustrated for you. You can learn how the product works as if it were deployed to many users in your organization and with existing customer interactions. Because it's a real environment, you can manually add or delete individual data records in your trial environment as you want. You can't do a bulk delete of the sample data and configurations from the trial environments.

How do I reset or reimport sample data?

Sample data comes with the trial environment and experience. To get a fresh dataset, you must wait for your trial to expire and start a new trial.

Can I call the trial phone number from outside the US?

No, you can't call the trial phone number because it's a toll-free US number that works within the US only. For more information and a workaround, see Use trial phone number.

Can I use the trial phone numbers for inbound or outbound SMS?

No. The trial phone numbers aren't available for inbound or outbound SMS.

Can I use the trial phone numbers for outbound calls?

No. The trial phone numbers aren't available for outbound calls.

Which geographical regions are supported in the trial version?

For the list of geographical regions supported in Customer Service, see Datacenter regions.

For the list of geographical regions supported in Omnichannel for Customer Service, see International availability. Additionally, the new trial experience isn't supported in Brazil, Government Community Cloud, Norway, and South Africa.

Which languages are supported in the trial version of Omnichannel for Customer Service?

For the list of languages supported in Omnichannel for Customer Service, see Language availability.

See also

Try Customer Service
Overview of Customer Service workspace
Try channels in Omnichannel for Customer Service

Customer Service Learning Catalog

Article • 07/09/2021

Try Dynamics 365 Customer Service for free

Find the right online training, in-person workshops, and events for your role in Dynamics 365 Customer Service.

Business and technical decision makers

Do you decide whether to invest in new technologies?

Business and Technical Decision Makers Learning Catalog

Business users

Did you just get a new application to use?

Business Users Learning Catalog

Get started

Core platform knowlege

Implementation project managers

Are you in charge of making sure your company's implementation goes smoothly?

Project Managers Learning Catalog

Get started

Core platform knowledge

Administrators

Do you need to keep systems and data flowing, provisioned,and secure round-the-clock?

Administrators Learning Catalog

Developers

Do you need to write code to integrate with other data sources, extend core system functionality, or build a complex application?

Developers Learning Catalog

Build

Extend

Functional consultants

Are you an implementation expert for a business domain?

Functional Consultants Learning Catalog

Get started

Core Platform Knowlege

Exams

Partner sales and marketing

Are you responsible for helping your customers buy the right solution?

Partner Sales and Marketing Learning Catalog

Exam

Business and Technical Decision Makers Learning Catalog

Article • 09/21/2022

Do you decide whether to invest in new technologies?

The following catalog is organized from core knowledge to specific domains, and from most basic to most advanced. If content exists in multiple formats, we'll let you know, so that you can choose the training format that best meets your needs.

Getting started

Content	Description	Format	Length
Dynamics 365 and Power Platform Fundamentals	Are you interested in learning about business applications? Start with this learning path to see how Dynamics 365 apps are used. Learn about cloud concepts, Power Platform, and how to get started with Dynamics 365 apps.	Free, self-paced online learning path	5.5 hours
Get started with Dynamics 365 for Customer Service	Customer service is a key aspect of any customer relationship management strategy. Microsoft Dynamics 365 for Customer Service has many features that organizations can use to manage the services they provide to customers.	Free, self-paced online learning path	.5 hours

Business Users Learning Catalog

Article • 09/21/2022

Did you just get a new application to use?

The following catalog is organized from core knowledge to specific domains, and from most basic to most advanced. If content exists in multiple formats, we'll let you know, so that you can choose the training format that best meets your needs.

Getting started

Content	Description	Format	Length
Dynamics 365 and Power Platform Fundamentals	Are you interested in learning about business applications? Start with this learning path to see how Dynamics 365 apps are used. Learn about cloud concepts, Power Platform, and how to get started with Dynamics 365 apps.	Free, self-paced online learning path	5.5 hours
Get started with Dynamics 365 for Customer Service	Customer service is a key aspect of any customer relationship management strategy. Microsoft Dynamics 365 for Customer Service has many features for organizations to manage the services they provide to customers.	Free, self-paced online learning path	0.5 hours

Core platform knowledge

Content	Description	Format	Length
Work with cases in Microsoft Dynamics 365 for Customer Service	This learning path focuses on Case Management capabilities of Dynamics 365 for Customer Service. Find options for creating cases, managing the case resolution process, working with case hierarchies and merging similar cases. Queues can be leveraged to maintain and manage Case workloads for customer service agents. Agents can define queues for different types of cases, manage queue items, pick and release queue items, and design queue routing rules.	Free, self-paced online learning path	3 hours

Content	Description	Format	Length
Work with Knowledge Management Solutions in Microsoft Dynamics 365 for Customer Service	This learning path focuses on working with Knowledge Management Solutions in Microsoft Dynamics 365 for Customer Service.	Free, self-paced online learning path	2 hours
Work with entitlements and service level agreements in Microsoft Dynamics 365 for Customer Service	This learning path focuses on working with entitlements and service level agreements in Microsoft Dynamics 365 for Customer Service.	Free, self-paced online learning path	2 hours

Implementation Project Managers Learning Catalog

Article • 09/21/2022

Are you in charge of making sure your company's implementation goes smoothly?

The following catalog is organized from core knowledge to specific domains, and from most basic to most advanced. If content exists in multiple formats, we'll let you know, so that you can choose the training format that best meets your needs.

Getting started

Content	Description	Format	Length
Dynamics 365 and Power Platform Fundamentals	Are you interested in learning about business applications? Start with this learning path to see how Dynamics 365 apps are used. Learn about cloud concepts, Power Platform, and how to get started with Dynamics 365 apps.	Free, self-paced online learning path	5.5 hours
Get started with Dynamics 365 for Customer Service	Customer service is a key aspect of any customer relationship management strategy. Microsoft Dynamics 365 for Customer Service has many features for organizations to manage the services they provide to customers.	Free, self-paced online learning path	0.5 hours

Core platform knowledge

Content	Description	Format	Length
Work with cases in Microsoft Dynamics 365 for Customer Service	This learning path focuses on Case Management capabilities of Dynamics 365 for Customer Service. Capabilities include options for creating cases, managing the case resolution process, working with case hierarchies and merging similar cases. Queues can be leveraged to maintain and manage Case workloads for customer service agents. Agents can include defining queues for different types of cases, manage queue items, pick and releasing queue items, and design queue routing rules.	Free, self-paced online learning path	3 hours

Content	Description	Format	Length
Work with Knowledge Management Solutions in Microsoft Dynamics 365 for Customer Service	This learning path focuses on Knowledge Management Solutions in Microsoft Dynamics 365 for Customer Service.	Free, self-paced online learning path	2 hours
Work with entitlements and service level agreements in Microsoft Dynamics 365 for Customer Service	This learning path focuses on entitlements and service level agreements in Microsoft Dynamics 365 for Customer Service.	Free, self-paced online learning path	2 hours

Administrators Learning Catalog

Article • 09/21/2022

Do you need to keep systems and data flowing, provisioned, and secure round-the-clock?

The following catalog is organized from core knowledge to specific domains, and from most basic to most advanced. If content exists in multiple formats, we'll let you know. You can choose the training format that best meets your needs.

Getting Started

Content	Description	Format	Length
Implementing Dynamics 365 Customer Engagement Online	Create, design, and administer Microsoft Dynamics 365 Customer Engagement tenants and instances, including planning for multi-instance deployments, managing authentication methods, managing updates, backup and restore instances, install and manage Microsoft Dynamics 365 clients for end-users, and authorizing access to different features for all users in the organization.	Free, self-paced online learning path	5 hours 5 minutes
Manage permissions and administration for Common Data Service	Do you need to manage user access rights? In this learning path, you'll learn how to manage permissions associated with environments and entities. You'll also learn about different administrative portals and how to access each.	Free, self-paced online learning path	1 hour 23 minutes
Introduction to configuration in Dynamics 365 model-driven apps	One of the key features of a Dynamics 365 model-driven app is its ability to be extended and customized without code. In this learning path, we'll explore the Power Platform's configuration abilities and how to use them for a model-driven app.	Free, self-paced online learning path	1 hour
Connect and engage with customers with Omnichannel for Dynamics 365 Customer Service	Developing and deploying true omnichannel solutions are critical to the success of any organization that provides customer service to its customers. By ensuring the unified and contextual experience regardless of the channel used, organizations can increase customer satisfaction, resolve issues faster, and increase revenue. With Dynamics 365's Omnichannel for Customer Service solution, organizations deploy a true Omnichannel solution that exists inside the Dynamics 365 organization that they use every day.	Free, self-paced online learning path	3 hours 30 minutes

Developers Learning Catalog

Article • 09/21/2022

Do you need to write code to integrate with other data sources, extend core system functionality, or build a complex application?

The following catalog is organized from core knowledge to specific domains, and from most basic to most advanced. If content exists in multiple formats, we'll let you know, so that you can choose the training format that best meets your needs.

Build

Content	Description	Format	Length
Introduction to developing with the Power Platform	So, you want to be a Power Platform developer! This learning path is the first step in learning about the platform, tools, and the ecosystem of the Power Platform.	Free, self-paced learning path	2.5 hours

Extend

Content	Description	Format	Length
Extending the Power Platform user experience Model Driven apps	Create client scripting, perform common actions with client script, and automate business process flow with client script is covered in this learning path. Learn about what client script can do, rules, and maintaining scripts. Discover when to use client script as well as when not to use client script.	Free, self-paced learning path	3.5 hours
Extending the Power Platform Microsoft Dataverse	Getting started with extending the Power Platform Dataverse can be overwhelming. This learning path looks at the tools and resources needed for extending the Power Platform. We'll start with looking at the SDKs, the extensibility model, and event framework. This learning path also covers when to use plug-ins. Configuration of plug-ins as well as registering and deploying plug-ins.	Free, self-paced learning path	2 hours

Content	Description	Format	Length
Extend Dynamics 365 portals	The ability to easily surface and interact with Dataverse data on an externally facing web site is the core benefit for implementing a Dynamics 365 portal. This learning path describes how to transform a content portal into a full web app interacting with Dataverse. We will explain how to secure data access based on the authenticated user role and relationship to the data. We will also cover the options available to customizers and developers to extend the portal functionality and integrate with Microsoft 365 and Power platform components.	Free, self-paced learning path	2.5 hours

Exam

Exam	Description
Exam MB-400: Microsoft Power Apps + Dynamics 365 Developer	Take this exam if you are a developer who works with Microsoft Power Apps model-driven apps in Dynamics 365 to design, develop, secure, and extend a Dynamics 365 implementation.

Functional Consultants Learning Catalog

Article • 09/21/2022

Are you an implementation expert for a business domain?

The following catalog is organized from core knowledge to specific domains, and from most basic to most advanced. If content exists in multiple formats, we'll let you know, so that you can choose the training format that best meets your needs.

Getting started

Content	Description	Format	Length
Dynamics 365 and Power Platform Fundamentals	Are you interested in learning about business applications? Start with this learning path to see how Dynamics 365 apps are used. Learn about cloud concepts, Power Platform, and how to get started with Dynamics 365 apps.	Free, self-paced online learning path	5.5 hours
Get started with Dynamics 365 for Customer Service	Customer service is a key aspect of any customer relationship management strategy. Microsoft Dynamics 365 for Customer Service has many features for organizations to manage the services they provide to customers.	Free, self-paced online learning path	.5 hours

Core platform knowledge

Content	Description	Format	Length
Work with cases in Microsoft Dynamics 365 for Customer Service	This learning path focuses on Case Management capabilities of Dynamics 365 for Customer Service. Options are included for creating cases, managing the case resolution process, working with case hierarchies and merging similar cases. Queues can be leveraged to maintain and manage Case workloads for customer service agents. Agents can define queues for different types of cases, manage queue items, pick and release queue items, and design queue routing rules.	Free, self-paced online learning path	3 hours

Content	Description	Format	Length
Work with Knowledge Management Solutions in Microsoft Dynamics 365 for Customer Service	This learning path focuses on Knowledge Management Solutions in Microsoft Dynamics 365 for Customer Service.	Free, self-paced online learning path	2 hours
Work with entitlements and service level agreements in Microsoft Dynamics 365 for Customer Service	This learning path focuses on entitlements and service level agreements in Microsoft Dynamics 365 for Customer Service.	Free, self-paced online learning path	2 hours

Exam

Content	Description	Format	Length
Exam MB-200: Microsoft Dynamics 365 Customer Engagement Core	This exam measures your ability to accomplish the following technical tasks: perform discovery, planning, and analysis; manage user experience design; manage entities and data; implement security; implement integration; and perform solutions deployment and testing.	Exam, cost varies by region	
Exam MB-230: Microsoft Dynamics 365 for Customer Service	This exam measures your ability to accomplish the following technical tasks: perform configuration; manage cases and the knowledge base; manage queues, entitlements, and SLAs; and configure voice of the customer.	Exam, cost varies by region	
Dynamics 365 Fundamentals	Prove that you understand Microsoft Dynamics 365: the Power Platform; cloud concepts; licensing options; and deployment and release options.	Exam, cost varies by region	

Microsoft Sales and Marketing Learning Catalog

Article • 09/21/2022

Are you responsible for helping your customers buy the right solution?

The following catalog is organized from core knowledge to specific domains, and from most basic to most advanced. If content exists in multiple formats, we'll let you know, so that you can choose the training format that best meets your needs.

Getting started

Content	Description	Format	Length
Dynamics 365 and Power Platform Fundamentals	Are you interested in learning about business applications? Start with this learning path to see how Dynamics 365 apps are used. Learn about cloud concepts, Power Platform, and how to get started with Dynamics 365 apps.	Free, self-paced online learning path	5.5 hours
Get started with Dynamics 365 for Customer Service	Customer service is a key aspect of any customer relationship management strategy. Microsoft Dynamics 365 for Customer Service has many features that organizations can use to manage the services they provide to customers.	Free, self-paced online learning path	.5 hours

Exam

Content	Description	Format	Length
Dynamics 365 Fundamentals	Prove that you understand Microsoft Dynamics 365: the Power Platform; cloud concepts; licensing options; and deployment and release options.	Exam, cost varies by region	

System requirements for Customer Service Hub

Article • 09/20/2022

The Customer Service Hub's intuitive interface brings together vital information in one place, so you can focus on the things that matter.

Supported browsers and mobile devices

The following browsers are supported:

- Google Chrome
- Microsoft Edge (supported on Windows 10)
- Apple Safari 11
- Internet Explorer 11

> **Note**
>
> Support for Internet Explorer 11 is deprecated. We recommend that you use Microsoft Edge. More information: **Deprecation announcement**

The following mobile devices and operating systems are supported:

- **iOS 10:** Tablet and phone
- **Android:** Tablet and phone (Android 6 and 7)
- Windows 10

System requirements for Customer Service workspace

Article • 08/09/2023

This article provides information about the prerequisites and system requirements for using Customer Service workspace in your organization.

Prerequisites

This section lists the prerequisites for using Customer Service workspace.

Licensing

An active subscription to Microsoft Dynamics 365 Customer Service Enterprise in your tenant for each user.

Software requirements

Area	Requirements
Model-driven app	Dynamics 365 Customer Service workspace app 9.2.0000.00000.
Web browsers	Supported browsers: • Microsoft Edge; latest three major releases • Google Chrome; latest three major releases

Hardware requirements

Area	Requirements
RAM	A minimum of 4 GB
Latency	Not more than 150 milliseconds
Throughput	A minimum of 4 Mbps

For more requirements, see Model-driven app requirements.

Important

To use the omnichannel capabilities, you'll need a higher network bandwidth. For more information, see: **Omnichannel for Customer Service system requirements**

Limitations

- Customer Service workspace isn't supported in mobile devices, Unified Service Desk, and with Dynamics 365 Customer Engagement (on-premises).

See also

Introduction to Customer Service workspace

Omnichannel for Customer Service system requirements

Article • 09/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article provides information about the prerequisites and system requirements for deploying Omnichannel for Customer Service in your organization.

You can deploy Omnichannel for Customer Service over a Customer Service application and use it in the following ways:

- Omnichannel for Customer Service app - Web experience on the Unified Interface application
- Unified Service Desk client application

Prerequisites

This section lists the prerequisites for using Omnichannel for Customer Service.

International availability

Make sure that Omnichannel for Customer Service is available in your region. More information: International availability

Licensing

- You must have an active subscription to Microsoft Dynamics 365 Customer Service Enterprise or Dynamics 365 Customer Engagement Plan in your tenant for each user of Digital Messaging or Chat for Dynamics 365 Customer Service.
- For each chat channel user, you must have an active subscription to the **Dynamics 365 Customer Service Digital Messaging add-on** for each Digital Messaging user or **Chat for Dynamics 365 Customer Service**.

- For each voice channel user, you must have an active subscription to **Dynamics 365 Customer Service Voice Channel Add-in** or **Dynamics 365 Customer Service Digital Messaging and Voice Add-in**. For information on purchasing add-ins, see Buy an add-on.

For more information about licenses and pricing, see the Dynamics 365 licensing guide.

System requirements for Omnichannel for Customer Service

The system requirements to use Omnichannel for Customer Service are as follows. These requirements might vary depending on your configuration size and the applications that you run.

Area	Requirements
Model-driven app	Dynamics 365 Customer Service app 9.2.21034.00160 or later.
Web browsers	Supported browsers: • Microsoft Edge (Chromium based); version 79.0.309.65 or later is required for the desktop notifications feature. • Google Chrome **Important** Omnichannel for Customer Service uses third-party cookies for authentication. Make sure that the cookies are not blocked in your browser in any mode so that certain services, such as agent or supervisor presence, can work properly.
Azure Communication Services	Required for 1st party voice and SMS in the voice channel in production environments. For requirements specific to Azure Communication Services, see Network recommendations.
Hardware	• Microphone and speakers for the voice experience. • **Minimum:** 4 GB of RAM
Internet bandwidth for voice and video	• **Minimum:** 4 Mbps upload speed; 8 Mbps download speed • **Recommended:** 8 Mbps upload speed; 16 Mbps download speed

For other hardware and software requirements, see Model-driven app requirements.

Supported web browsers for voice and video in live chat widget

The following browsers are supported by the customer-facing live chat widget that you'll display on your portal:

- **Windows:** Chromium-based browser such as Microsoft Edge, Google Chrome, and Mozilla Firefox
- **macOS and iOS:** Safari
- **Android:** Chromium-based browser such as Microsoft Edge and Google Chrome

Provision Omnichannel for Customer Service

To enable the Omnichannel for Customer Service app in your org, see Provision Omnichannel for Customer Service.

To upgrade Omnichannel for Customer Service, see Upgrade Omnichannel for Customer Service.

> ⓘ **Note**
>
> - Omnichannel for Customer Service is not supported with Dynamics 365 Customer Engagement (on-premises).
> - Omnichannel for Customer Service is supported only on desktops, and not on phones and tablets.
> - We recommend that you use browsers in normal mode to optimally experience the Omnichannel for Customer Service app.

Allow access to websites

If your organization uses a URL filter to block a category of websites or URLs, ensure that you allow the following websites as an exception for your users so they can access the Omnichannel for Customer Service app on the business portal.

- `https://*.communication.azure.com`
- `https://login.microsoft.net`
- `https://login.microsoftonline.com`
- `https://login.windows.net`
- `https://browser.pipe.aria.microsoft.com`
- `https://*.teams.microsoft.com`
- `https://plat.teams.microsoft.com`
- `https://authsvc.teams.microsoft.com`

- `https://*.ng.msg.teams.microsoft.com`
- `https://*.notifications.teams.microsoft.com`
- `https://*.trouter.teams.microsoft.com`
- `https://ecs.office.com`
- `https://*.skype.com`
- `https://*.trouter.skype.com`
- `https://*.edge.skype.com`
- `https://aad.skypetoken.skype.com`
- `https://config.edge.skype.com`
- `https://edge.skype.com`
- `https://api.aps.skype.com`
- `https://*.asm.skype.com`
- `https://*.omnichannelengagementhub.com`
- `https://ocsdk-prod.azureedge.net`
- `https://*.service.signalr.net`

If your customers are using a URL filter to block a category of websites or URLs, you might have to ask your customers to allow a specific website as an exception. Your customers must allow access to the following URLs from their browsers to use the live chat widget in the portal.

- `https://*.communication.azure.com`
- `https://*.teams.microsoft.com`
- `https://plat.teams.microsoft.com`
- `https://*.ng.msg.teams.microsoft.com`
- `https://*.notifications.teams.microsoft.com`
- `https://*.trouter.teams.microsoft.com`
- `https://ecs.office.com`
- `https://*.skype.com/*`
- `https://*.asm.skype.com`
- `https://browser.pipe.aria.microsoft.com`
- `https://oc-cdn-ocprod.azureedge.net/livechatwidget`
- `https://cdn.botframework.com/botframework-webchat`
- `https://*.omnichannelengagementhub.com`
- `https://ocsdk-prod.azureedge.net`

Geo-specific links

Location-specific links that should be made accessible are as follows.

Geographic location	Links
North America	`oc-cdn-ocprod.azureedge.net/*`
Europe	`oc-cdn-public-eur.azureedge.net/*`
South America	`oc-cdn-public-sam.azureedge.net/*`
United Kingdom	`oc-cdn-public-gbr.azureedge.net/*`
Japan	`oc-cdn-public-jpn.azureedge.net/*`
Asia Pacific	`oc-apj-public-eur.azureedge.net/*`
Canada	`oc-cdn-public.azureedge.net/*`
India	`oc-cdn-public-ind.azureedge.net/*`
Asia-Pacific and Japan	`oc-cdn-public-apj.azureedge.net/*`
Australia	`oc-cdn-public-oce.azureedge.net/*`
France	`oc-cdn-public-fra.azureedge.net/*`
United Arab Emirates	`oc-cdn-ocuae-uae.azureedge.net/*`

Government Community Cloud (GCC)

The Government community cloud links that should be made accessible are as follows.

- `https://*.communication.azure.us`
- `https://ocprodocprodnamgs.blob.core.usgovcloudapi.net`
- `https://*.omnichannelengagementhub.us/*`
- `https://oc-auth.azurewebsites.us`
- `https://swc.cdn.skype.com/*`
- `https://config.edge.skype.com/*`
- `https://*.gcc.teams.microsoft.com`
- `https://api.ams.gcc.teams.microsoft.com/*`
- `https://browser.pipe.aria.microsoft.com/*`

See also

Introduction to Omnichannel for Customer Service
Get started with Customer Service admin center
Agents using Unified Service Desk

Agents using Omnichannel for Customer Service

Best practices for setting up the voice channel

System customizer guide

Service quotas

Article • 10/18/2023

Service quotas are the limits on resources, configurations, and items that are provided as part of Omnichannel for Customer Service. The tables that follow describe the service quotas and whether they can be adjusted for Dynamics 365 Customer Service Voice Channel Add-in and Dynamics 365 Customer Service Digital Messaging and Voice Add-in subscriptions.

> **Note**
>
> - All limits are at an organizational level for licensed organizations. The limits don't apply to trial or other non-licensed organizations.
> - If you need a higher limit on a measure that's indicated as adjustable, contact Microsoft Support to check whether the limit can be increased.

Configuration limits

Measure	Description	Default limit per channel or submeasure	Adjustable?
Intake rules	Maximum number of intake rules	100 for records	No
Route-to-queue rules	Maximum number of route-to-queue rulesets and rules per workstream	100 for rules	No
Classification rules	Maximum number of classification rulesets and rules per workstream	10 rulesets	No
		100 rules per ruleset	No

Conversation limits

Measure	Description	Default limit per channel or submeasure	Adjustable?
Message size	Maximum size of a single message payload including metadata like timestamps, tags, and links	Approximately 28 KB for any messaging channel	No

Measure	Description	Default limit per channel or submeasure	Adjustable?
Incoming conversations or work items	Maximum rate of incoming conversations per minute, aggregated across channels	Total of 25 incoming conversations or work items per minute[1] for voice, live chat, digital messages, and record channels	Yes
	Maximum rate of incoming conversations per minute by channel	• Voice - 7 per minute[2] • Live chat - 20 per minute • Record - 25 per minute • Social and Direct Line - 20 per minute[2]	Yes

> **Note**
>
> For application limits for channels with third-party integrations like SMS integration through Twilio or TeleSign, see the third-party documentation.

Miscellaneous limits

Measure	Description	Default limit per channel or submeasure	Adjustable?
Bulk user provisioning	Number of users that can be added using role attachment in a single update	500 per 15 minutes[2] **Note**: You can add up to 500 users in a single update that takes 15 minutes for provisioning	Yes
Bulk user updates	Number of users with attributes like skills, capacity profiles, and queue membership that can be edited in a single bulk update	25 users per bulk update[2]	Yes
Bulk user calendar or schedule updates	Number of users whose calendars can be updated in bulk	500 per 15 minutes[2]	Yes
Dataverse Storage Entitlement (aggregated at tenant level)	Microsoft Dataverse storage entitlement based on license; includes SQL/DB, file,	32 GB of base storage per tenant[3] 2.25 GB of extra storage	Other Dataverse storage can be purchased

Measure	Description	Default limit per channel or submeasure	Adjustable?
	and log storage in Dataverse More information: Dynamics 365 licensing guide	per Customer Service license per user[4] 35 GB of extra file storage for the Voice Channel Add-in per user	
Time for configuration updates to take effect, including channel and routing settings and updates to agent skills, capacity profile, and calendar	Maximum time for configuration changes to reflect in the user experience	15 minutes	No.
Block size per assignment cycle	Maximum number of unassigned conversations or work items picked per assignment cycle per queue	• 100 digital messaging or voice conversations[5] • 2000 records-related work items prioritized and assigned in blocks of 500[5]	Yes.
Updates to a routed record	Number of actions per minute like resolve a case, queue transfer, agent transfer, queue item delete that can be done for routed records.	25 updates per minute per organization.	Yes.

[1] To get quality service in a channel, ensure that you don't exceed the defined limit for that channel. When multiple channels are in use, the total conversations per minute should remain under the overall limit of 25. For example, with 5 voice calls per minute, 15 live chat sessions per minute, and 10 digital messages, the total limit is considered to be 25. Any conversation coming in after the 25th item, irrespective of the channel, might reduce the service quality.

[2] These are recommended limits beyond which system reliability and performance might decrease.

[3] 10 GB of SQL/DB storage, 20 GB of file storage, and 2 GB of log storage

[4] 250 MB of SQL/DB storage and 2 GB of file storage

[5] If eligible agents aren't available to serve the default block size of top priority conversations, then the auto assignment process can appear to be paused. In such cases, we recommend that you use features like overflow management to manage high load or review agent availability, scheduling, and skill configuration to expand the eligible agent pool. If these options aren't adequate, contact Microsoft Support with your business scenario to check whether the block size can be increased.

Next steps

System requirements for Omnichannel for Customer Service
System requirements for Customer Service workspace
Provision Omnichannel for Customer Service
Provision unified routing for Customer Service

Best practices for setting up the voice channel

Article • 08/18/2023

Use the information in this article to set up the hardware and software for an optimal performance of the voice channel in Omnichannel for Customer Service. The requirements might vary based on the overall configuration and size of your contact center.

Hardware configuration

For optimized voice communication, make sure of the following settings:

- **Network configuration**: A stable Internet connection is crucial for uninterrupted calls. Use a wired Ethernet connection or a stable wireless network with sufficient bandwidth. For minimum and recommended bandwidth speeds, see system requirements.
- **Compatible headsets**: For clear communication, use USB headsets with noise-canceling microphones. If you rely on laptop speakers and microphone, you're likely to experience background noise in calls and meetings.
- **Use devices correctly**:
  - Test your microphone and speaker settings.
  - Place your microphone close to your mouth to capture your voice clearly. Adjust the sensitivity to remove unwanted echo.
  - Adjust speaker volume to a comfortable level to prevent audio distortion.
  - Minimize background noise.

Software configuration

The software settings to ensure seamless integration are as follows:

Firewall and security: Add the URLs and IP addresses to the allowlist to allow communication between your system and the Omnichannel servers and prevent any security-related issues during your interactions. Make sure that the firewall configuration aligns with the guidelines in Azure Communication Services.

See also

Network recommendations

International availability of Omnichannel for Customer Service

Article • 10/10/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The purpose of this document is to provide information about the geographic location and language availability of live chat and digital messaging channels.

> **Note**
>
> For information about the supported regions and languages in the voice channel, see **Supported cloud locations, languages, and locale codes**.

Geographic location availability

Your Microsoft 365 tenant must be co-located in one of the following geographic locations where Omnichannel for Customer Service is available. These geographic locations refer to your Microsoft 365 tenant only and not the data center where your Power Platform environment or org instance resides.

> **Note**
>
> In the Europe and Asia Pacific regions, Omnichannel for Customer Service is currently not available in a tenant that's located in Norway, Sweden, and Singapore.

See the following table for the availability of the channels in the supported geographical regions.

Region	All messaging channels
Asia Pacific	✓
Australia	✓

Region	All messaging channels
Canada	✓
Europe	✓
France	✓
Germany	✓
Government Community Cloud (GCC)[1]	✓
India	✓
Japan	✓
North America	✓
South America	✓
Switzerland	✓
United Arab Emirates (UAE)	✓
United Kingdom	✓

[1] The Apple Messages for Business, Google's Business Messages, and Microsoft Teams channels aren't available in GCC.

Language availability

The product user interface (UI) is available in the following languages.

Language	Language	Language
Arabic	Greek	Romanian
Basque	German	Russian
Bulgarian	Hebrew	Serbian (Cyrillic)
Catalan	Hindi	Serbian (Latin)
Chinese	Hungarian	Slovak
Chinese (Hong Kong SAR)	Indonesian	Slovenian
Chinese (Simplified)	Italian	Spanish
Croatian	Japanese	Swedish

Language	Language	Language
Czech	Kazakh Thai	Thai
Danish	Korean	Turkish
Dutch	Latvian	Ukrainian
English	Lithuanian	Vietnamese
Estonian	Malay (Malaysia)	
Finnish	Norwegian	
French	Polish	
Galician	Portuguese	

To know the languages that are supported in analytics, see Multilingual sentiment.

See also

Prerequisites and system requirements of Omnichannel for Customer Service
Introduction to channels in Omnichannel for Customer Service

Dynamics 365 Customer Service and Dynamics 365 US Government availability

Article • 02/17/2022

Microsoft strives to maintain functional parity between our commercially available service and that which services Dynamics 365 US Government GCC and GCC High environments.

For more information about Dynamics 365 US Government feature availability, visit this article: Dynamics 365 US Government - Feature availability

Accessibility in Dynamics 365

Article • 03/21/2023

Dynamics 365 is committed to inclusive design and accessible products and content that boost every user's productivity. Use this page to find accessibility content for Dynamics 365 apps, add-ins, or additional resources. For example, learn about keyboard shortcuts, screen readers, and high-contrast settings.

Accessibility features

Use the following links to learn about accessibility features in Dynamics 365 apps:

Customer engagement apps

For customer engagement apps, such as Dynamics 365 Sales and Dynamics 365 Field Service, see the following articles:

- Use a screen reader with Unified Interface apps
- Keyboard shortcuts in Power Apps
- Keyboard navigation support for the Customer Service Hub
- Dynamics 365 Marketing: Accessibility features and keyboard shortcuts for content designers
- Accessibility in App designer, site map designer, and My Apps page
- Create accessible web resources

Finance and operations apps

- Commerce
- Finance
- Human Resources
- Supply Chain Management

Unified Service Desk

For Unified Service Desk, see the following articles:

- General accessibility
- Configure JAWS screen reader
- Keyboard shortcuts for panels
- Performance data collection using keyboard shortcuts

Business Central

- Business Central

Additional resources

Use the following links to learn about additional accessibility capabilities and resources from Microsoft:

- Office Accessibility Center
- Office accessibility checker
- Enterprise accessibility support
- Disability Answer Desk
- Microsoft accessibility

Privacy and personal data in Microsoft Dynamics 365

Article • 05/02/2023

Microsoft Dynamics 365 is committed to helping our customers meet their privacy and personal data requirements. In this topic, you will find information and resources to help you understand how Microsoft Dynamics 365 supports protecting and enabling the privacy rights of individuals, and information and tools to define and support your specific obligations. You can read more about the Microsoft commitment to security at the Microsoft Trust Center.

Data subject requests

The European Union (EU) General Data Protection Regulation (GDPR) gives significant rights to individuals regarding their data. Refer to the Microsoft Learn General Data Protection Regulation Summary for an overview of GDPR, including terminology, an action plan, and readiness checklists to help you meet your obligations under GDPR when using Microsoft products and services.

You can learn more about GDPR and how Microsoft helps support it and our customers who are affected by it.

- The Microsoft Trust Center provides general information, compliance best practices, and documentation helpful to GDPR accountability, such as Data Protection Impact Assessments, Data Subject Requests, and data breach notification.
- The Service Trust portal provides information about how Microsoft services help support compliance with GDPR.

EU Data Boundary

Learn about Microsoft services and the EU Data Boundary at Overview of the EU Data Boundary.

Relevance Search

The Relevance Search report is available for Dynamics 365 Customer Service, Field Service, Marketing, Project Service Automation, and Sales.

Resources to help administrators and customizers configure Relevance Search:

- Configure Relevance Search
- What admins need to know about Relevance Search (video)

Resources to help users get started with Relevance Search:

- Use Relevance Search to search for records
- Find info faster with Relevance Search (video)
- Get more productive with Relevance Search (video)

Person search report

The Person search report is available for Dynamics 365 Finance, Commerce, Human Resources, and Supply Chain Management.

- If you're an application user or administrator, start with Person search report.
- If you're a developer, learn how to extend the Person search report.

Compliance Manager

Compliance Manager is a cross–Microsoft cloud services solution that is designed to help organizations meet complex compliance obligations. It does real-time risk assessment that reflects your compliance posture against data protection regulations when you use Microsoft cloud services. It also provides recommended actions and step-by-step guidance.

You can try Compliance Manager by visiting the Service Trust Portal and downloading it. To get started using Compliance Manager, see Microsoft Purview Compliance Manager (preview).

Compliance Manager white papers and datasheets

- Simplify your compliance journey with Compliance Manager (white paper)
- Prepare for GDPR today with Microsoft 365 (white paper)

Compliance Manager videos

- Introducing Compliance Manager in 2 mins
- Preparing for GDPR: Mechanics video featuring Compliance Manager
- Compliance Manager product demo

Keyboard navigation support for the Customer Service Hub

Article • 11/30/2021

Microsoft is committed to making its products and services easier for everyone to use.

Dynamics 365 Customer Service supports moving around the Customer Service Hub (formerly known as Interactive Service hub) using the keyboard.

The Customer Service Hub app is based on Unified Interface. To see the list of keyboard shortcuts that apply to an app based on Unified Interface, see Use keyboard shortcuts in Dynamics 365 Customer Service applications.

To do	Select
Go to the next tab stop in the defined tab stop order. The tab order is from left to right and top to bottom.	Tab
Go to the previous tab in the tab order.	Shift + Tab
Go to the next section or major component for example to go to the next stream in the dashboard.	F8
Go to the previous section. This shortcut can't be used on Mozilla Firefox for the intended purpose.	Shift + F8
Move to the next item in a list or in a group of options.	Down Arrow
Move to the previous item in a list or in a group of options.	Up Arrow
Expand a collapsed control.	Right Arrow
Collapse an expanded control.	Left Arrow
Select a check box or make a selection.	Spacebar
Perform or complete an action, such as clicking a link or searching for records based on keywords.	Enter
Close or cancel an alert or flyout.	Esc
Select multiple continuous records in a list or queue.	Shift + Down/Up arrow
Select multiple discontinuous records in a list or queue.	Press Ctrl, go to the desired record, and then use the spacebar to select the record

See also

Customer Service Hub – User's guide

Availability of Customer Service Hub

Article • 07/09/2021

Try Dynamics 365 Customer Service for free

The Customer Service Hub solution is automatically installed in the environments that have customer engagement apps, such as Customer Service and Sales Hub.

The salient features of the integrated solution are as follows:

- Existing customers can access **Customer Service Hub** in their environment. To learn more: Introduction to Customer Service Hub.
- Users with the **Customer service app access** security role can view and use the app. To learn about granting or revoking the role, see Assign a security role to a user.
- If you delete the app manually, it will be installed automatically during the next update cycle.
- You can determine which users will have access and visibility to the app using security roles. To learn more: Manage access to Power Apps apps by using security roles.

Move from Dynamics 365 Customer Service Enterprise to Dynamics 365 Customer Service Professional

Article • 07/18/2022

Customer Service Professional is targeted at businesses that have fewer needs and don't require the full capabilities that are offered by Customer Service Enterprise.

To switch from Customer Service Enterprise to Customer Service Professional, do the following steps:

1. Purchase a Customer Service Professional subscription.
2. Assign Customer Service Professional licenses to the users and remove the Customer Service Enterprise licenses from the users.
3. Review the Microsoft Dynamics 365 Licensing Guide.

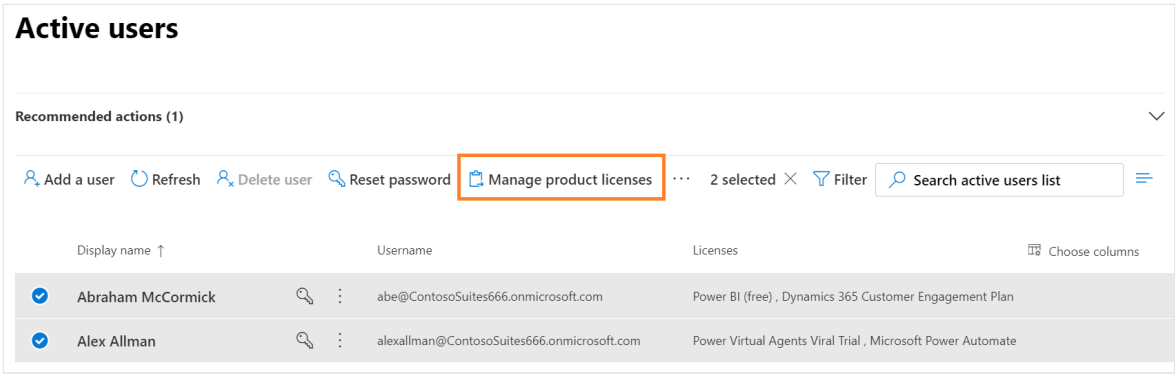
Purchase a Customer Service Professional subscription

1. Sign in to the Microsoft 365 admin center with the Dynamics 365 account that has admin permissions.
2. In the navigation pane, expand **Billing** and select **Purchase Services**, and then select the Dynamics 365 Customer Service Professional tile.
3. Select **Buy**, and then follow the steps to purchase new licenses.

Assign and remove licenses

After you've purchased the licenses, assign the licenses to users.

1. In the Microsoft 365 admin center navigation pane, select **Users** > **Active users**.
2. Select multiple users, and then select **Manage product licenses**.



3. Select **Replace** to unassign existing licenses and assign new ones.
4. Select the license for your Dynamics 365 Customer Service Professional plan.
5. Select **Save changes**.
6. Review the license status on the **Active users** page, and make other assignments as needed.

> **Important**
>
> As per contractual agreement, you can't mix Enterprise and Professional users on the same instance. If you plan to keep Professional licenses, make sure that you abide by the contractual requirements. More information: **Microsoft Dynamics 365 Licensing Guide**

See also

Dynamics 365 Licensing Update

Provision Omnichannel for Customer Service

Article • 10/04/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

Omnichannel for Customer Service provides a modern, customizable, high-productivity app that lets agents help customers across different channels via a unified interface. It lets organizations choose the channel that suits their business needs. It also ensures that a high level of responsive, quality service is received across channels.

To find out if Omnichannel for Customer Service is available in your region, see International availability.

Looking for an upgrade? See Upgrade Omnichannel for Customer Service for more information.

You can provision the following channels in Omnichannel for Customer Service:

- Chat
- Voice
- SMS
- Social
- Microsoft Teams

> **Important**
>
> The channels that you want to provision might require a license. More information: **Dynamics 365 Licensing Guide**.

Prerequisites

- Obtain an active subscription of one or more of the following:
  - To provision the Omnichannel for Customer Service application, Chat for Dynamics 365 Customer Service or Dynamics 365 Digital Messaging
  - To provision the voice channel, Voice Channel for Dynamics 365 Customer Service

    > **Note**
    >
    > More information: **Pricing**, Dynamics 365 Licensing Guide, and **How to purchase through Volume Licensing**. You can also get a free 30-day trial if you have the required prerequisites. More information: **Try channels for Dynamics 365 Customer Service**.

- Set up the prerequisites mentioned in the system requirements. More information: Prerequisites.

- Ensure that the provisioning user has the following permissions:
  - Microsoft 365 Global admin role. More information: Assign admin roles to user in Microsoft Office 365
  - Dynamics 365 System Administrator role on the root business unit for your organization. More information: Assign security roles to a user in Power Platform and Create or edit business units
  - Read-Write access in the Client Access License Information (CAL). More information: Create a Read-Write user account in Power Platform

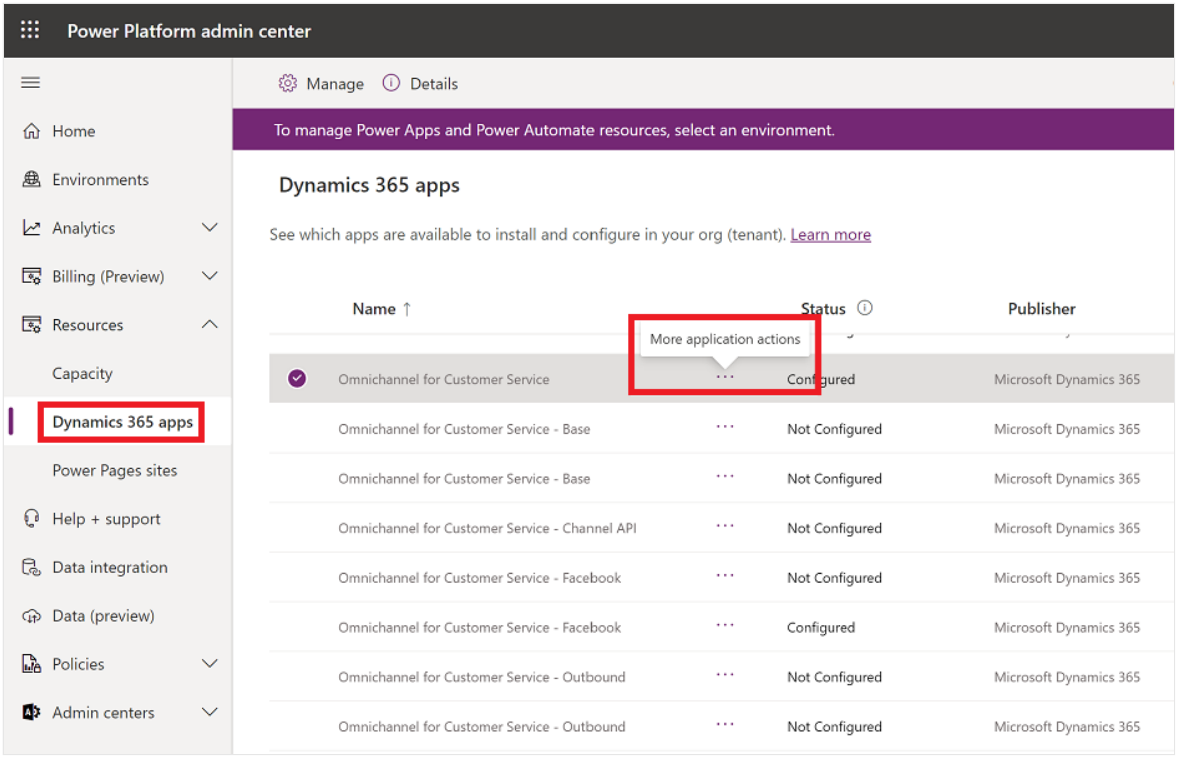
Set up Omnichannel for Customer Service

1. In Power Platform admin center, on the **Environments** page, select the environment in which you want to set up Omnichannel for Customer Service.
2. In the left pane, expand **Resources**, and select **Dynamics 365 apps**.

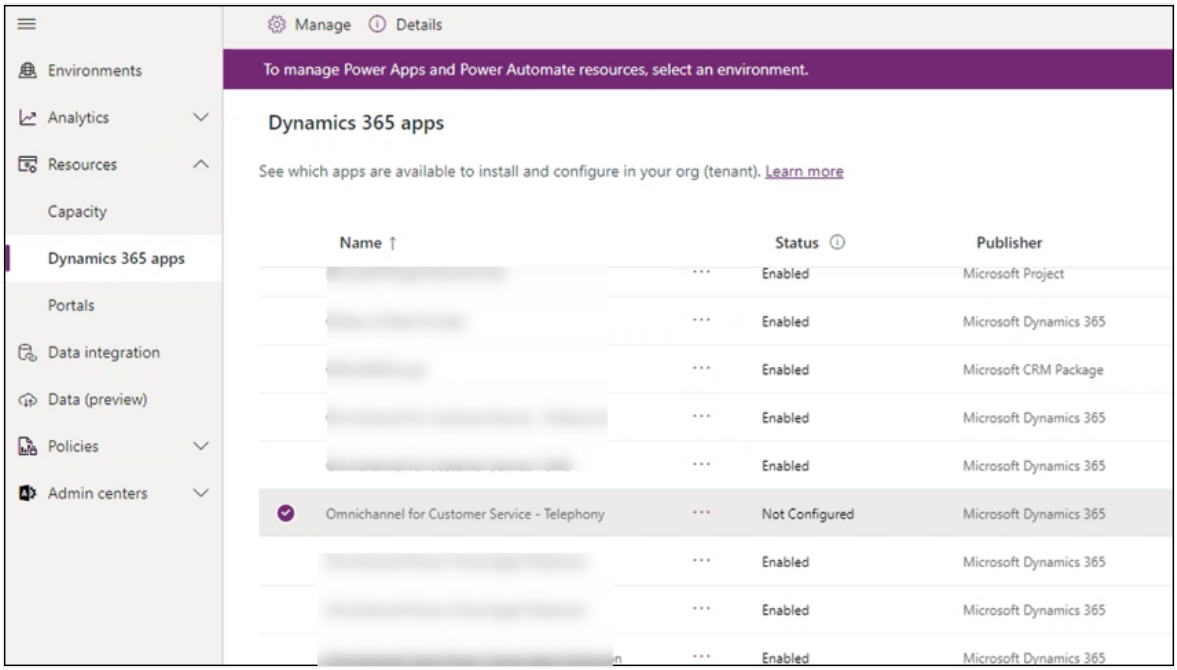
   > **Note**
   >
   > Don't select **Environments** in the left pane and try to navigate to **Dynamics 365 apps** from there. The correct way to navigate to the **Dynamics 365 apps**

management options is to expand **Resources** in the left pane and select **Dynamics 365 apps**.

3. On the **Dynamics 365 apps** page, select the ellipsis for **More application actions** next to **Omnichannel for Customer Service**, and then select **Manage**.

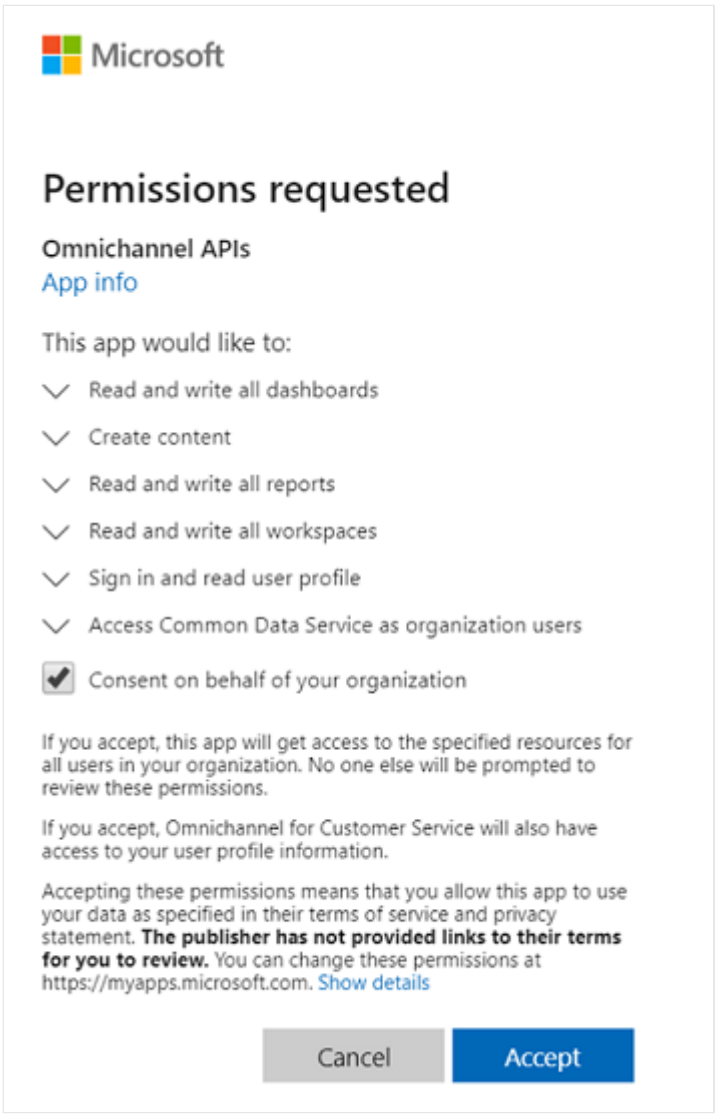


4. If you're installing the voice channel only, select **More commands** for **Omnichannel for Customer Service - Telephony**.



5. On the **Manage Omnichannel for Customer Service** message, select **OK**. The **Dynamics 365 Administration Center | Omnichannel** page is displayed on a new tab.

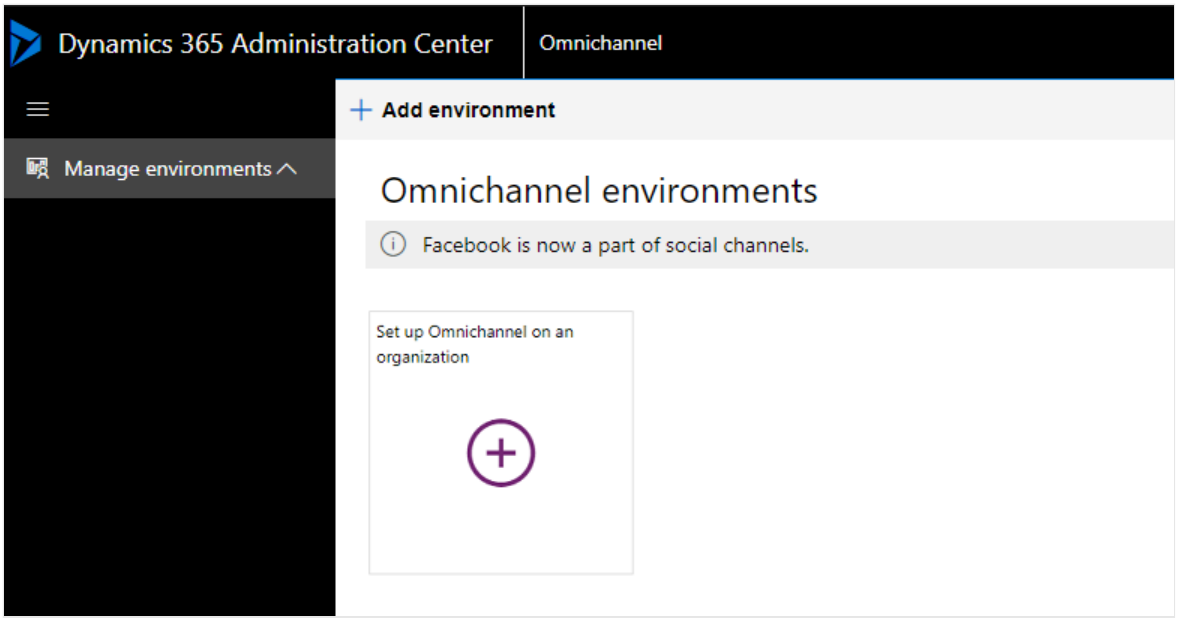
6. Select the **Consent on behalf of your organization** checkbox.



7. Select **Accept** to grant data access consent.

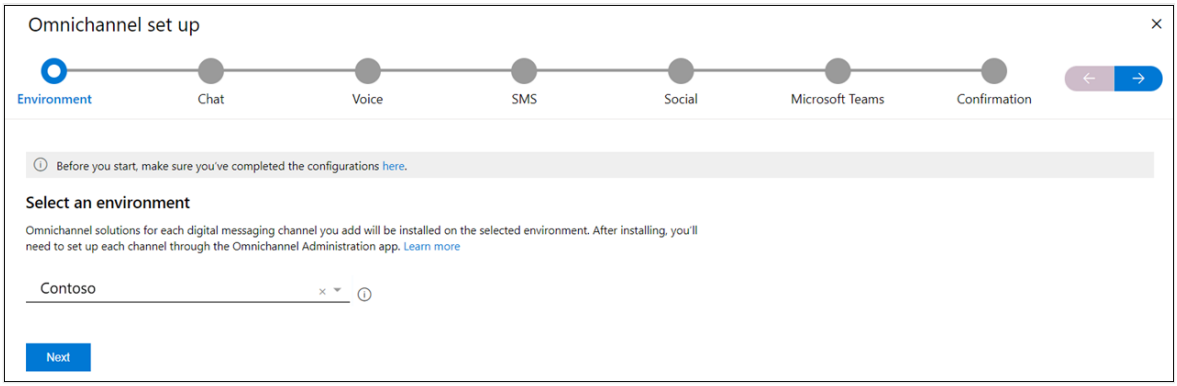
   For information about app permissions, see Azure app Power BI API permissions and Data access consent to provision Omnichannel for Customer Service.

8. On the **Manage Omnichannel Instances** page, select **Add environment** to add an environment. Omnichannel is set up for the organization environment that you add here.



> **Important**
>
> As an admin, you can configure Omnichannel in multiple environments. You can view the status of all organization environments where the Omnichannel app has been configured in the **Manage environments** view.

9. Select the environment in the dropdown list, then perform the following steps.



   a. Select **Next**, and in the **Chat** section, set the **Add chat** toggle to **Yes** to enable the Chat channel.

   b. In the **Voice** section, set the **Add voice** toggle to **Yes** to enable the voice channel. Ensure that you select the **Voice and SMS Terms** checkbox.

   c. In the **SMS** section, set the **Add SMS** toggle to **Yes** to enable SMS. Select the checkbox to confirm that you agree to the SMS terms.

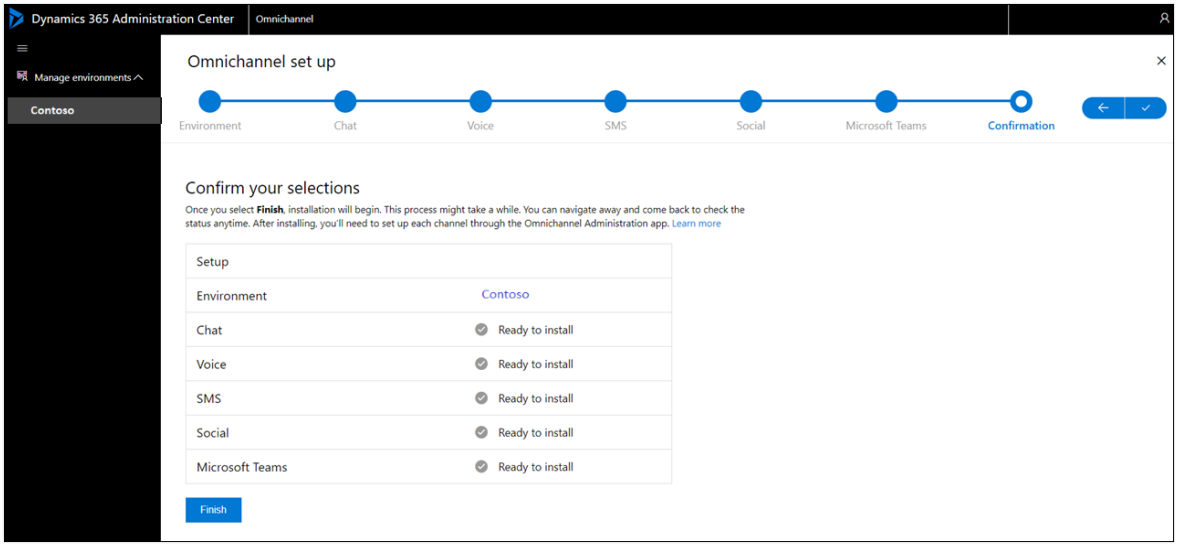
   > **Important**

> You must select the checkbox for **SMS Terms** to enable SMS and proceed with the setup.

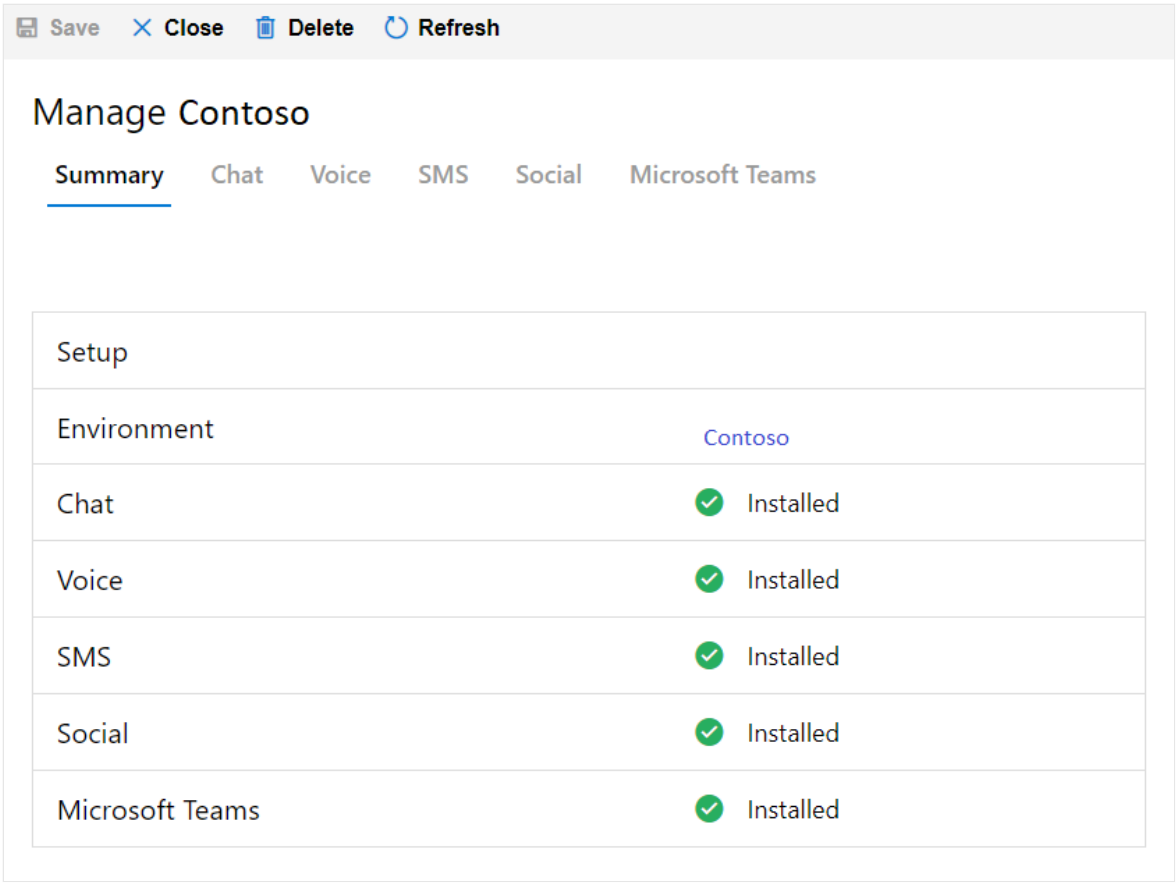
d. In the **Social channels** section, set the **Add social** toggle to **Yes** to enable social channels.

e. In the **Microsoft Teams** section, set the **Add Microsoft Teams** toggle to **Yes** to enable Microsoft Teams.

10. On the **Confirmation** page, verify your selections, and then select **Finish** to provision Omnichannel for Customer Service in your organization.



The setup can take several minutes. You can close the window and check after some time, or refresh to check if it's complete. After the setup is complete, the selected channels are enabled in your environment.



Important

- After you successfully provision Omnichannel for Customer Service, you might see the status as "Not configured" on the **Dynamics 365 apps** page. You can safely ignore the status.
- If the provisioning of Omnichannel for Customer Service fails and you retry it, you might see an app profile named **Omnichannel Upgraded OOB Default app profile** on the **App profiles** page in Power Apps. You can safely delete this app profile that is created.

Update Omnichannel for Customer Service application

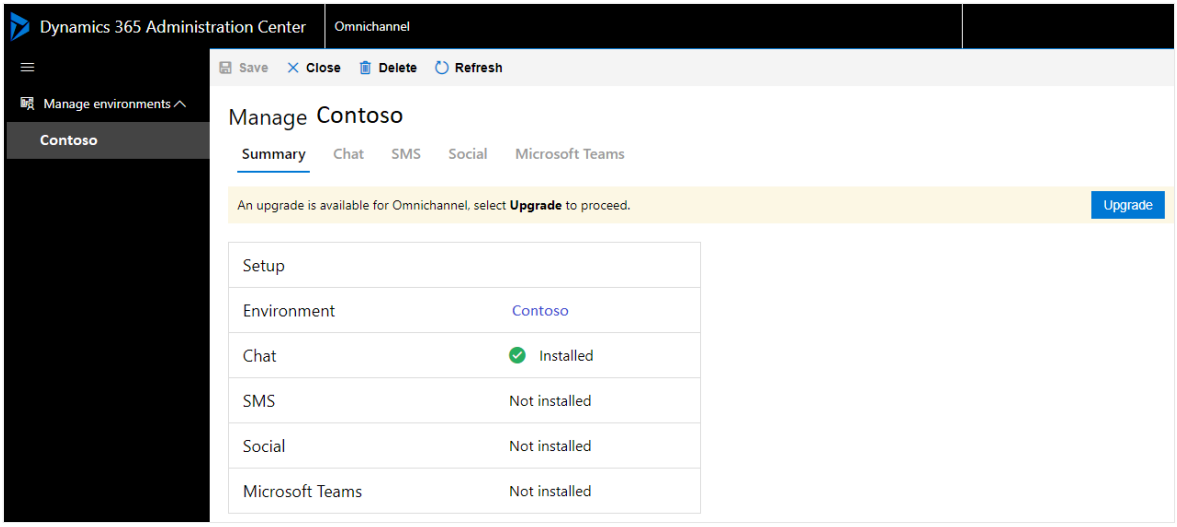
After the Omnichannel for Customer Service application is successfully provisioned, you can update the environment by enabling or disabling the required channels.

1. In the **Power Platform Admin Center**, on the **Environments** page, select the environment where you want to set up Omnichannel for Customer Service.

2. In the left pane, expand **Resources**, and then select **Dynamics 365 Apps**.

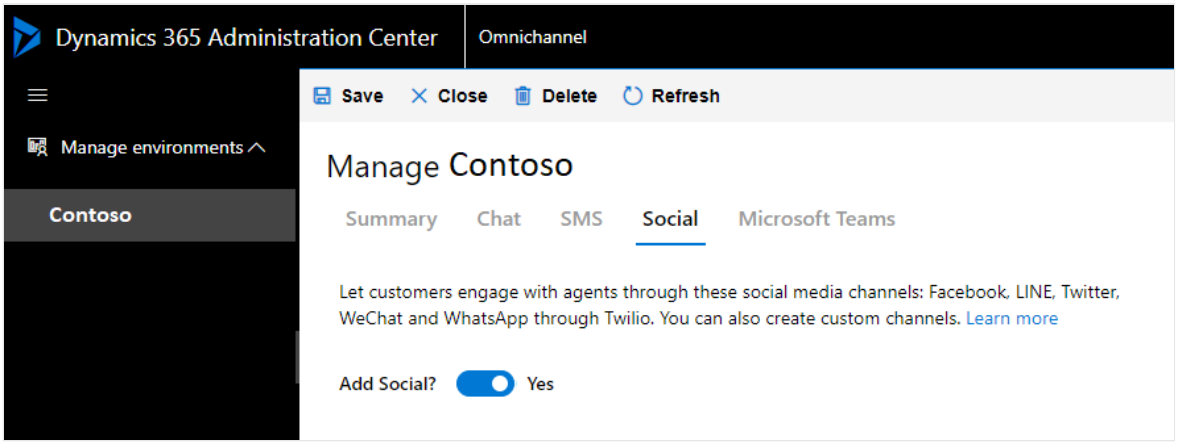
3. On the **Dynamics 365 apps** page, select **More commands** beside **Omnichannel for Customer Service**, and then select **Manage**.

4. Select **OK** on the **Manage Omnichannel for Customer Service** message. The **Dynamics 365 Administration Center | Omnichannel** page is displayed on a new tab.

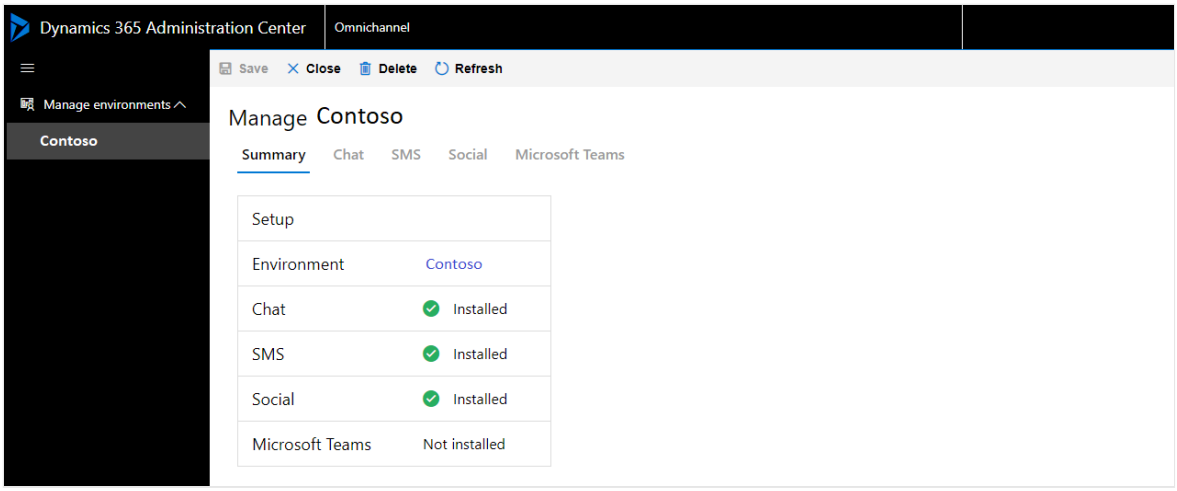


5. Select the channel to be enabled. For example, in this procedure, we'll enable the Social channels.

6. On the **Social** tab, set the toggle to **Yes** to enable social channels in your environment.

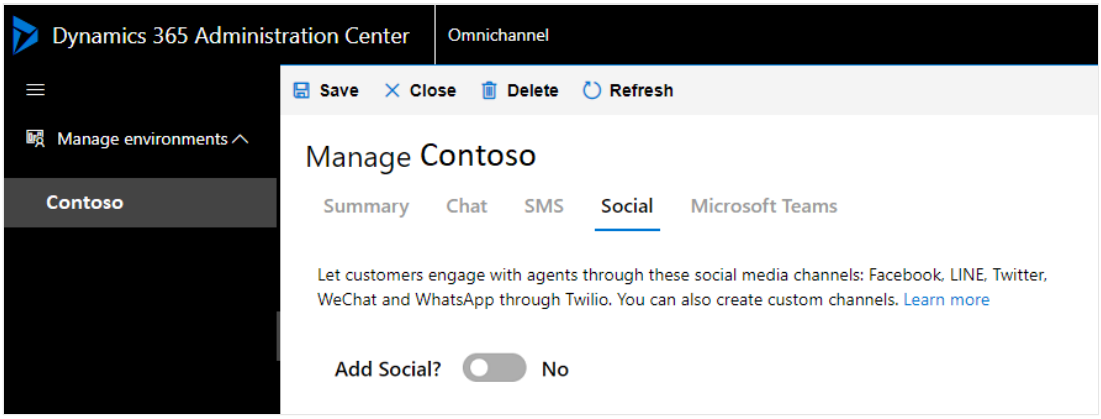


7. Select **Save**. After the update is complete, the status is displayed on the **Summary** tab.



8. To disable a previously enabled channel, set the toggle to **No**. For example, in this procedure, we'll disable the Social channel.

    - On the **Social** tab, set the toggle to **No** to disable social channels in your environment. A confirmation message is displayed to remove the channel. Select **Remove**.



> **Note**
>
> If you disable all channels, Omnichannel for Customer Service will be removed from your organization.

Troubleshoot provisioning

Instance is not available to select on the provisioning application

See also

Upgrade Omnichannel for Customer Service
Create workstreams
Manage users

Export and import app configuration data

Article • 07/31/2023

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

After you've used Omnichannel for Customer Service in a test environment, you can export some of your app configuration data to a live production environment. Use the configuration management tool to export and import the data. More information: Download the Configuration Migration tool from NuGet using the PowerShell script

> **Important**
>
> Channel configurations are specific to the environment in which they're created, so exporting and importing complete configurations as-is won't work. We recommend that you create them using the Customer Service admin center app.

While you can use the Configuration Migration tool to export and import entity data, omnichannel-related configurations contain different entities that have internal dependencies. Therefore, you must bring together the required data by following a very specific process. For example, if you've already imported the context variables and then try to import preconversation configuration, which also creates context variables, the import might not work. Similarly, you must import all the internal entities, such as ruleset configurations that contain decision rulesets and contracts, for the import of workstreams and record queues to be successful.

> **Note**
>
> - To export and import record type of channel across environments, contact **Microsoft Support**.
> - Environment lifecycle operations, such as copy and restore of environment, aren't supported.

- However, if you do copy an environment, Omnichannel for Customer Service in the target environment must be **uninstalled** and **provisioned** again.
- We recommend that you don't export the msdyn_analytics entity. Because the entity contains org-specific configuration data for intraday insights in Omnichannel for Customer Service, exporting it might lead to an incorrect configuration of your intraday insights data.

See also

Provision Omnichannel for Customer Service
Upgrade Omnichannel for Customer Service
Migrate configuration data for records based on unified routing
Migrate configuration for live chat
Migrate configuration for voice channel
Enable third-party cobrowse and screen sharing
Overview of channels

Remove Omnichannel for Customer Service

Article • 07/07/2021

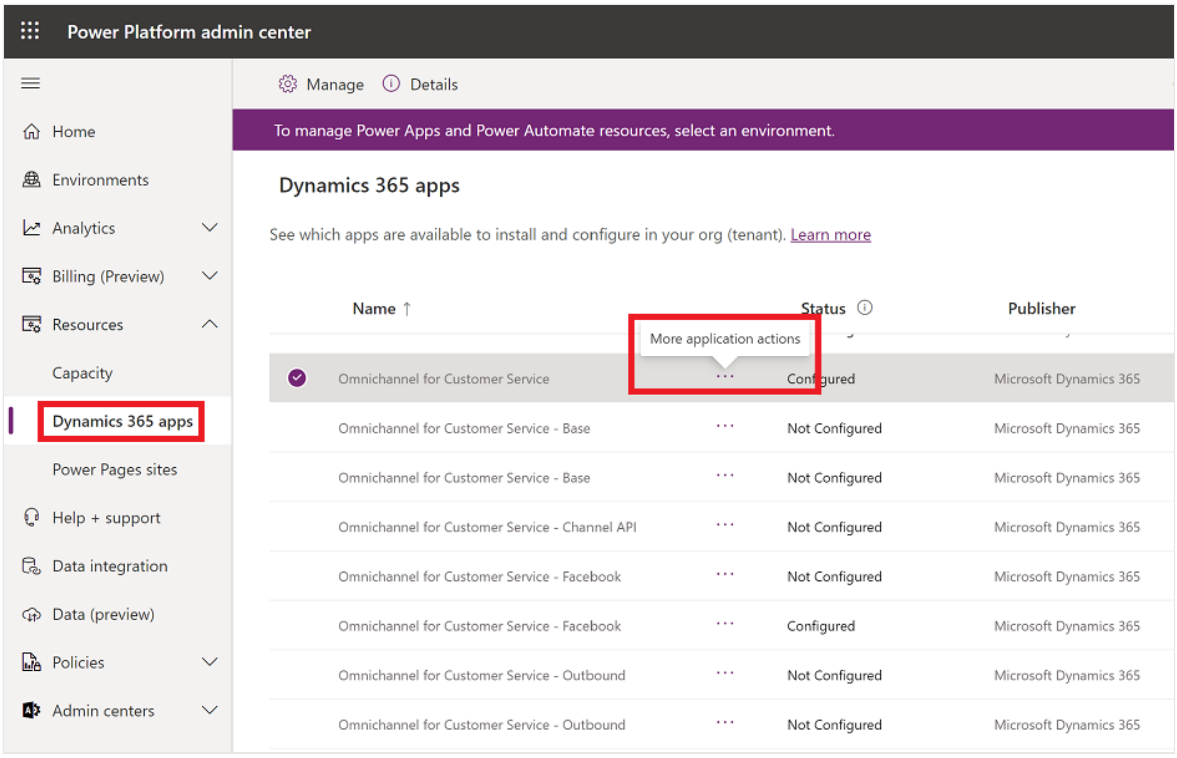
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can remove Omnichannel for Customer Service and disable all channels for a Dynamics 365 Customer Service organization.

> **Note**
>
> Omnichannel for Customer Service will be automatically removed if you do any of the following:
>
> - Delete the Dynamics 365 CRM instance from the Dynamics 365 admin center.
> - Reset the Dynamics 365 CRM instance from the Dynamics 365 admin center.
> - Modify or change the Dynamics 365 CRM instance to a different organization ID.
>
> Removing Omnichannel for Customer Service will not delete Omnichannel solutions. To delete Omnichannel solutions, see **Delete Omnichannel solutions**.

To remove the Omnichannel for Customer Service from the organization,

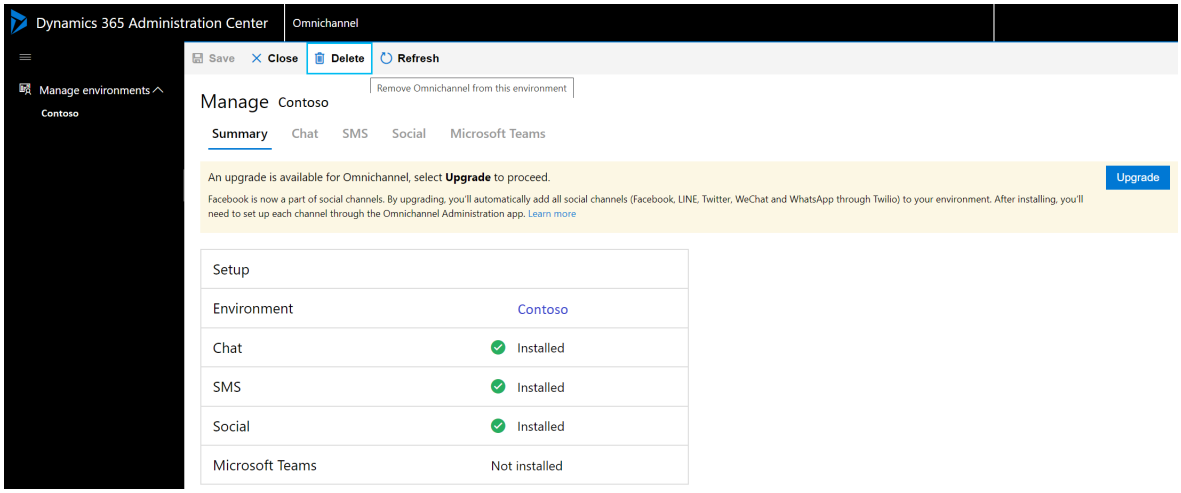
1. In **Power Platform Admin Center**, on the **Environments** page, select the environment in which Omnichannel for Customer Service needs to be removed.



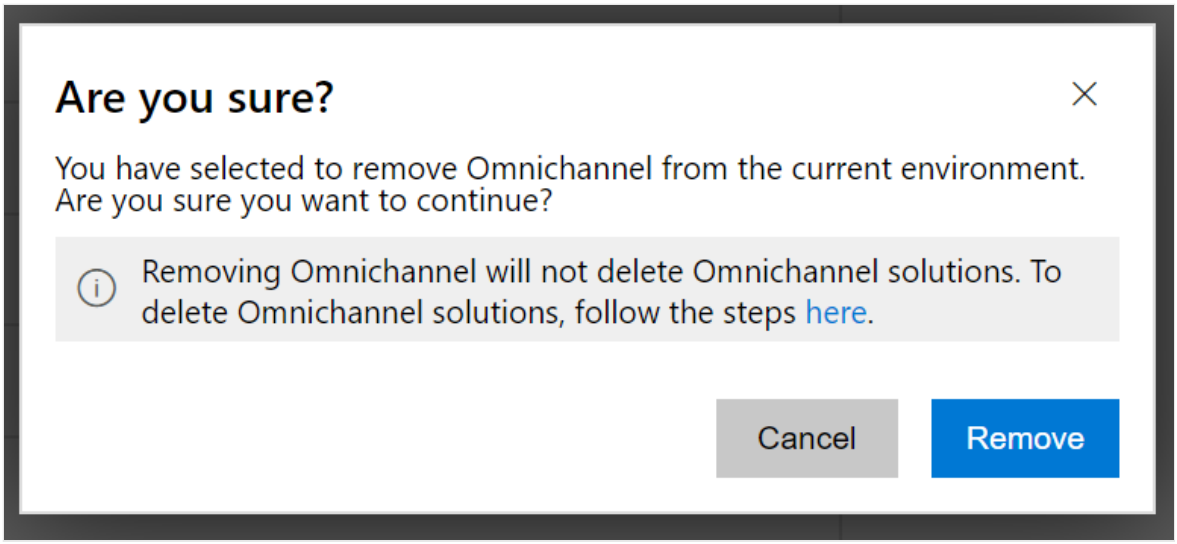
2. In the left pane, expand **Resources**, and select **Dynamics 365 Apps**.

3. On the **Dynamics 365 apps** page, select **More commands** beside **Omnichannel for Customer Service**, and then select **Manage**.

4. On the **Manage <*environment_name*>** page, select **Delete**.



5. In the confirmation dialog box, select **Remove** to proceed.



Important

Removing Omnichannel for Customer Service will disable all channels in the selected organization.

After Omnichannel is removed, you can enable it again from the **Manage environments** view.

See also

Provision Omnichannel for Customer Service
Upgrade Omnichannel for Customer Service
Delete Omnichannel solutions

Uninstall solutions in Omnichannel for Customer Service

Article • 05/23/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

When you uninstall Omnichannel for Customer Service from your organization, the omnichannel solutions are not removed. If you want to remove omnichannel solutions from your organization, you must use the same order as mentioned in the following table.

> **Important**
>
> Some solutions are shared across apps, and shouldn't be removed unless you intend to uninstall those apps too; skip those solutions.
>
> For example, if you plan to remove omnichannel solutions from your organization, you must remember that the unified routing part of Omnichannel for Customer Service solutions might be used in unified routing for Customer Service. So you must ensure that you don't uninstall or delete the common solutions as it might affect the way unified routing works in Customer Service.

1. Sign in to your `https://<org>.dynamics.com/apps` environment.
2. Select **Settings** > **Advanced Settings** on the command bar. The **Settings** page is displayed in a new browser tab.
3. Go to Dynamics 365 **Settings** > **Solutions**.
4. On the **Solutions** page, select each solution from the following list, and then select **Delete** to remove them one at a time.

Order	Solution name	Note
1	`ProductivityToolsAnchor`	

Order	Solution name	Note
2	`msdyn_OmnichannelProductivityToolsSettings`	
3	`msdyn_Smartassist_managed`	Required for Customer Service Hub and Customer Service workspace
4	`msdyn_ProductivityPaneControl_managed`	
5	`msdyn_AgentGuidance_managed`	
6	`msdyn_Agentscript_managed`	Required for Customer Service Hub and Customer Service workspace
7	`msdyn_ProductivityMacros_managed`	
8	`OmnichannelPrimeChatAnchor`	
9	`OmnichannelPrimeSMSAnchor`	
10	`OmnichannelPrimeFacebookAnchor`	
11	`OmnichannelPrimeTeams`	
12	`OmnichannelPrimeSocialChannelsAnchor`	
13	`OmnichannelPrimeOutboundAnchor`	
14	`OmnichannelPrimeTelephony`	
15	`OmnichannelPrimeAnchor`	
16	`msdyn_CustomerServiceworkspaceChannels`	
17	`msdyn_OmnichannelEngagementHubPatch`	
18	`OmnichannelEngagementHubPreview`	
19	`msdyn_OmnichannelPrimePatch`	
20	`OmnichannelPrime`	
21	`msdyn_OmnichannelSMSPatch`	
22	`msdyn_OmnichannelFacebookPatch`	
23	`OmnichannelOutbound`	
24	`OmnichannelSMS`	
25	`OmnichannelTeams`	

Order	Solution name	Note
26	`OmnichannelSocialChannels`	
27	`OmnichannelChat`	
28	`OmnichannelFacebook`	
28	`msdyn_OmnichannelBotEnablerPatch`	
29	`OmnichannelBotEnabler`	
30	`OmnichannelTelephony`	You must delete all the related workstreams before you delete OmnichannelTelephony
31	`ScenariosAndChannels`	
32	`msdyn_CIFrameworkPatch`	
33	`ChannelAPIIntegrationFramework`	
34	`OmnichannelIntelligence`	
35	`OmnichannelConfiguration`	
36	`msdyn_MacrosDataOmnichannel`	

5. A confirmation message appears that prompts you to uninstall the managed solution. Select **OK**.

Uninstall Omnichannel historical analytics solutions

To remove the solutions for Omnichannel historical analytics

1. Disable Omnichannel historical analytics in the Insights section of Omnichannel admin center. More information: Configure Omnichannel historical analytics reports

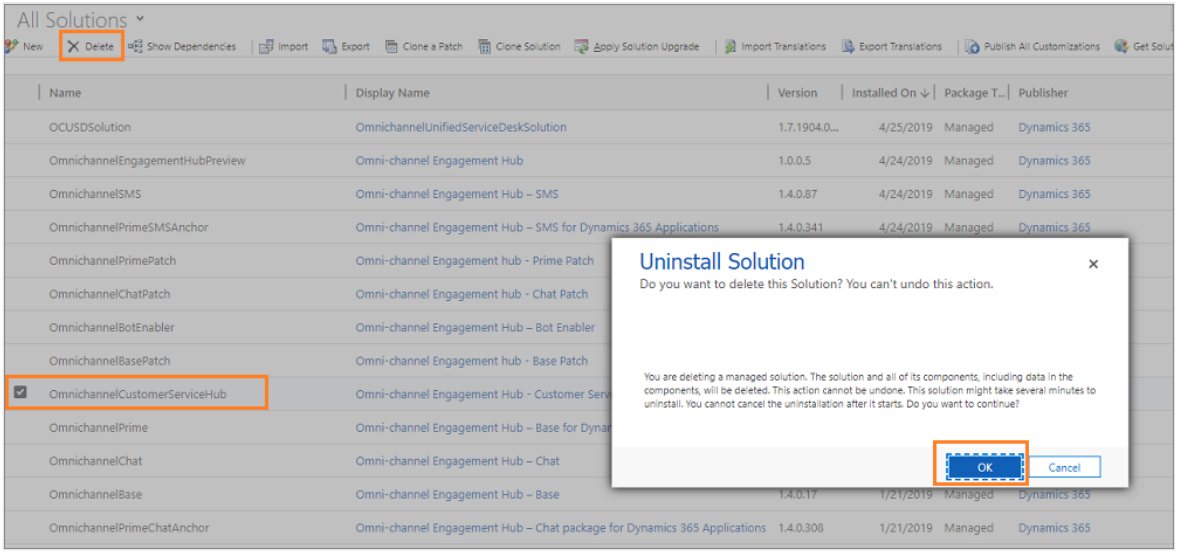
2. On the **Solutions** page, select and uninstall the following solutions, one at a time, in this order:
   a. `msdyn_InsightsAnalyticsOCConfiguration`
   b. `msdyn_DataInsightsAndAnalyticsForOC`

Uninstall OmnichannelCustomerServiceHub solution

When you upgrade Omnichannel for Customer Service to the latest release, certain managed solutions appear on the **Solutions** page of Microsoft Dataverse. After the upgrade is complete, you must uninstall those solutions from the previous release if the upgrade does not remove them. Also, if your organization is using the **Customer Service Hub** app, then you must uninstall the app from the channel configuration in the **Channel Integration Framework** app.

To uninstall the OmnichannelCustomerServiceHub solution from your organization

1. Sign in to your `https://<org>.dynamics.com/apps` environment.
2. Select **Settings** > **Advanced Settings** on the command bar. The **Settings** page is displayed on a new browser tab.
3. Go to Dynamics 365 **Settings** > **Solutions**.
4. On the **Solutions** page, select the **OmnichannelCustomerServiceHub** solution, and then select **Delete**.
5. A confirmation message appears that prompts you to uninstall the managed solution. Select **OK**.



You have deleted the **OmnichannelCustomerServiceHub** solution from your organization.

Remove Customer Service Hub from channel provider configuration

The following steps describe how to remove Customer Service Hub solution from your organization.

1. Sign in to the Dynamics 365 instance.
2. Select the dropdown button on Dynamics 365 and select **Channel Integration Framework**.
3. Select the record that is related to Omnichannel.
4. Remove **Customer Service Hub** from the **Select Unified Interface Apps for the Channel** section.
5. Select **Save** to save the record.

See also

Upgrade Omnichannel for Customer Service
Omnichannel for Customer Service on Unified Service Desk
Deploy Unified Service Desk - Omnichannel for Customer Service package

Upgrade Omnichannel for Customer Service

Article • 07/07/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Upgrade to the latest version of Omnichannel for Customer Service to unlock the benefits of new features. You can now upgrade to the latest release of Omnichannel for Customer Service from the **Omnichannel environments** page in **Dynamics 365 Admin Center**.

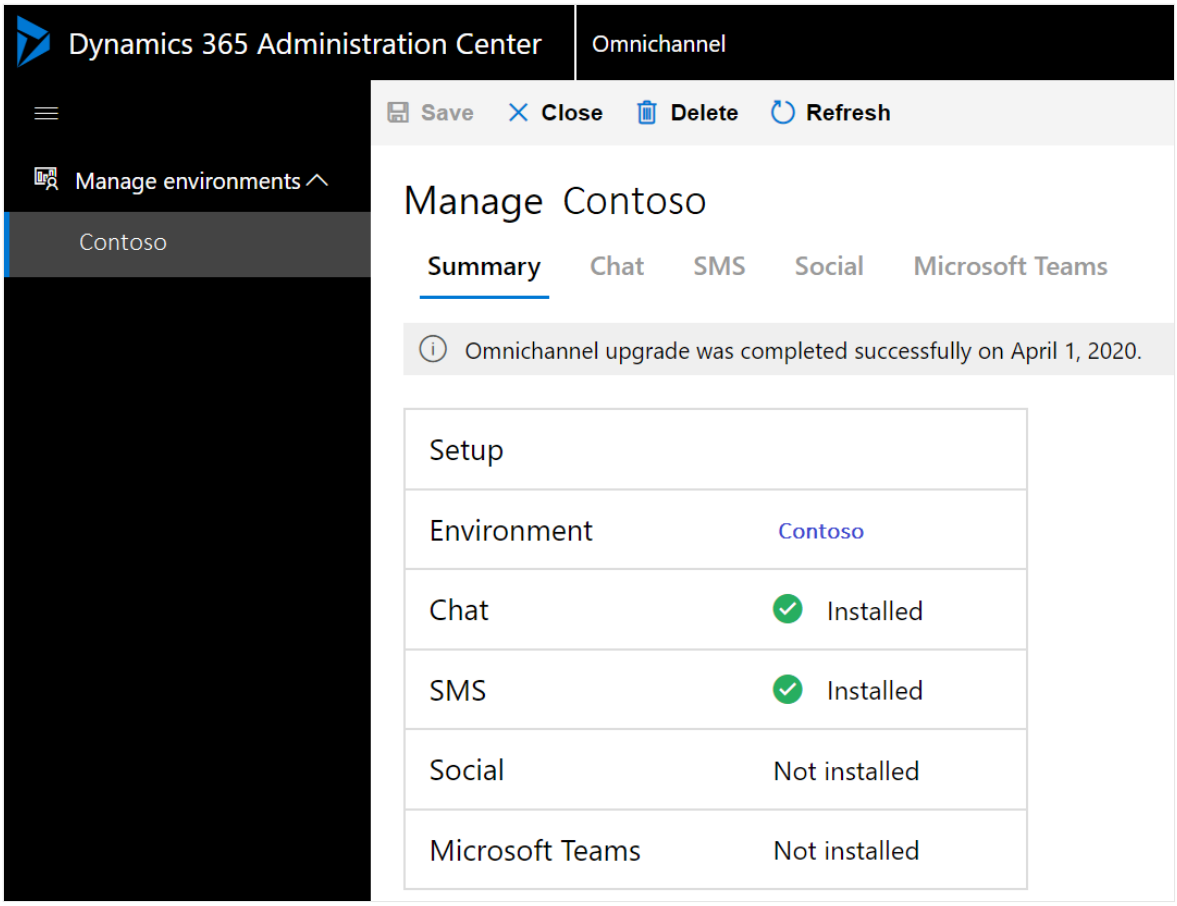
See What's new in Omnichannel for Customer Service to learn about the new features in the latest release.

Do the following steps to upgrade Omnichannel for Customer Service:

1. Log in to the Power Platform admin center.
2. Expand **Resources**, and select **Dynamics 365 apps**.
3. On the **Dynamics 365 apps** page, scroll to the **Omnichannel for Customer Service** application, select the ellipses (...), and then select **Manage**. The **Omnichannel environments** page opens on a new tab.
4. Select your environment under **Manage environments** in the left pane.
5. Select the **Upgrade** button that is enabled when an upgrade is available.

   The system begins the upgrade and displays the message **Omnichannel upgrade is currently in progress**.

   When the upgrade process is completed successfully, your environment is upgraded to the latest version, and the message **Omnichannel for Customer Service upgrade was completed successfully** is displayed with the date.



Upgrade Omnichannel for Customer Service package on Unified Service Desk

If you are using Omnichannel for Customer Service on Unified Service Desk, see Deploy package on Dynamics 365 Customer Service instance to upgrade.

See also

Omnichannel for Customer Service system requirements
Provision Omnichannel for Customer Service

Try channels in Omnichannel for Customer Service

Article • 01/11/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Channels, like Live Chat, voice, and SMS, are engagement channels that let your agents connect with customers in real time and provide quick personalized help.

You can perform the following steps to try channels in Omnichannel for Customer Service:

1. Sign up for a free 30-day trial of channels through Microsoft 365 admin center.
2. Provision Omnichannel for Customer Service.

Channels trial through Microsoft 365 admin center

The Dynamics 365 Customer Service Digital Messaging Add-on Trial is a free 30-day trial of Chat, SMS, and social channels that you can download from the Microsoft 365 admin center.

Prerequisites for trial through Microsoft 365 admin center

You must have obtained one of the following subscriptions through the Microsoft 365 admin center (that is, Web Direct):

- Paid or trial subscription of Dynamics 365 Customer Service Enterprise
- Paid or trial subscription of Dynamics 365 Customer Engagement
- For voice channel, subscription of Dynamics 365 Customer Engagement Applications Trial

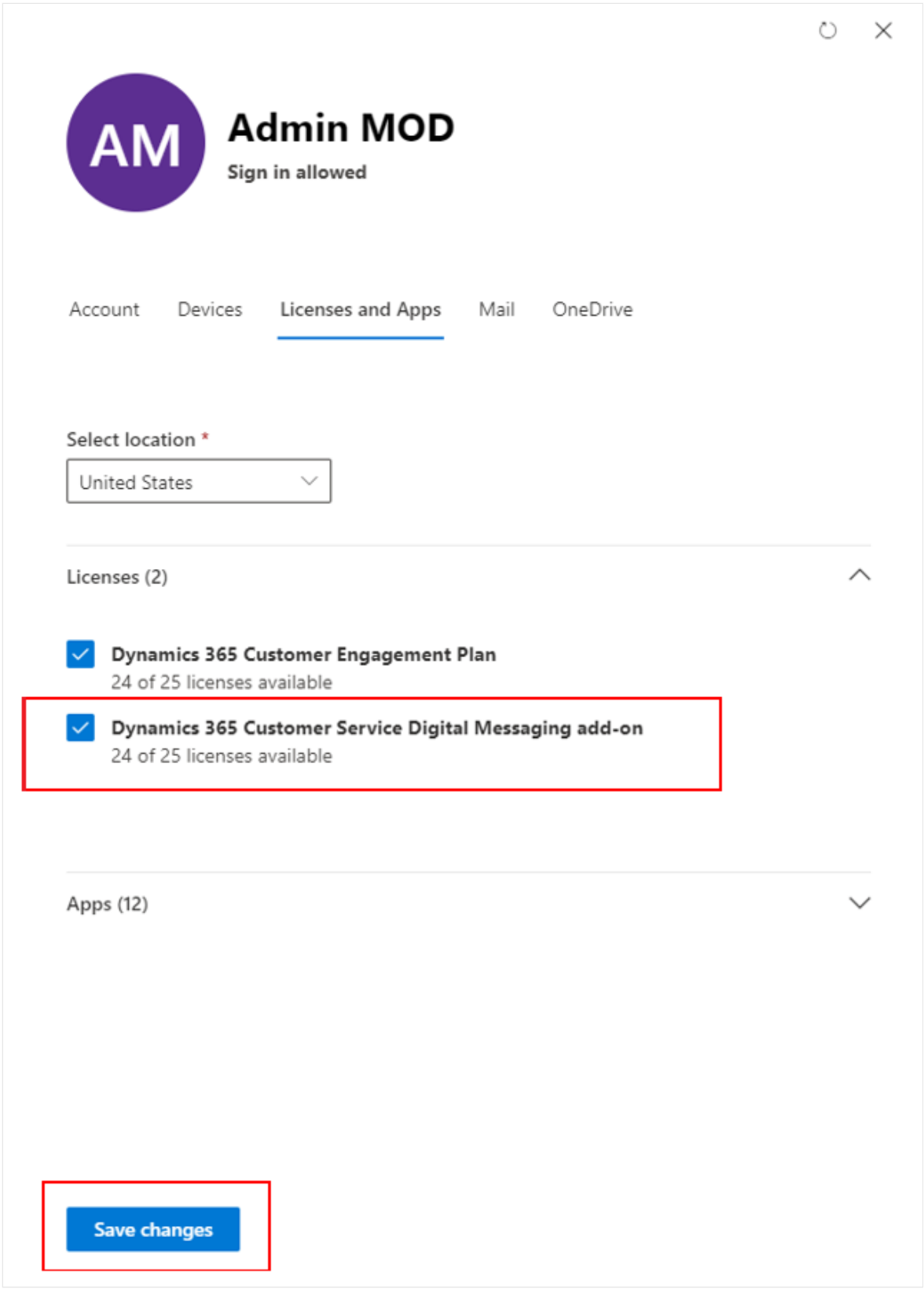
> **Important**

If you don't have one of these subscriptions, or if you purchased your subscription somewhere other than Web Direct, then the option to try channels will not be available in the Microsoft 365 admin center. In such cases, we recommend that you use the **Customer Service trial**.

For information about the Digital Messaging license, pricing, and prerequisites, see the Dynamics 365 Licensing Guide.

Get a trial subscription of channels

1. Sign in to Microsoft 365 admin center with the global administrator credentials.
2. Go to **Billing** > **Purchase Services**, scroll down, and select **Add-ons**.
3. Select **Dynamics 365 Customer Service Digital Messaging add-on Trial**.
4. You can start a 30-day trial of Digital Messaging with 25 user licenses.
5. After signing up for a trial, you must assign licenses of Digital Messaging to the users who need to engage with customers and provide support via Omnichannel for Customer Service. Select one or more active users and edit their product licenses. After you're done, select **Save**.



Get a trial subscription of voice channel

1. In Microsoft 365 admin center, expand **Billing**, and select **Purchase services**.
2. Search for **Dynamics 365 Customer Engagement Applications Trial**, and select it.
3. Select the **Add-ons** tab, and then select one of the following add-ons to get the trial subscription of the voice channel:

- Dynamics 365 Customer Service Voice Channel Add-in Trial
- Dynamics 365 Customer Service Digital Messaging and Voice Add-in Trial

4. Select **Details**, and on the page that appears, select **Start free trial** to complete your purchase.

5. Go to the **Active users** page, and assign the trial license to the user who will provision the voice trial. Only then the user will be able to see the voice trial for provisioning it.

6. Provision the channel in your environment by following the steps mentioned in the next section of this article.

Provision channels in your organization

Perform the tasks in Provision Omnichannel for Customer Service to set up Omnichannel for Customer Service and enable Chat, SMS, social, and voice channels in your organization.

After a channel is enabled in your organization, you can sign in to the Dynamics 365 organization, and select the Customer Service admin center or Omnichannel admin center app to start configuring the channel. See the following articles to configure channels in Omnichannel for Customer Service:

- Configure the chat channel
- Configure the SMS channel
- Configure the Facebook channel
- Configure the voice channel

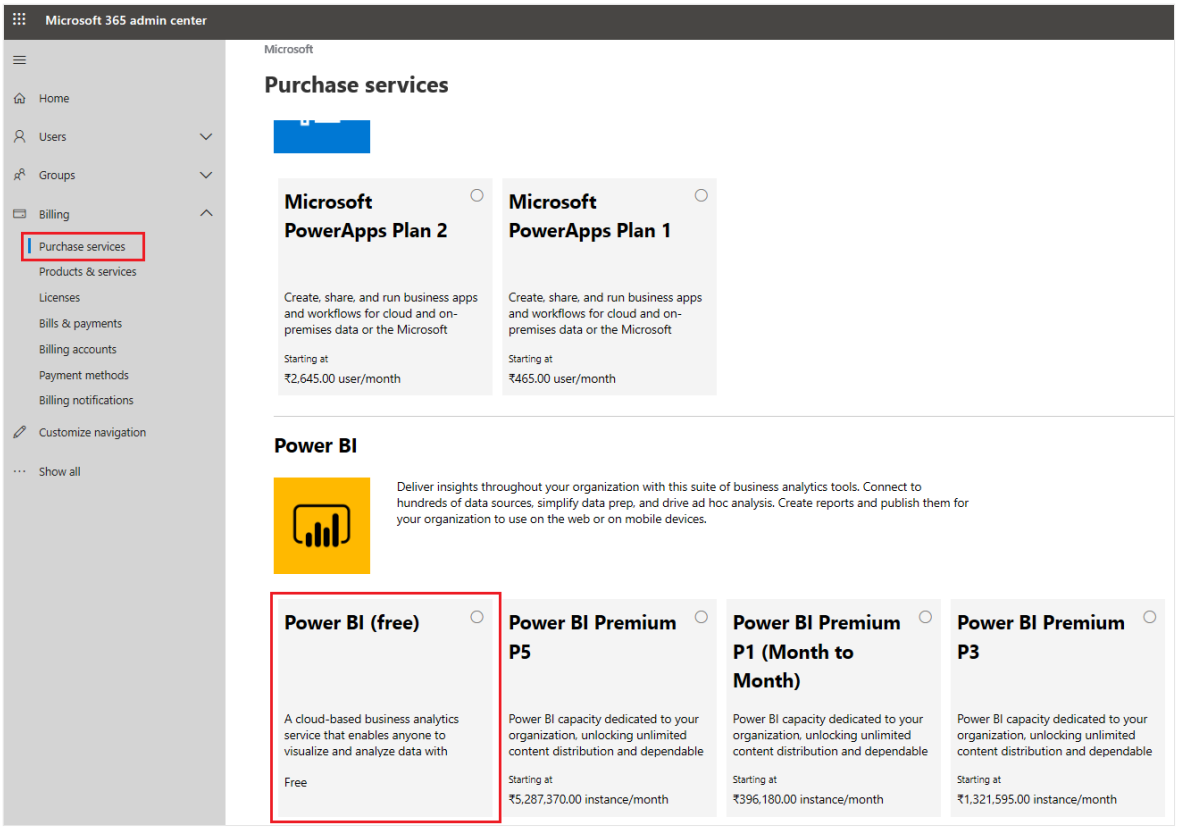
Get a Power BI (free) subscription

If you already have a subscription of Dynamics 365 Customer Service Enterprise or a subscription of Power BI in your tenant, you can skip this step. Otherwise, you must get a Power BI (free) subscription.

1. Sign in to Microsoft 365 admin center with the global administrator credentials.

2. Go to **Billing** > **Purchase services**.

3. Search for Power BI (free) and complete the purchase of Power BI (free) subscription.



Videos

To view videos on Omnichannel for Customer Service, see Videos.

See also

Provision Omnichannel for Customer Service
Configure a chat channel
Configure an SMS channel
Configure a Facebook channel
Try Customer Service

Provide consent to access data to provision Omnichannel for Customer Service

Article • 08/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

This article provides information about the consent that's needed to access the different components and data during the installation and provision of Omnichannel for Customer Service.

Provide consent to access data

Omnichannel for Customer Service app requires the following permissions to read and write data on behalf of users:

- **Allow the application to read flows**: The app can access the flows if they have been used in macros.
- **Allow the application to manage flows**: The app can manage flows if they have been used in macros and to which you have access.
- **Access Microsoft Flow as signed in user**: Allows you to access Microsoft Flow as a signed-in user if flows have been used in macros.
- **Create content**: The app can automatically create content and datasets for you.
- **Read and write all dashboards**: The app can access and edit all your dashboards and any dashboards that you have access to.

- **Read and write all reports**: The app can access and edit all your reports and any reports that you have access to.
- **Read and write user settings and state**: The app can access and edit your user settings and the user-specific state associated with content you have access to.
- **Read and write all workspaces**: The app can access and edit all workspaces that you have access to.
- **Sign you in and read your profile**: Allows you to sign in to the app with your work account and let the app read your profile. It also allows the app to read basic company information.
- **Access Common Data Service as you**: Allows the app to access Microsoft Dataverse as you.

A detailed explanation is as follows:

- **Permissions Create content, Read and write all dashboard, Read and write all reports, Read and write user settings and state, and Read and write all workspaces**: During the provisioning of Omnichannel for Customer Service, "Omnichannel Insights for Dynamics 365" Power BI app is deployed to gain insights about your customer service omnichannel delivery performance and customer sentiment. The Power BI app consists of the following Power BI components. Omnichannel App needs the read and write permissions to deploy and interact with these components.
  - **Workspace**: Omnichannel Insights for Dynamics 365
  - **Dashboards**:
    - Omnichannel Insights for Dynamics 365
    - Omnichannel Sentiment Analysis (OCSA) for Dynamics 365
  - **Reports**: Omnichannel Insights for Dynamics 365
  - **Datasets**: Omnichannel Insights for Dynamics 365

  More information: Omnichannel Insights for Dynamics 365 - Power BI App | Omnichannel Insights Dashboard
- **Sign in and read your profile**: Allows Omnichannel to sign into the app with user's work account and let the app read the user profile. It also allows the app to read basic company information.
- **Access Common Data Service as you**:
  - **For Customer Service users**: Allows Customer Service to automatically create a non-licensed, non-interactive application user, and assign security roles to the

application user. This application user is primarily used to access omnichannel agents and supervisors characteristics, such as capacity, skill, and presence; configuration data such as workstreams and queues; and to sync queue item and conversation data with Dataverse.

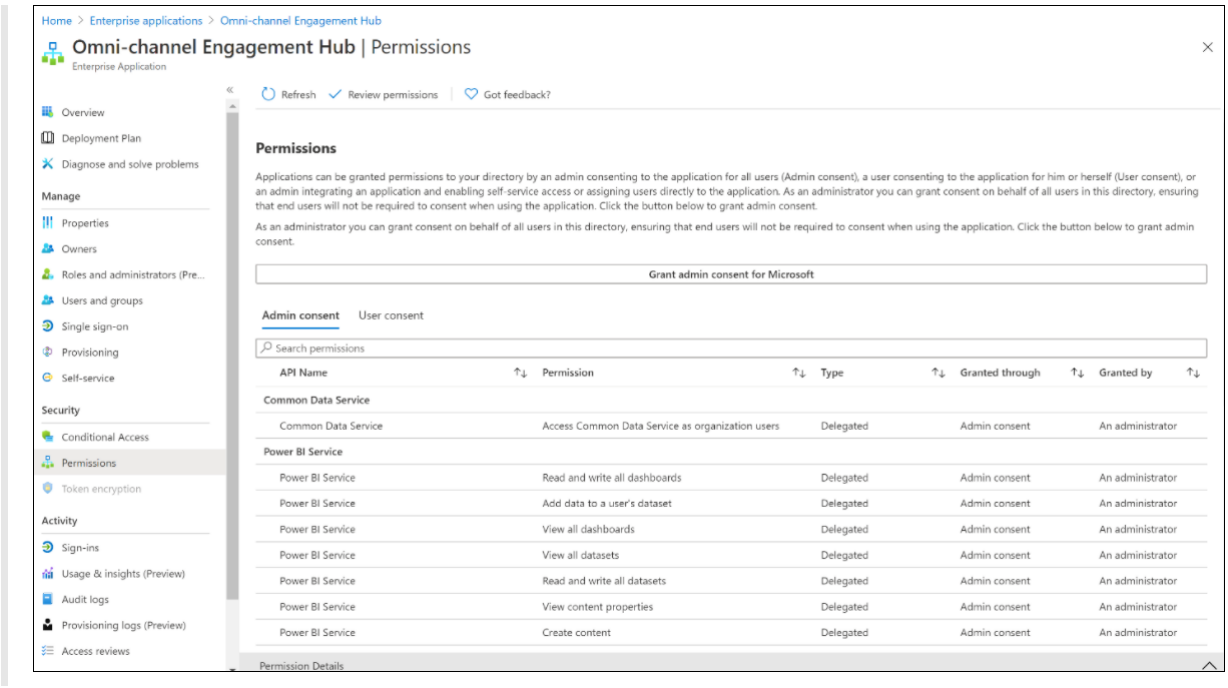
- **For Omnichannel for Customer Service users**: Allows Omnichannel for Customer Service to automatically create a non-licensed, non-interactive application user, and assign security roles to the application user. This application user is primarily used to access omnichannel agents' characteristics, such as capacity, skill, and presence, and to sync chat-related entities with Dataverse.

What happens when I provide data access consent and provision Omnichannel for Customer Service?

The following enterprise applications will be created in your Microsoft Entra ID and corresponding security permissions mentioned during data consent will get propagated to these apps. The Omnichannel Application User created in Dataverse will have reference to these AAD enterprise applications thereby helping it to interact with Dataverse and Omnichannel satellite services.

- Omni-channel Engagement Hub
- Omni-channel Engagement Hub APIs
- Omni-channel Engagement Hub Provisioning Application

A screenshot of the engagement hub is as follows.



FAQ

Why is an admin consent required? Is it only for giving consent to the delegated permissions that are listed? Or are more privileged operations performed in the tenant after the admin consent? If yes, which principals are created, and what roles or permissions are assigned?

Only the delegated permissions are required. On consent, the following two service principals are created:

– "Omnichannel APIs"

- "Omnichannel for Customer Service"

Why is the global admin role required, and not a less powerful one?

We need to add the service principal to Microsoft Entra ID for the tenant as a requirement, and therefore, we need global admin permissions.

Which are the Omnichannel principals? We found at least four Omnichannel principals.

“Omnichannel APIs” is the main application ID that's used for UI operations such as triggering provisioning of UR and loading the presence for an agent. “Omnichannel for Customer Service” is the app that has Dataverse permissions and is used to read data from Dataverse and write data to Dataverse for the Omnichannel service for the unified routing capability of classification and assignment.

The following applications were created as third-party applications. They'll be moved to be first-party Microsoft applications.

- “Omnichannel for CS Provisioning App Primary” is the first-party app equivalent of “Omnichannel APIs”.
- “Omnichannel for CS CRM ClientApp Primary” is the first-party app equivalent of “Omnichannel for Customer Service”.

How do all these principals interact with each other?

These four principals don't interact with each other.

Which principal performs the background automation that unified routing seemingly enables, and what permissions does it have?

The “Omnichannel for Customer Service” application. This app has Dataverse permissions that are used to read data from Dataverse and write data to Dataverse for Omnichannel service for the unified routing capability of classification and assignment.

See also

Provision Omnichannel for Customer Service
Provision unified routing for Customer Service

Overview of user management

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

To begin using Customer Service Hub, Customer Service workspace, and Omnichannel for Customer Service, each member of your organization will need a user account.

You'll use the Microsoft 365 admin center to create user accounts. The user account registers the user with Microsoft Online Services environment. In addition to registration with the online service, you must assign a license to the user account for the user to have access to the service.

When you assign a user the global administrator or the service administrator role in the Microsoft Online Services environment, it automatically assigns the user the System Administrator security role.

The topics in this section explain how to use the Microsoft 365 admin center to create security roles for users, and then how to use advanced settings in Omnichannel for Customer Service to create user roles to perform specific actions in the app.

See also

Manage users in Omnichannel for Customer Service
Manage capacity profiles
Role persona mapping

Create users

Article • 10/06/2023

You use the Microsoft 365 admin center to create user accounts for every user who needs access to apps, flows, or chatbots. The user account registers the user with Microsoft Online Services environment.

Create a user account

When you create a user account in the Microsoft 365 admin center, the system generates a user ID and temporary password for the user. You have the option to let the service send an email message to the user as clear text. Although the password is temporary, you might consider copying the information to send to the user through a more secure channel, such as from an email service that can digitally encrypt the contents.

For step-by-step instructions for creating a Microsoft Online Services user account, see Add users individually or in bulk.

> **Note**
>
> When you create a user and assign a license in the Microsoft 365 admin center, the user is also created in customer engagement apps. It can take a few minutes to complete the synchronization process between the Microsoft 365 admin center and customer engagement apps.
>
> By entering a user ID and password, a user can access the Microsoft 365 admin center to view information about the service. However, the user won't have access to customer engagement apps until the user has a security role assigned either directly or indirectly as a member of a **group team**.

> **Tip**
>
> To force an immediate synchronization between the Microsoft 365 admin center and customer engagement apps, do the following:
>
> - Sign out of the customer engagement app and the Microsoft 365 admin center.

- Close all open browsers used for the customer engagement app and the Microsoft 365 admin center.
- Sign back in to the customer engagement app and the Microsoft 365 admin center.

User types

Regular users

These are the regular synchronized users from Azure Active Directory (Azure AD).

Application users

Identified by the presence of ApplicationId attribute in the system user record. To check the Azure AD application ID, see View or edit the details of an application user.

Non-interactive users

- License specific provisioning business rules does not apply to these users after they are marked as non-interactive. Note: security group specific rules still apply.
- Cannot access Microsoft Dataverse web interface or admin portals.
- Can only access Dataverse via SDK/API calls.
- There is a maximum limit of 7 non-interactive users per instance.

Support user

See System and application users.

- Not synchronized with Azure AD, and created by Dataverse out of the box.
- Placeholder user record for all of the internal Microsoft support users.
- Key identifiers:
  - UPN value is crmoln@microsoft.com.
  - Access mode value is 3.
- All Microsoft support users will be mapped to this well-known record at runtime.

Delegated administrator

See the following:
For partners: the Delegated Administrator

System and application users

- Not synchronized with Azure AD, and created by Dataverse out of the box.
- Placeholder user record for all of customer's delegated admin partner users to access Dataverse as delegated administrators.
- Key identifiers:
  - UPN value is crmoln2@microsoft.com.
  - Access mode value is 5.
- All the delegated admin partner users will be mapped to this well-known record at runtime.

User profile information

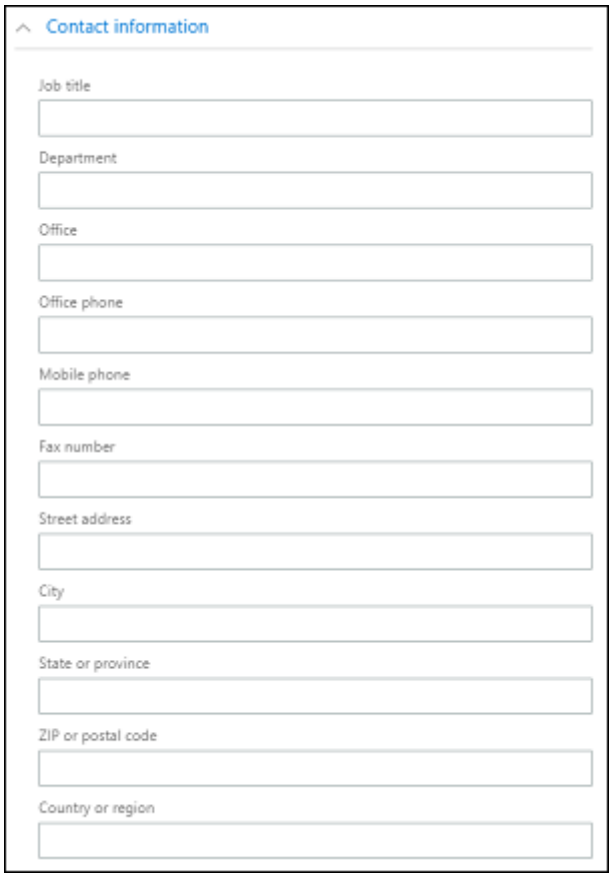
Some user profile information is maintained and managed in the Microsoft 365 admin center. After you create or update a user, these user profile fields are automatically updated and synchronized in your Microsoft Power Platform environments.

The following table shows the fields that are managed in the **Users** section of the Microsoft 365 admin center.

Customer engagement apps user form	**Microsoft 365/Azure AD user**
User Name	Username
Full Name*	Display Name
Title	Job title
First Name	First Name
Last Name	Last Name
Primary Email**	Email
Main Phone	Office phone
Mobile Phone	Mobile phone
Fax	Fax number
Address	Street address
Address	City
Address	State or province
Address	Country or region

Customer engagement apps user form	Microsoft 365/Azure AD user
AzureActiveDirectoryObjectId***	ObjectId
* Full Name isn't automatically updated and synchronized with customer engagement apps. ** To prevent data loss, the Primary Email field isn't automatically updated and synchronized with customer engagement apps. *** object ID of a user or a service principal in Azure Active Directory.	

The following image shows Microsoft 365 user contact fields.

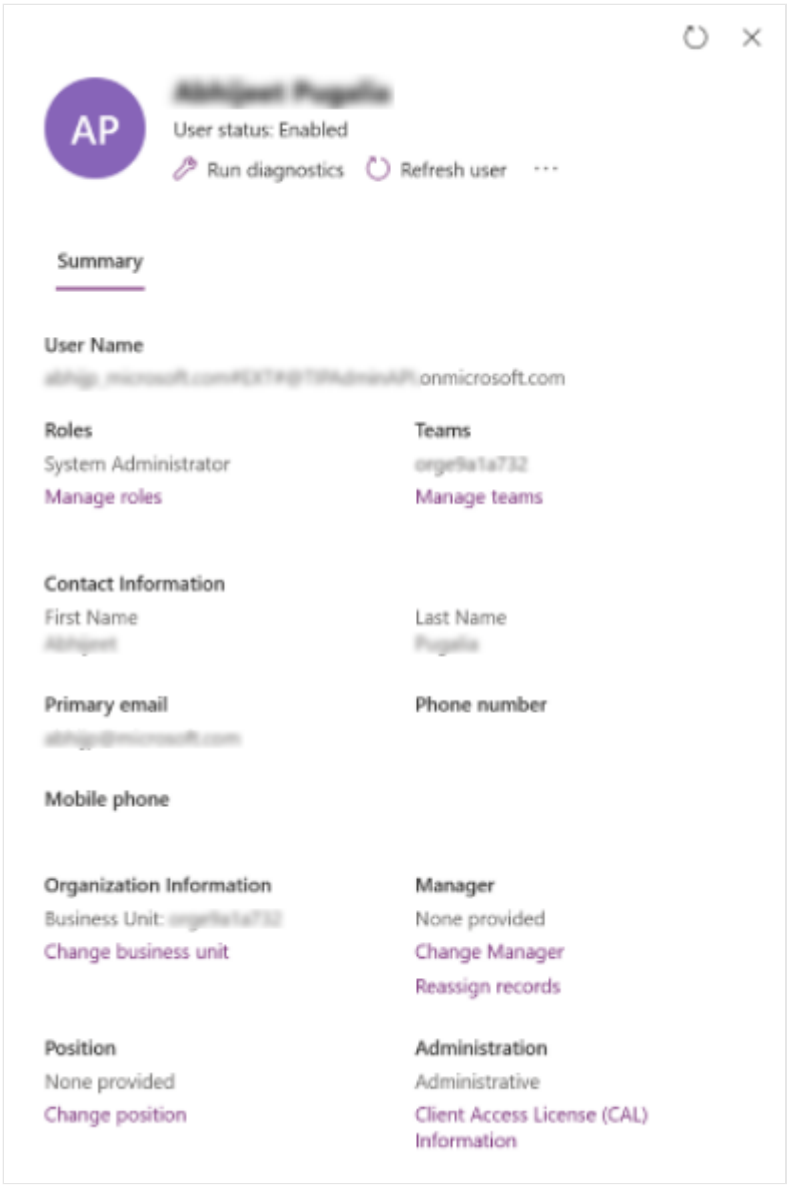


View and edit a user profile

To view and edit a user's profile in the Power Platform admin center:

1. Select an environment and go to **Settings** > **Users + permissions** > **Users**.
2. Select a user in the list.

On the user profile page you can view and make changes to important user profile information such as Security Roles, Team membership, Business Unit, Manager, Position, and more. You can also **Run diagnostics** to troubleshoot access issues or **Refresh User** to re-sync from Azure Active Directory.



Add a license to a user account

You can license the user when you create the user account, or you can license the user later. You must assign a license to every user account that you want to access the online service. See Assign licenses.

Assign a security role

Security roles control a user's access to data through a set of access levels and permissions. The combination of access levels and permissions that are included in a specific security role sets limits on the user's view of data and on the user's interactions with that data. See Assign a security role to a user.

Enable or disable user accounts

User enablement and disablement only applies to environments that have a Dataverse database. To enable a user in an environment that has a Dataverse database, ensure that they're allowed to sign in, assign a license to the user, and then add the user to the security group that's associated with the environment. These are the same criteria used to add users to an environment.

To enable a user, assign a license to the user and add the user to the security group that's associated with an environment. If you enable a user account that was disabled, you must send a new invitation for the user to access the system.

To disable a user account, remove a license from the user or remove the user from the security group that's associated with an environment. Removing a user from the security group doesn't remove the user's license. If you want to make the license available to another user, you have to remove the license from the user account that was disabled.

> **Note**
>
> You can also remove all security roles from a user to prevent the user from signing in to and accessing customer engagement apps. However, this doesn't remove the license from the user, and the user will remain in the list of enabled users. We don't recommend using this method to remove access from a user.
>
> When you use a security group to manage enabling or disabling users or provisioning access to an org, nested security groups within the selected security group aren't supported and will be ignored.
>
> You can **assign records** to a disabled user account and also **share reports** and accounts with them. This can be useful when migrating on-premises versions to online. If you need to assign a security role to users who have a Disabled status, you can do so by enabling the allowRoleAssignmentOnDisabledUsers in **OrgDBOrgSettings**.
>
> A Global admin, Power Platform admin, or a Dynamics 365 admin does not need a license to be enabled in an environment. See: **Global admins and Power Platform admins can administer without a license**. But since they are unlicensed, they will be set in the **Administrative access mode**.

You must be a member of an appropriate administrator role to do these tasks. More information: Assign admin roles

Enable a user account in an environment

To enable a user in an environment that has a Dataverse database, you enable sign-in for the user, assign a license to the user, and then add the user to a security group.

To enable sign-in

1. Sign in to the Microsoft 365 admin center.
2. Select **Users** > **Active users**, and then select the user.
3. Ensure that under the user's display name, you see **Sign in allowed**. If you don't, select **Block this user**, and then unblock sign in.

To assign a license

1. Sign in to the Microsoft 365 admin center.
2. Select **Users** > **Active users**, and then select the user.
3. Select the **Licenses and Apps** tab, and then select the licenses you want to assign.
4. Select **Save changes**.

To add a user to a security group

1. Sign in to the Microsoft 365 admin center.
2. Select **Teams & groups** > **Active teams & groups**.
3. Select the security group that's associated with your environment.
4. Select the **Members** tab.
5. Under **Members**, select **View all and manage members** > **Add members**.
6. Choose users from the list or search for users, and then select **Save**.

Disable a user account in an environment

To disable a user account in an environment that has a Dataverse database, you can either remove the user from the security group or remove the license from the user.

To remove a user from a security group

1. Sign in to the Microsoft 365 admin center.
2. Select **Teams & groups** > **Active teams & groups**.
3. Select the security group that's associated with your environment.
4. Select the **Members** tab.
5. Under **Members**, select **View all and manage members**
6. Select the users in the list to remove them, and then select **Save**.

To remove a license from a user

1. Sign in to the Microsoft 365 admin center.
2. Select **Users** > **Active users**, and then select the user.
3. Select the **Licenses and Apps** tab, and then select the licenses you want to remove.
4. Select **Save changes**.

Note that removing a license from a user might not always result in disabling the user account, though the license will be freed up for assigning to another user. The recommended approach to disabling a user account in an environment is to remove them from the security group that's associated with the environment.

> **Note**
>
> You can also delete users in the Microsoft 365 admin center. When you remove a user from your subscription, the license assigned to that user automatically becomes available to be assigned to a different user. If you want the user to still have access to other applications you manage through Microsoft 365—for example, Microsoft Exchange Online or SharePoint—don't delete them as a user. Instead, simply remove the license you've assigned to them.
>
> When you sign out of the Microsoft 365 admin center, you aren't signing out of customer engagement apps. You have to do that separately.

> **Tip**
>
> To force an immediate synchronization between the Microsoft 365 admin center and customer engagement apps, do the following:
>
> - Sign out of the customer engagement app and the Microsoft 365 admin center.
> - Close all open browsers used for the customer engagement app and the Microsoft 365 admin center.
> - Sign back in to the customer engagement app and the Microsoft 365 admin center.

Add users to Dataverse

For users to have access to applications and data in an environment, at a minimum the SystemUser table in Dataverse must have a record corresponding to the respective user

identity. There are different mechanisms to add users in Dataverse, either automatic or on demand:

> **Tip**
>
> Check out the following video: **Adding users to Dataverse**.

1. A system background process runs periodically to synchronize changes from Azure AD and updates the SystemUser records in Dataverse based on pre-determined set of requirements. The time taken to synchronize all changes into Dataverse is dependent on total number of users must be added or updated. For large organizations with thousands of users in Azure AD, we recommend creating security groups associated with each environment, so only the required subset of users is added into Dataverse.

   > **Note**
   >
   > Not all users added in Azure AD will be pickup by the automatic synchronization process. **This section** details the eligibility criteria the system background process applies to add a user from Azure AD into Dataverse.

2. If users already exist in Azure AD, they are automatically added to SystemUsers table at first attempt to access the environment. Note that if a user already exists in Dataverse, but in a disabled state, attempting to access the environment will result in the user's state to be updated to "enabled", assuming they are entitled at the time of access.

3. Users that have the necessary permissions, can use the API to add or update users in Dataverse on demand.

4. Administrators can leverage the Power Platform admin center user management experience to add users in Dataverse on demand.

Categories of users not added automatically in Dataverse

In certain conditions, the above-mentioned system background process is not adding users automatically into Dataverse. In these cases, users will be added on demand either when they first attempt to access the environment or by an administrator using the API or the Power Platform admin center. These conditions are:

1. Users are part of a Dataverse for Teams environment type.
2. Users are part of an environment with a Dataverse database and have a free Dataverse service plan from Microsoft 365 licenses.
3. Users are part of an environment with a Dataverse database and environment level app-pass license type.

> ⓘ **Note**
>
> Users cannot be added to SystemUser table either automatically or on demand in case of environments without Dataverse database.

Requirements for successfully adding users in Dataverse

Below criteria must be met for successfully adding the user in the Dataverse table:

1. User must be enabled and not deleted or soft-deleted in Azure AD. User must be enabled in Azure AD to be enabled in a Dataverse database. If user is added to Dataverse and then deleted in Azure AD, the state in the Dataverse table will be updated to “disabled”.

2. User must have a valid license with these exceptions:
   a. Admin users do not require a license. Unlicensed Azure AD admins are enabled in the systems as “Setup user” and have administrative only access mode.
   b. Individual users do not need to have a license when the environment has app pass capacity. This only applies to adding users on demand (either at first attempt to access the environment or through API/Power Platform admin center).
   c. Individual users do not need to have a license when the tenant they are part of has a tenant level Marketing license. This only applies to adding users on demand (either at first attempt to access the environment or through API/Power Platform admin center).
   d. Non-interactive users do not need a license
   e. Free Dataverse plans from Microsoft 365 license are honored when users added on-demand (either at first attempt to access the environment or through API/Power Platform admin center)

> ⓘ **Note**

Guest users should also have a license from the environment's tenant. License from Guest user's tenant is NOT considered as valid license.

3. If the environment has a security group defined, user must be part of the respective security group, unless the user is a Tenant or Power Platform Administrator. Non-admin users or Dynamics 365 service admin must be in the security group to access the system. When the owner of the security group is added to Dataverse through an on-demand action, the user will be considered a valid member of the security group and will be added to Dataverse successfully.

Adding users to Dataverse has different implications depending on the environment type:

1. If users are part of a trial environment, then they will not need email approval for being added to Dataverse. Users will only be added to Dataverse on demand. The background sync process will still run to keep the users in the environment up-to-date, but will not add users automatically.

2. Only the initial user that created the developer environment type will be added to Dataverse.

3. Users that are part of a Dataverse for Teams environment will only be added to Dataverse's SystemUser table as result of the user's first attempt to access the environment.

Create a Read-Write user account

By default, all licensed users are created with an access mode of **Read-Write**. This access mode provides full access rights to the user based on the security privileges that are assigned.

To update the access mode of a user

1. In the Power Platform admin center, select an environment, and go to **Settings** > **Users + permissions** > **Users**.
2. Select **Enabled Users**, and then open a user from the list.
3. On the user pane command bar select **...** > **Manage user in Dynamics 365**.
4. In the user form, scroll down under **Administration** to the **Client Access License (CAL) Information** section. In the **Access Mode** list, select **Read-Write**.
5. Select the **Save** icon.

Create an Administrative user account

An Administrative user is a user who has access to the Settings and Administration features but has no access to any of the functionality. Use this account to assign administrative users to perform day-to-day maintenance functions (create user accounts, manage security roles, and so on). Because an administrative user doesn't have access to customer data nor any functionality, the user doesn't require a license (after setup).

You need to have the System Administrator security role or equivalent permissions to create an administrative user. First, you'll create a user account in Microsoft 365, and then in to the customer engagement app, select the **Administrative** access mode for the account.

> ⓘ **Note**
>
> Any admin user with the Global admin, Power Platform admin, or Dynamics 365 Service admin role will receive the **Administrative** access mode as long as there are no user licenses assigned. This is true regardless of enabling app-passes or pay-as-you-go use at the tenant level.
>
> See **Create an administrative user and prevent elevation of security role privilege** for an example of how an Administrative user account can be used.

1. Create a user account in the Microsoft 365 admin center.

   Be sure to assign a license to the account. You'll remove the license (in step 12) after you've assigned the **Administrative** access mode.

2. In the **Optional settings** form, expand **Roles**.

3. Clear the **User (no administrator access)** check box.

4. Scroll down the form, and then select the **Show all** link.

5. Select the **service administrator** check box. **Note:** If you've selected **Global Administrator**, you don't need to select this option.

Wait for the user to sync to the environments.

6. In the Power Platform admin center, select an environment, and go to **Settings** > **Users + permissions** > **Users**.

7. Select **Enabled Users**, and then open a user from the list.

8. On the user pane command bar select **...** > **Manage user in Dynamics 365**.
9. In the user form, scroll down under **Administration** to the **Client Access License (CAL) Information** section. In the **Access Mode** list, select **Administrative**.

   Now you need to remove the license from the account.
10. Go to the Microsoft 365 admin center.
11. Select **Users** > **Active Users**.
12. Select the Administrative user account, and then select the **Licenses and Apps** tab.
13. Clear the license box(es), and then select **Save changes**.

Create a non-interactive user account

The non-interactive user isn't a "user" in the typical sense—it doesn't represent a person, it's an access mode that's created by means of a user account. It's used for programmatic access to and from customer engagement apps between applications. A non-interactive user account lets these applications or tools—such as a connector from customer engagement apps to ERP—authenticate and access customer engagement apps without requiring a license. For each environment, you can create up to seven non-interactive user accounts.

You need to have the System Administrator security role or equivalent permissions to create a non-interactive user. First, you'll create a user account in Microsoft 365. Then, in customer engagement apps, select the non-interactive access mode for the account.

1. Create a user account in the Microsoft 365 admin center.

   Be sure to assign a license to the account.
2. In the Power Platform admin center, select an environment, and go to **Settings** > **Users + permissions** > **Users**.
3. Select **Enabled Users**, and then open a user from the list.
4. On the user pane command bar select **...** > **Manage user in Dynamics 365**.
5. In the user form, scroll down under **Administration** to the **Client Access License (CAL) Information** section. In the **Access Mode** list, select **Non-interactive**.

   You then need to remove the license from the account.
6. Go to the Microsoft 365 admin center.

7. Select **Users** > **Active Users**.
8. On the **Licenses and Apps** tab, select the non-interactive user account.
9. Clear the license box(es), and then select **Save changes**.
10. Go back to the customer engagement app and confirm that the non-interactive user account **Access Mode** is still set for **Non-interactive**.

Create an application user

You can use server-to-server (S2S) authentication to securely and seamlessly communicate between Dataverse and your web applications and services. S2S authentication is the common way that apps registered on Microsoft AppSource use to access the Dataverse data of their subscribers. All operations performed by your application or service by using S2S will be performed as the application user you provide, rather than the user who's accessing your application.

All application users are created with a non-interactive user account, however they aren't counted toward the limit of seven non-interactive user accounts. In addition, there's no limit on how many application users you can create in an environment.

> **⊗ Caution**
>
> For an application user, the system adds a "#" as the First Name for the Application User you create. This is by design.

For step-by-step information about creating an application user, see Create an application user.

Enable or disable application users

When application users are created, they're automatically enabled. The default **Application User** form shows the status in the form footer; the **Status** field can't be updated.

You can customize the default **Application User** form to allow updates to the **Status** field so that you can enable or disable application users, if required. For step-by-step information about customizing the default **Application User** form, see Enable or disable application users.

> ⊗ **Caution**
>
> Disabling an application user will break all the integration scenarios that use the application user.

Manage application users in the Power Platform admin center

We are in the process of moving application user management from the legacy web client as documented in Enable or disable application users. See the following topic for managing application users from the Power Platform admin center: Manage application users in the Power Platform admin center.

How stub users are created

A stub user is a user record that has been created as a placeholder. For example, records have been imported that refer to this user but the user doesn't exist in customer engagement apps. This user can't sign in, can't be enabled, and can't be synchronized to Microsoft 365. This type of user can only be created through data import.

> ⊗ **Caution**
>
> To prevent creating duplicate user records with the same UPN or throw errors during data import workflows, synchronize the users from Entra ID to Dataverse before running data import.

A default security role is automatically assigned to these imported users. The **Salesperson** security role is assigned in an environment and the **Basic User** security role is assigned in a Power Apps environment.

> ⓘ **Note**
>
> By default, a security role can only be assigned to users with an Enabled status. If you need to assign a security role to users who have a Disabled status, you can do so by enabling the allowRoleAssignmentOnDisabledUsers **OrgDBOrgSettings**.

Update a user record to reflect changes in Azure AD

When you create a new user or update an existing user in Dynamics 365 Customer Engagement (on-premises), some fields in the user records, such as name and phone number, are populated with the information obtained from Active Directory Domain Services (AD DS). After the user record is created, no further synchronization occurs between Azure AD user accounts and customer engagement apps user records. If you make changes to the Azure AD user account, you must manually edit the user record to reflect the changes.

1. In the Power Platform admin center, select an environment, and go to **Settings** > **Users + permissions** > **Users**.
2. In the list, select the user record you want to update, and then select **Edit**.

The following table shows the fields that are populated on the user form (user record) from the Azure AD user account.

User form	Active Directory user	Active Directory object tab
User name	User logon name	Account
First name	First name	General
Last name	Last name	General
Main Phone	Telephone number	General
Primary Email	Email	General
Address*	City	Address
Address*	State/province	Address
Home phone	Home	Telephones
* The Address field comprises the values from the City and State/province fields in Azure AD.		

FAQ

If a user that is added to Dataverse SystemUser table becomes disabled or unlicensed in Azure AD, how is that reflected in Dataverse?

User record is not deleted, but its state in Dataverse will be updated to “disabled”.

Are all users in Azure AD being added to Dataverse?

Users from Azure AD are added to Dataverse only if they meet the criteria. If already existing users do not meet the criteria, their state will be updated to “disabled”,

How can the admin increase the performance of adding users in Dataverse?

Assigning an Azure AD security group to the environment is a best practice in general, that can also result in a performance increase as regard to adding users that are part of the security group to Dataverse.

See also

User settings
Get started with security roles in Dataverse
Assign a security role to a user
Opt-out of automatic license-based user roles management

Assign roles and enable users for Omnichannel for Customer Service

Article • 05/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Use the information in this article to configure security roles and enable users to perform the various tasks in Customer Service.

Roles in Omnichannel for Customer Service

The Dynamics 365 users can access and perform different functions based on the roles that are assigned to them. The following roles can be assigned individually or in combination based on the tasks that need to be performed:

- **Basic User:** Required by all users of Omnichannel for Customer Service.
- **Omnichannel administrator:** Required for performing administrator tasks; also requires the **System Administrator** role to manage user roles and privileges in Omnichannel for Customer Service.
- **Omnichannel supervisor:** Required for performing supervisor tasks.
- **Omnichannel agent:** Required for performing agent tasks.
- **Productivity tools user:** Required by users of Dynamics 365 Productivity Tools.
- **Productivity tools administrator:** Required by administrator users of Dynamics 365 Productivity Tools.
- **App Profile Manager Administrator:** Required for creating and assigning app profiles to users of Customer Service and Omnichannel for Customer Service.
- **App Profile User:** Required by users of Customer Service and Omnichannel for Customer Service.

For information on the App Profile Manager Administrator and App Profile User roles, see Roles and privileges associated with app profile manager

Ensure that the **Omnichannel API access** role isn't assigned to a supervisor or agent type of user.

Additionally, the **Customer Service Representative** role is required to work with the Case entity.

Use the Microsoft 365 admin center to create user accounts for every user who needs access to Omnichannel for Customer Service. For more information, see Create users and assign security roles.

Assign roles to users

To be able to map roles to personas in role persona mapping, you must assign the roles to users directly and not through team memberships. For more information about role persona mapping, see Role persona mapping.

Perform the following steps to assign roles to users in the advanced settings area of Dynamics 365:

1. Select **Settings** > **Advanced Settings** on the command bar. The **Settings** page is displayed in a new browser tab.
2. Select **Settings** > **Security** > **Users**.
3. Select the users from the list for whom you want to assign a security role.
4. Select **Manage Roles** in the menu. The security roles available for the business unit are displayed.
5. In the **Manage User Roles** dialog box, select the security roles that you want to assign to the user, and then select **OK**.

To view and manage users in omnichannel for Customer Service, see Manage users in Omnichannel for Customer Service.

Understand roles and their privileges

Each role in Omnichannel for Customer Service can perform a set of actions based on the privileges that are listed as follows.

Privileges	Omnichannel administrator	Omnichannel supervisor	Omnichannel agent	Productivity tools user	Productivity tools administrator
Can view user list/presence list/workstream list/queue list/PBI config list	Yes	Yes			
Can edit roles of a user	Yes				
Can edit default presence and default capacity of a user	Yes	Yes			
Can edit queue assignment of a user	Yes	Yes			
Can add/edit/delete presence	Yes				
Can add/remove users from presence	Yes	Yes			
Can add/edit/delete presence associations	Yes				
Can add/edit/delete workstreams	Yes				
Can add/edit/delete channel settings, context settings, routing rules	Yes				
Can add/edit/delete queues	Yes				
Can add/remove agents from queue	Yes	Yes			
Can add/edit/delete bots	Yes				
Can view/add/edit/delete quick replies	Yes	Yes			

Privileges	Omnichannel administrator	Omnichannel supervisor	Omnichannel agent	Productivity tools user	Productivity tools administrator
Can add/edit/delete PBI config	Yes				
Can view/add/edit/delete operating hours	Yes				
Can view/add/edit/delete auth settings	Yes				
Can view operating hours		Yes			
Can monitor, assign, and transfer conversations		Yes			
Can view user list/presence list/workstream list/queue list			Yes		
Can view quick replies			Yes		
Can read agent script				Yes	
Can read agent script step				Yes	
Can read workflow				Yes	
Can read `msdyn_actioninputparameter`				Yes	Yes
Can read `msdyn_actionoutputparameter`				Yes	Yes
Can read `msdyn_inputparameters`				Yes	Yes
Can read `msdyn_macroconnector`				Yes	Yes
Can read `msdyn_parameterdefinition`				Yes	Yes
Can read `msdyn_designeroptions`				Yes	Yes
Can read `msdyn_macroactiontemplate`				Yes	Yes
Can read macro action				Yes	
Can create/read/write/append/delete agent script					Yes
Can create/read/write/append/delete agent script step					Yes
Can create/read/write/append/delete agent script workflow					Yes
Can read `msdyn_macrosolutionconfiguration`					Yes
Can create/read/write/append/delete macro action					Yes

Configure permissions to access secure columns

Administrator users will need column-level permissions on secure columns when they configure the following features and channels:

- Authentication settings
- Azure Communication Services
- Geographical location providers
- Google's Business Messages channel
- Payment profiles for Apple Messages for Business channel
- SMS channels through TeleSign and Twilio
- WeChat channel
- WhatsApp channel

The secure columns can be identified by the information icon that's present for the column.

The entities and their secret attributes are as follows. For more information on the entities and their attributes, see Overview of entities.

Entity	Secret attributes
msdyn_authenticationsettings	msdyn_authenticationclientsecret
msdyn_liveworkstream (for SMS)	msdyn_secureapikey
msdyn_ocapplepay	msdyn_ocbase64merchantcertstring msdyn_ocbase64merchantcertstringcontd msdyn_ocmerchantcertificatepassword
msdyn_ocbotchannelregistrationsecret	msdyn_securemsappsecret
msdyn_occommunicationprovidersetting	msdyn_securesecret
msdyn_oc_geolocationprovider	msdyn_secureproviderapikey
msdyn_ocgooglebusinessmessagesagentaccount	msdyn_agentaccountclienttoken
msdyn_ocgooglebusinessmessagespartneraccount	msdyn_partneraccountclienttoken msdyn_base64credentialfilestring msdyn_base64credentialfilestringcontd
msdyn_ocsmssettingsecret	msdyn_secureapikey
msdyn_octwitterapplication	msdyn_securetwitterconsumersecret msdyn_securetwitterconsumerkey
msdyn_octwitterhandlesecret	msdyn_useraccesstoken msdyn_useraccesstokensecret
msdyn_ocwechatchannelconfig	msdyn_secureapplicationsecret msdyn_securetoken msdyn_secureencodingaeskey
msdyn_ocwhatsappchannelaccount	msdyn_secureauthentiationtoken

Manage permissions on secret attributes

1. In Power Platform admin center, create or update the column security profile. More information: Associate security profiles and set permissions

2. Provide the read, update, or create permissions to the security profile on the columns that correspond to the secret attributes mentioned in the preceding table.

See also

Provision Omnichannel for Customer Service
Roles and privileges associated with app profile manager
Manage users in Omnichannel for Customer Service
Role personas for unified routing
Guide agents with scripts
Automate tasks with macros

Use the enhanced experience to manage users

Article • 10/23/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Use the information in this article to manage your agent users for Customer Service. The enhanced user management experience is a simplified UI that eases the complexity of configuring the various settings required for your agent users to provide customer service optimally.

You can manage the following settings for the users in bulk:

- Skills
- Queues
- Capacity profiles
- Swarming

On the user management page, the following three views are available:

- **Contact center users**: Lists users who are assigned the agent, supervisor, or admin persona.
- **All users**: Lists all the Customer Service users.
- **Swarm experts**: Lists users who are assigned to be swarm experts.

The enhanced user management experience is available in Customer Service admin center only.

Manage contact center users

The attributes that you want to add must be configured in the system. You can update up to 200 users in a single step. For the selected users, you can update up to five attributes in a single step. If you need to update more than five attributes for the selected users, you can save the changes and then update the next set of attributes.

1. Sign in to Dynamics 365, and go to the Customer Service admin center app.

2. Select **User management** under **Customer support** in the site map.

3. On the page that appears, select **Manage** for **Enhanced user management**. The **Contact center users** view displays the users that have been configured in Power Platform admin center.

4. Hover the pointer over the rows of the users that you want to update and select the check boxes.

5. To update user attributes, select **Update user attributes**, and select one of the following options:

    - **Update skills**: On the dialog box that appears, do the following:
        - **Add skills to users:** In the **Skills** box, select the skills that you want to add, select a proficiency, and then select **Add to all**. The selected skill and proficiency is added for the users in the list. To have a different proficiency for the skills, select one skill and proficiency at a time.
        - **Activate or deactivate**: Select a skill in the **Skills** box, and select the ellipses to select **Activate for all** or **Deactivate for all**. Users with a deactivated skill will not be considered during assignment if the skill requirement of a work item matches the deactivated skill.
        - **Remove skills**: To remove a skill from the list of users, select the skill in the **Skills** box, and select **Remove from all**. Save your changes. The selected skills are removed for the users.

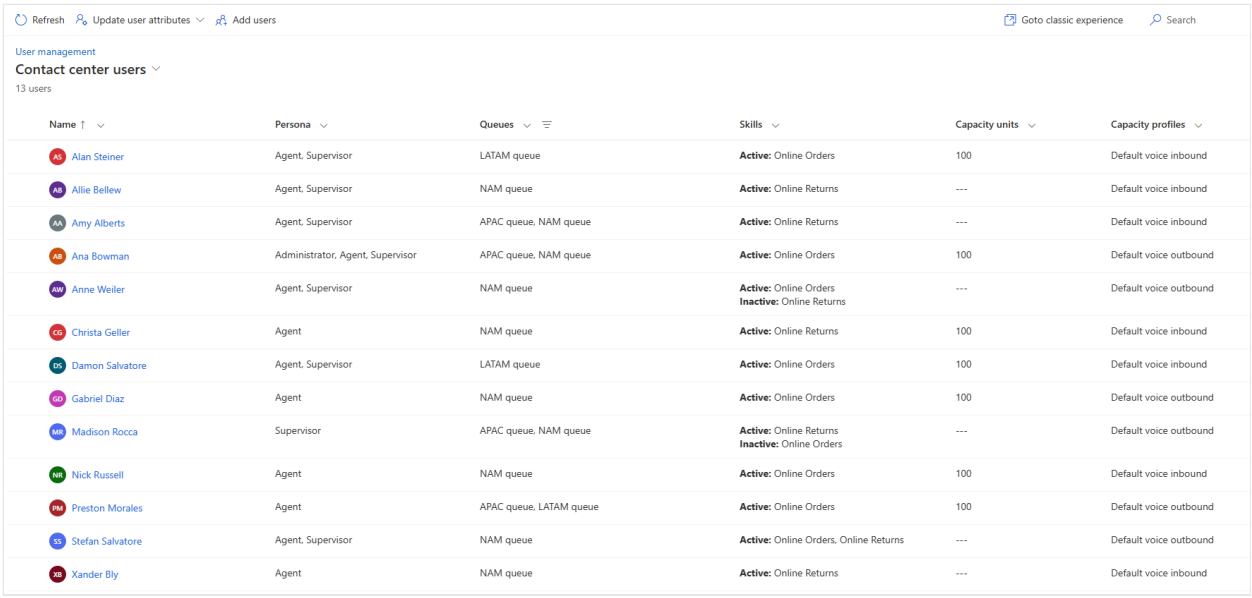
    - **Update queues**: On the dialog box that appears, in the **Queues** box, select the queues to add or remove, and then select **Add to all** or **Remove from all**. Save your changes.

    - **Update capacity**: On the dialog box that appears, in the **Capacity profiles** box, select the profiles that you want to add or remove, and then select **Add to all** or **Remove from all**. Save your changes.

6. To add users as swarm experts, select **Swarming** and then select **Add as swarm expert**.

7. If you want to see the list of swarm experts, select the **Swarm experts** view. More information: Configure customer support swarming

The users and their updated attributes will be displayed in the **Contact center users** view.



Name	Persona	Queues	Skills	Capacity units	Capacity profiles
Alan Steiner	Agent, Supervisor	LATAM queue	**Active:** Online Orders	100	Default voice inbound
Allie Bellew	Agent, Supervisor	NAM queue	**Active:** Online Returns	---	Default voice inbound
Amy Alberts	Agent, Supervisor	APAC queue, NAM queue	**Active:** Online Returns	---	Default voice inbound
Ana Bowman	Administrator, Agent, Supervisor	APAC queue, NAM queue	**Active:** Online Orders	100	Default voice outbound
Anne Weiler	Agent, Supervisor	NAM queue	**Active:** Online Orders **Inactive:** Online Returns	---	Default voice outbound
Christa Geller	Agent	NAM queue	**Active:** Online Returns	100	Default voice inbound
Damon Salvatore	Agent, Supervisor	LATAM queue	**Active:** Online Orders	100	Default voice inbound
Gabriel Diaz	Agent	NAM queue	**Active:** Online Orders	100	Default voice outbound
Madison Rocca	Supervisor	APAC queue, NAM queue	**Active:** Online Returns **Inactive:** Online Orders	---	Default voice outbound
Nick Russell	Agent	NAM queue	**Active:** Online Orders	100	Default voice inbound
Preston Morales	Agent	APAC queue, LATAM queue	**Active:** Online Orders	100	Default voice outbound
Stefan Salvatore	Agent, Supervisor	NAM queue	**Active:** Online Orders, Online Returns	---	Default voice outbound
Xander Bly	Agent	NAM queue	**Active:** Online Returns	---	Default voice inbound

Manage users using the classic experience

Users should be configured as a bookable resource so that they can be assigned work items by using unified routing.

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **User management** in **Customer support**.

   b. On the **User management** page, select **Manage** for **Users**.

2. On the **Omnichannel Users** page, double-click a user in the list.

3. Select the **Omnichannel** tab.

4. Specify the following in the user page.

Section	Field	Description	Example value
User Details	Capacity	If capacity units is configured, allocate a value that indicates the capacity of the agent. For information: Capacity.	100
User Details	Default Presence	Assign a default presence status for agent. This is the status that the agent is logged in with, in the Omnichannel for Customer Service app.	

5. Select **New Bookable Resource** under the **Skills Configuration** section. The **New Bookable Resource** page appears.

6. Do the following:

   a. Specify the name of agent in the **Name** field.

   b. Select **Save**. The **Work Hours** tab is enabled.

> **Important**
>
> To add the work hours for a bookable resource, universal resource scheduling must be available in your organization. Universal resource scheduling is available with Dynamics 365 Field Service, Dynamics 365 Project Service, or Dynamics 365 Service Scheduling. More information: **Overview of Service Scheduling**

   a. You can update the existing work hours or create work hours for the user.

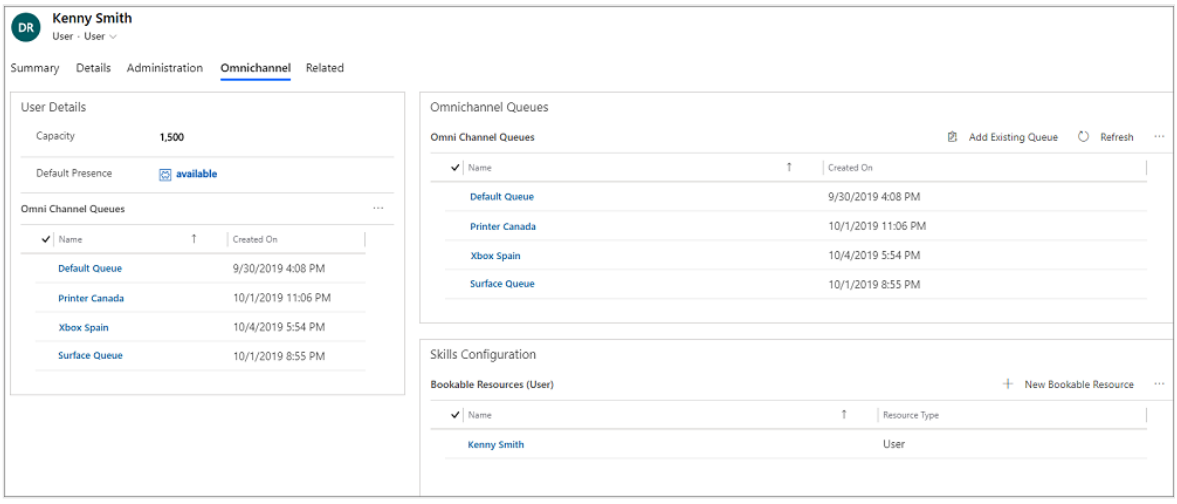
   b. On the **Omnichannel** tab of the **Bookable Resource** page for the user, select **New Bookable Resource Characteristic**.

   c. In **Skill Name**, search for and select a skill.

   d. In **Rating Value**, select the rating value that the user has on the skill.

   e. Save and close to return to the **Omnichannel** tab of the **User** page.

7. If capacity profile is configured, in the **Capacity** area, select **Add Existing Capacity Profile**, and select a profile in the list.



8. To use the user schedule for assignment, set up the bookable resource calendar. More information: Apply a calendar to a resource

9. Add the user to the required queue that's configured for unified routing. More information: Configure queues for unified routing

> **Note**
>
> Bots in a queue are modeled as a bookable resource and therefore will be considered for assignment. However, we recommend that you don't add bots to queues that are used for routing records.

All users who are assigned the **Omnichannel administrator**, **Omnichannel supervisor**, or **Omnichannel agent** security role can use Omnichannel for Customer Service.

For more information on how to create users and assign security roles, see Assign roles and enable users for Omnichannel for Customer Service.

For users to access the Omnichannel for Customer Service experiences, the roles that you map to personas in role persona mapping must be assigned to the users directly and not through team memberships. For more information about role persona mapping, see Role persona mapping.

Capacity

Capacity is the arbitrary scale that you choose and set for each of the work streams corresponding to the channels. The capacity assigned to the agent must be a multiplier of the capacity unit that you have defined for the associated workstream. Check the capacity unit defined for the workstreams to determine the value that must be assigned to your agents.

For example, if the capacity unit is 1 for a workstream and you want an agent to be able to take up to 3 conversations simultaneously, the capacity that you assign to the agent should be 3 units. Similarly, if your capacity unit is 5 for the work stream and you want the agent to be able to take up to 3 conversations simultaneously, you should assign 15 units as the capacity for the agent. You can also define capacity profiles. However, we recommend that you use either capacity units or capacity profiles in your environment, and not both. More information: Create and manage capacity profiles.

See also

Work with queues in Omnichannel for Customer Service
Configure and manage presence status

Role personas for unified routing

Configure custom limits in capacity profiles

Create and manage capacity profiles

Article • 10/23/2023

You can create capacity profiles and assign them to agents to define the types and amount of work they can take. Capacity profiles contain information, such as the amount of work, concurrent or daily capacity, and whether other channels are affected.

- Capacity management helps administrators create various capacity profiles and associate users with matching profiles. You can assign multiple capacity profiles to users.
- The administrator can block the assignment of extra work to the agents when they're working on certain channels, such as phone calls.
- The supervisor can override the agent's configured capacity and assign work to user manually.
- In the assignment rule, you can create a rule to find an agent whose capacity profile matches that of the work item.
- We recommend that you configure either capacity profiles or capacity units in your organization, but not both.
- The capacity isn't considered when an agent takes part in consult or monitors a conversation.

You might find it helpful to configure profile-based capacity in the following scenarios:

- Your agents vary in experience and skill set.
- Agents need an upper limit on the amount of work assigned to them.
- Work items are of different complexity and assigned from different channels.
- Assignment in one channel impacts the assignments of another channel. For example, you can't assign another work to agents who are on phone calls.

ⓘ Important

This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making—and should not be used to make—decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and,

as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

Create a capacity profile and assign to users

Create a capacity profile, and use it in a workstream for routing work items.

For a capacity profile, you can add or remove users and edit any setting except reset frequency. If you no longer require the profile, you can delete it.

1. Go to one of the admin apps, and perform the following steps.

   Customer Service admin center

   - In the site map, select **User management** in **Customer support**. The **User management** page appears.

2. Select the **Manage** option for **Capacity profile**.

3. On the **Capacity profiles** page, select **Create new**.

4. On the **Details** tab of the **Create capacity profile** dialog box, enter the following details:

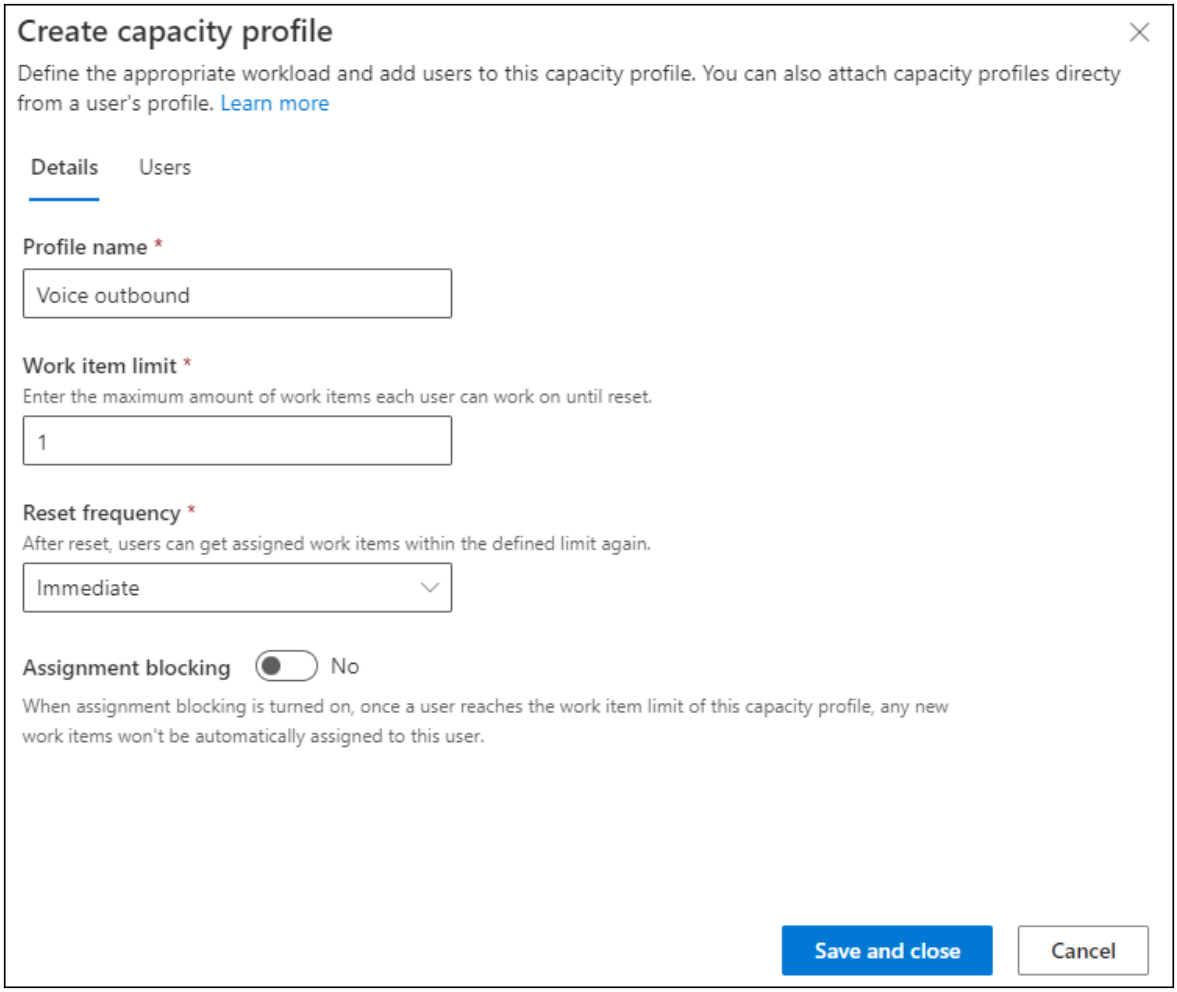
   - **Profile name**: Name for the capacity profile.

   - **Work item limit**: Number of units of the work type that you can assign to the agent.

   - **Reset frequency**: Period after which capacity consumption is reset for agents. Select one of the following options:
     - **Immediate**: Capacity is reset immediately.
     - **End of day**: Capacity is reset after the agent's shift ends even if all the assigned conversations aren't closed by the agent. The open conversations aren't counted in the work item limit and the agent is assigned new work items in their next shift.

     Once configured, you'll have to recreate the capacity profile if you want to change the reset frequency.

- **Assignment blocking**: Set the toggle to **Yes**. When the work item limit is met, the agent isn't assigned a new work item automatically.



5. On the **Users** tab, select **Add user**, and in the **Users** list, select the users. Alternatively, use the **Search** option to search for and add the user.

> **Important**
>
> Users must be configured as a bookable resource to be assigned the capacity profile. More information: **Manage users**.

6. Select **Add user**. The capacity profile is assigned to the user.

Configure agent-specific work limits in capacity profiles

Agents in your contact center might need different work item limits. You can allocate these limits to agents through capacity profiles.

For selective agents, you can define a work item limit that's different from the default limit by using the custom limit option in the capacity profiles.

To set the custom limits, do the following steps:

1. In Customer Service admin center, select **User management** under **Customer support**, and on the page that appears, select **Manage** for **Enhanced user management**.
2. In **Contact center users**, select the agents for whom you want to allocate a custom limit, and then select **Update user attributes** > **Update capacity profiles**.
3. On the **Update Capacity profiles** pane, in **Capacity profiles**, select a profile, and in **Custom limit**, enter a value according to your business need.
4. Select **Add to all**. The capacity profile with the custom limit is added to the users in the list.
5. Repeat the step 3 to update more profiles if you need to.
6. Save and close. The custom limit is denoted with an arrows icon to help visually differentiate among users with default and custom limits.
7. Inform the affected agents to refresh their browser to update their presence. The system assigns the work items based on the agents updated capacity and presence.
8. To reset the custom limit, set the custom limit field to empty and save the changes.

The configuration updates can take up to 15 minutes to sync.

You can customize the Agents report in the Omnichannel real-time analytics dashboard to see the custom limits.

How agent-specific limits work

Typically, the work assignment takes place according to the individual agent's default work item limit in the capacity profiles.

However, if you configure custom limits through capacity profiles, then agents receive work items according to the custom limit. More details are as follows:

- The custom limit might be lower or higher than the default limit and remains applicable for the selected agents until you manually reset it to the default limit.
- The system applies the custom limit to new work assignments only. If the custom limit is lower than the used limit, the system doesn't reassign the currently assigned work items for the agents.

- The other agents with the same capacity profile for whom the custom limit isn't configured have the default limit. Any changes in the default limit will affect these agents. However, the agents with custom limit will remain unaffected.

An example of the custom limit is as follows:

Ana, an agent at Contoso Coffee, is an expert in handling Return queries for Café A 100 machine. Henry, who has joined Contoso recently, is learning the nuances of Café A 100 machine. Eugene, the admin at Contoso has configured a capacity profile for “Return orders” with a default limit of two conversations per day. Eugene assigns the “Return orders” profile with the default limit to Henry. Eugene allocates a custom limit of five to Ana in the “Return orders” profile. Ana will receive maximum of five conversations per day from the “Return orders” profile while Henry will receive a maximum of two conversations only in a day for the same profile.

Update work limits using OData

Alternatively, you can use an OData call to update the custom limits by specifying a value for the msdyn_maxunits field in the msdyn_bookableresourcecapacityprofile entity. To reset the custom limit, specify the value as null for the msdyn_maxunits field.

A sample code block to update the custom limit as 5 is as follows.

```
var data = {msdyn_maxunits: 5} // the value denotes the custom limit
 Xrm.WebApi.updateRecord("msdyn_bookableresourcecapacityprofile", "<Bookable
Resource Capacity Profile ID>", data).then (
    function success(result) {
        console.log("Differentiated units updated");
    },
    function (error) {
        console.log(error.message);
        // handle error conditions
    }
);
```

Set capacity profiles for workstreams

After you create the capacity profiles, configure the following settings to assign work items to agents at runtime:

- Set the capacity profile in the work distribution settings. The system applies the profile to all the work items routed through the workstream. More information:

Configure work distribution

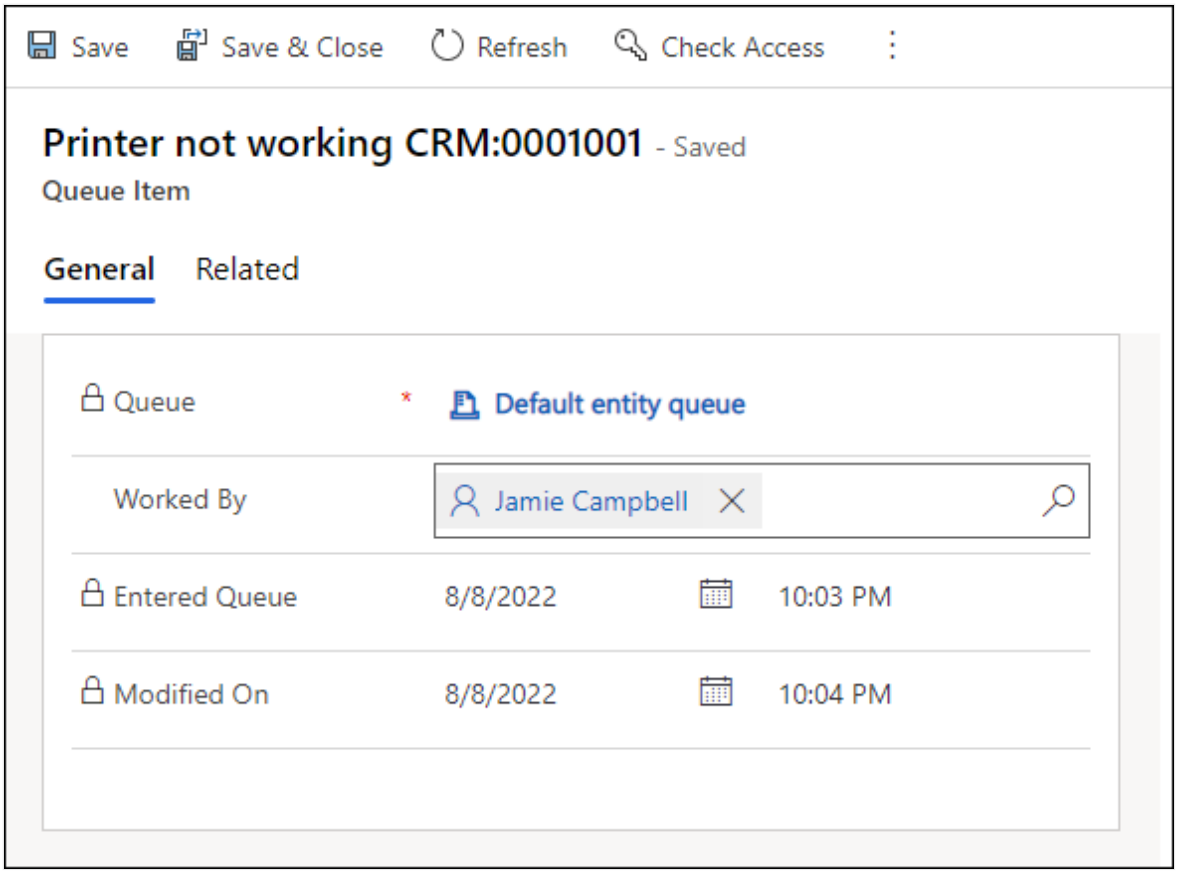
- Set the capacity profile in a classification ruleset for the workstream as a rule output. Append the new capacity profile to the work item. During assignment, unified routing will look for an agent who has available capacity in both the profiles, the default profile from the workstream and the appended profile from the classification. More information: Create classification rulesets based on capacity profiles

You need not define assignment rules specific to capacity profiles at queue level to find agents with matching capacity profiles. If capacity profile is attached to a work item, then the system will ensure that the assigned agent has the matching capacity profile.

Release capacity for agents

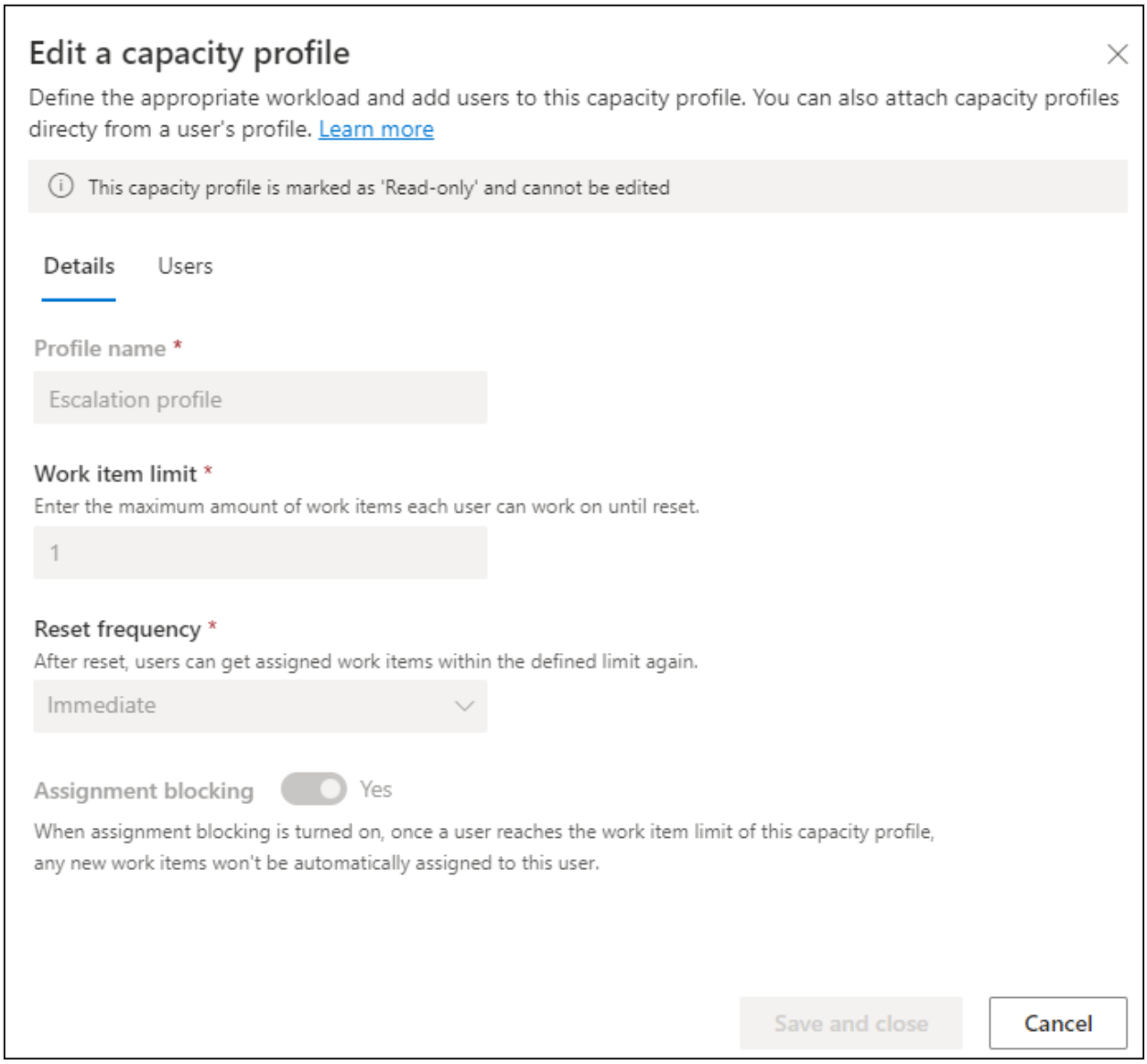
For the system to efficiently manage agent workload, you must automatically release the agent capacity when agents complete their assigned work items. Based on system settings, the agent capacity is released in the following manner:

- **Conversation**: When the agents end the conversation and close their session.
- **Case**: When the agent resolves the case. Capacity is also released automatically when agent cancels the case or removes their assignment by clearing their name from the **Worked By** field on the **Queue Item details** dialog.
- **All records and activities**: Capacity isn't released automatically for activities, such as email, that's configured for record routing. To release the agent capacity, do one of the following steps:
  - Deactivate the assigned queue item; the associated work item is closed.
  - If you need to keep the record open, go to the queue item dialog and remove the agent name from the **Worked By** field. The automatic assignment will try to reassign the item to an agent in the queue.



Escalation profiles

The escalation profile is used when a chat conversation is escalated to a voice or video call. This profile is available out of the box and can't be edited. When an agent escalates a chat to a voice or video call, a new session starts and an escalation profile is attached to the work item, so that the agent doesn’t receive a new chat or voice call until the current call with the customer is over. If the agent transfers the video or voice call to another agent, the escalation profile becomes applicable to the new agent.



How to set multiple capacity profiles in a single workstream

Let us take a scenario where you want to route cases as follows:

- Agents can work on maximum two high priority cases per day.
- Agents can work on maximum four cases of normal priority.
- But the agent should never be assigned more than five cases per day of high priority and normal priority.

1. Create the following profiles:

    - **High-priority profile**: Two cases per day, reset at the end of day
    - **Normal-priority profile**: Four cases per day, reset at the end of day
    - **Total-capacity profile**: Five cases per day, reset at the end of day

2. In the workstream, set the "Total-capacity profile" as the default profile.

3. Use the classification rules to set the capacity profiles for the work items as "High-priority profile" or "Normal-priority profile" according to the priority of the case.
4. Ensure that the agents have all the three profiles.

Runtime behavior of multiple capacity profiles in a single workstream

When a work item is labeled with multiple capacity profiles, the assignment strategy considers the agent who matches all the required capacity profiles.

1. When the high priority work item comes, it's labeled with "Total-capacity profile" and "High-priority profile".
2. An agent who has capacity in both these profiles only is selected. When the work item is assigned, capacity is consumed from both the profiles.
3. Similarly, for normal priority cases, the capacity is consumed from both "Total-capacity profile" and "Normal-priority profile".

See also

Create workstreams
Manage users in Omnichannel for Customer Service
Map role personas
Manage historical data of capacity updates for agents

Create and manage capacity profiles

Article • 10/23/2023

You can create capacity profiles and assign them to agents to define the types and amount of work they can take. Capacity profiles contain information, such as the amount of work, concurrent or daily capacity, and whether other channels are affected.

- Capacity management helps administrators create various capacity profiles and associate users with matching profiles. You can assign multiple capacity profiles to users.
- The administrator can block the assignment of extra work to the agents when they're working on certain channels, such as phone calls.
- The supervisor can override the agent's configured capacity and assign work to user manually.
- In the assignment rule, you can create a rule to find an agent whose capacity profile matches that of the work item.
- We recommend that you configure either capacity profiles or capacity units in your organization, but not both.
- The capacity isn't considered when an agent takes part in consult or monitors a conversation.

You might find it helpful to configure profile-based capacity in the following scenarios:

- Your agents vary in experience and skill set.
- Agents need an upper limit on the amount of work assigned to them.
- Work items are of different complexity and assigned from different channels.
- Assignment in one channel impacts the assignments of another channel. For example, you can't assign another work to agents who are on phone calls.

ⓘ Important

This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making—and should not be used to make—decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and,

as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

Create a capacity profile and assign to users

Create a capacity profile, and use it in a workstream for routing work items.

For a capacity profile, you can add or remove users and edit any setting except reset frequency. If you no longer require the profile, you can delete it.

1. Go to one of the admin apps, and perform the following steps.

   Customer Service admin center

   - In the site map, select **User management** in **Customer support**. The **User management** page appears.

2. Select the **Manage** option for **Capacity profile**.

3. On the **Capacity profiles** page, select **Create new**.

4. On the **Details** tab of the **Create capacity profile** dialog box, enter the following details:

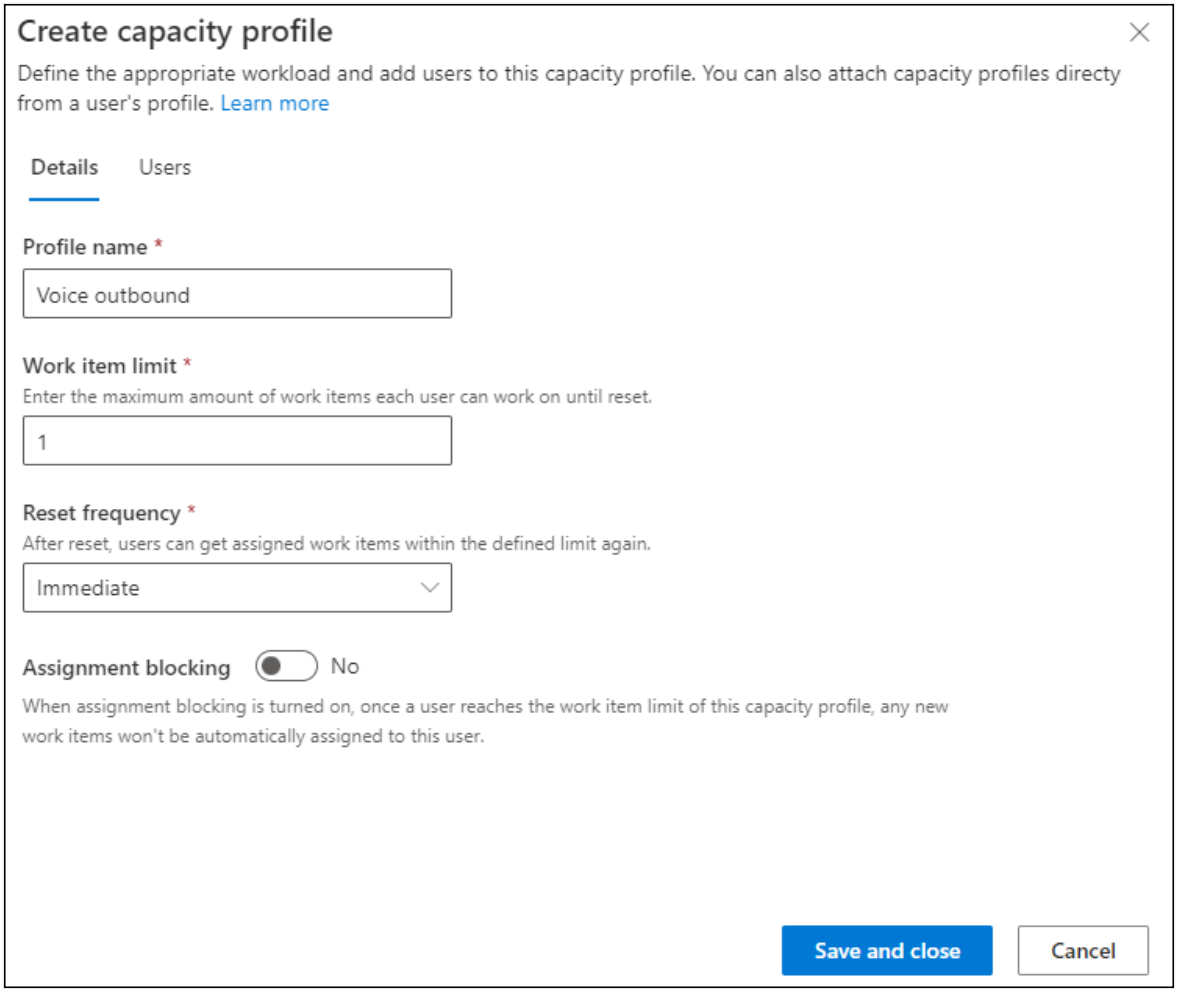
   - **Profile name**: Name for the capacity profile.

   - **Work item limit**: Number of units of the work type that you can assign to the agent.

   - **Reset frequency**: Period after which capacity consumption is reset for agents. Select one of the following options:
     - **Immediate**: Capacity is reset immediately.
     - **End of day**: Capacity is reset after the agent's shift ends even if all the assigned conversations aren't closed by the agent. The open conversations aren't counted in the work item limit and the agent is assigned new work items in their next shift.

     Once configured, you'll have to recreate the capacity profile if you want to change the reset frequency.

- **Assignment blocking**: Set the toggle to **Yes**. When the work item limit is met, the agent isn't assigned a new work item automatically.



5. On the **Users** tab, select **Add user**, and in the **Users** list, select the users. Alternatively, use the **Search** option to search for and add the user.

> **Important**
>
> Users must be configured as a bookable resource to be assigned the capacity profile. More information: **Manage users**.

6. Select **Add user**. The capacity profile is assigned to the user.

Configure agent-specific work limits in capacity profiles

Agents in your contact center might need different work item limits. You can allocate these limits to agents through capacity profiles.

For selective agents, you can define a work item limit that's different from the default limit by using the custom limit option in the capacity profiles.

To set the custom limits, do the following steps:

1. In Customer Service admin center, select **User management** under **Customer support**, and on the page that appears, select **Manage** for **Enhanced user management**.
2. In **Contact center users**, select the agents for whom you want to allocate a custom limit, and then select **Update user attributes** > **Update capacity profiles**.
3. On the **Update Capacity profiles** pane, in **Capacity profiles**, select a profile, and in **Custom limit**, enter a value according to your business need.
4. Select **Add to all**. The capacity profile with the custom limit is added to the users in the list.
5. Repeat the step 3 to update more profiles if you need to.
6. Save and close. The custom limit is denoted with an arrows icon to help visually differentiate among users with default and custom limits.
7. Inform the affected agents to refresh their browser to update their presence. The system assigns the work items based on the agents updated capacity and presence.
8. To reset the custom limit, set the custom limit field to empty and save the changes.

The configuration updates can take up to 15 minutes to sync.

You can customize the Agents report in the Omnichannel real-time analytics dashboard to see the custom limits.

How agent-specific limits work

Typically, the work assignment takes place according to the individual agent's default work item limit in the capacity profiles.

However, if you configure custom limits through capacity profiles, then agents receive work items according to the custom limit. More details are as follows:

- The custom limit might be lower or higher than the default limit and remains applicable for the selected agents until you manually reset it to the default limit.
- The system applies the custom limit to new work assignments only. If the custom limit is lower than the used limit, the system doesn't reassign the currently assigned work items for the agents.

- The other agents with the same capacity profile for whom the custom limit isn't configured have the default limit. Any changes in the default limit will affect these agents. However, the agents with custom limit will remain unaffected.

An example of the custom limit is as follows:

Ana, an agent at Contoso Coffee, is an expert in handling Return queries for Café A 100 machine. Henry, who has joined Contoso recently, is learning the nuances of Café A 100 machine. Eugene, the admin at Contoso has configured a capacity profile for “Return orders” with a default limit of two conversations per day. Eugene assigns the “Return orders” profile with the default limit to Henry. Eugene allocates a custom limit of five to Ana in the “Return orders” profile. Ana will receive maximum of five conversations per day from the “Return orders” profile while Henry will receive a maximum of two conversations only in a day for the same profile.

Update work limits using OData

Alternatively, you can use an OData call to update the custom limits by specifying a value for the msdyn_maxunits field in the msdyn_bookableresourcecapacityprofile entity. To reset the custom limit, specify the value as null for the msdyn_maxunits field.

A sample code block to update the custom limit as 5 is as follows.

```
var data = {msdyn_maxunits: 5} // the value denotes the custom limit
 Xrm.WebApi.updateRecord("msdyn_bookableresourcecapacityprofile", "<Bookable
Resource Capacity Profile ID>", data).then (
    function success(result) {
        console.log("Differentiated units updated");
    },
    function (error) {
        console.log(error.message);
        // handle error conditions
    }
);
```

Set capacity profiles for workstreams

After you create the capacity profiles, configure the following settings to assign work items to agents at runtime:

- Set the capacity profile in the work distribution settings. The system applies the profile to all the work items routed through the workstream. More information:

Configure work distribution

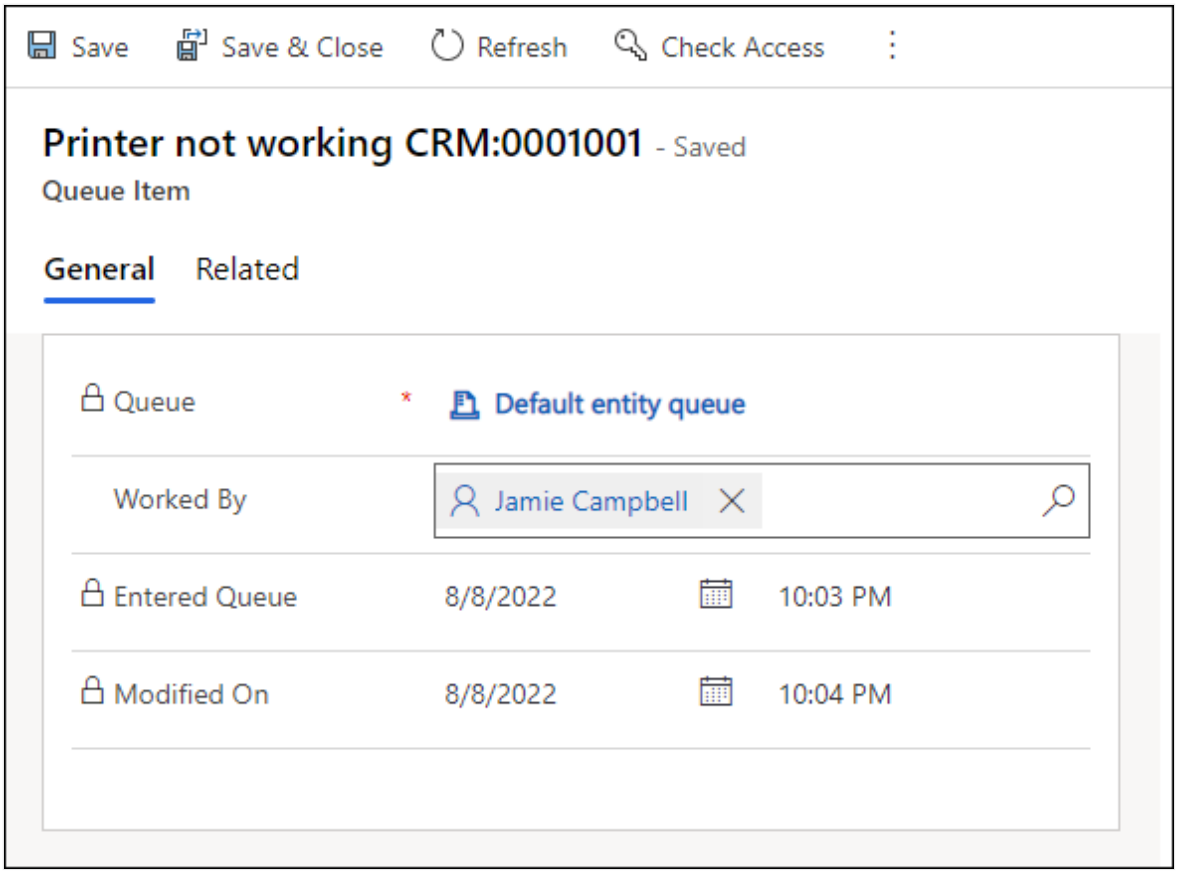
- Set the capacity profile in a classification ruleset for the workstream as a rule output. Append the new capacity profile to the work item. During assignment, unified routing will look for an agent who has available capacity in both the profiles, the default profile from the workstream and the appended profile from the classification. More information: Create classification rulesets based on capacity profiles

You need not define assignment rules specific to capacity profiles at queue level to find agents with matching capacity profiles. If capacity profile is attached to a work item, then the system will ensure that the assigned agent has the matching capacity profile.

Release capacity for agents

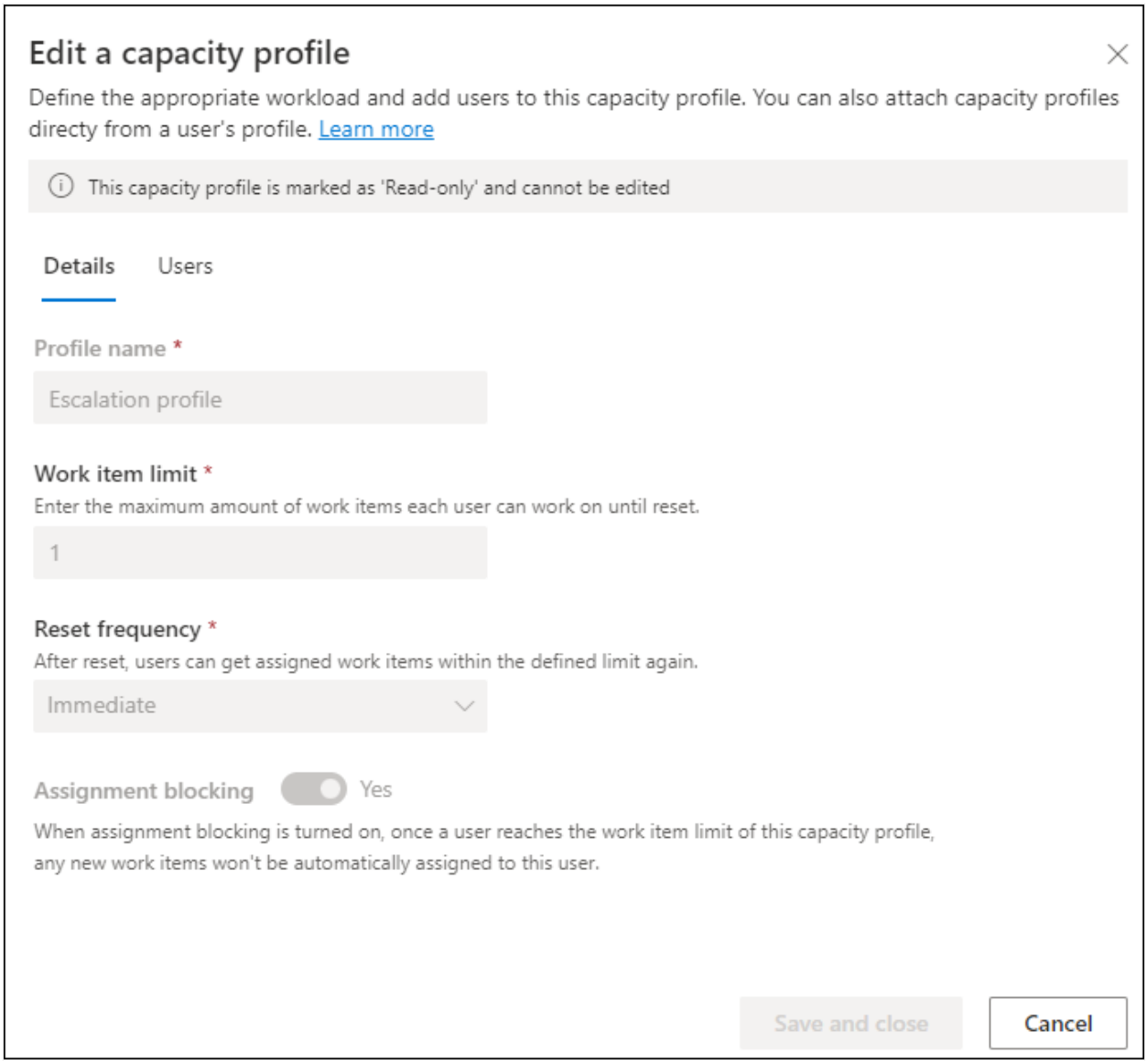
For the system to efficiently manage agent workload, you must automatically release the agent capacity when agents complete their assigned work items. Based on system settings, the agent capacity is released in the following manner:

- **Conversation**: When the agents end the conversation and close their session.
- **Case**: When the agent resolves the case. Capacity is also released automatically when agent cancels the case or removes their assignment by clearing their name from the **Worked By** field on the **Queue Item details** dialog.
- **All records and activities**: Capacity isn't released automatically for activities, such as email, that's configured for record routing. To release the agent capacity, do one of the following steps:
  - Deactivate the assigned queue item; the associated work item is closed.
  - If you need to keep the record open, go to the queue item dialog and remove the agent name from the **Worked By** field. The automatic assignment will try to reassign the item to an agent in the queue.



Escalation profiles

The escalation profile is used when a chat conversation is escalated to a voice or video call. This profile is available out of the box and can't be edited. When an agent escalates a chat to a voice or video call, a new session starts and an escalation profile is attached to the work item, so that the agent doesn’t receive a new chat or voice call until the current call with the customer is over. If the agent transfers the video or voice call to another agent, the escalation profile becomes applicable to the new agent.



How to set multiple capacity profiles in a single workstream

Let us take a scenario where you want to route cases as follows:

- Agents can work on maximum two high priority cases per day.
- Agents can work on maximum four cases of normal priority.
- But the agent should never be assigned more than five cases per day of high priority and normal priority.

1. Create the following profiles:

    - **High-priority profile**: Two cases per day, reset at the end of day
    - **Normal-priority profile**: Four cases per day, reset at the end of day
    - **Total-capacity profile**: Five cases per day, reset at the end of day

2. In the workstream, set the "Total-capacity profile" as the default profile.

3. Use the classification rules to set the capacity profiles for the work items as "High-priority profile" or "Normal-priority profile" according to the priority of the case.
4. Ensure that the agents have all the three profiles.

Runtime behavior of multiple capacity profiles in a single workstream

When a work item is labeled with multiple capacity profiles, the assignment strategy considers the agent who matches all the required capacity profiles.

1. When the high priority work item comes, it's labeled with "Total-capacity profile" and "High-priority profile".
2. An agent who has capacity in both these profiles only is selected. When the work item is assigned, capacity is consumed from both the profiles.
3. Similarly, for normal priority cases, the capacity is consumed from both "Total-capacity profile" and "Normal-priority profile".

See also

Create workstreams
Manage users in Omnichannel for Customer Service
Map role personas
Manage historical data of capacity updates for agents

Delete historical data of agent capacity updates

Article • 03/17/2023

The history of updates to your agents' capacity profiles is stored in Dataverse for Apps. To help you use your storage capacity efficiently, we recommend that you periodically delete the historical data.

Review your storage consumption. If the storage consumed is 50%–60% of the total capacity, consider moving the data to a different data store if you want to keep it. Otherwise, delete it.

> **⊗ Caution**
>
> Deleted data can't be recovered. We recommend that you verify the data isn't required before you delete it.

See also

Manage capacity profiles

Manage personas and custom security roles in Customer Service

Article • 04/04/2022

Introduction

You can map security roles to personas to define user permissions for unified routing. Persona mapping gives your organization the option to add custom security roles alongside existing security roles in Customer Service and Omnichannel for Customer Service. The admin, supervisor, and agent personas are user archetypes that security roles can be mapped to. By mapping custom security roles to these personas, you can fine-tune data access and security across users and business units.

You can create and assign custom security roles in the Microsoft Dynamics 365 admin center. Persona mapping can be found in the Omnichannel admin center or Customer Service Hub in the **User attributes** section. For the custom security roles to be functional, perform the following steps:

1. Create custom security roles.
2. Map roles to personas.
3. Enable access to applications.
4. Enable access to forms and dashboards.

Personas for unified routing

Admin

The admin persona can set up end-to-end workflows to handle customer interactions using unified routing and can perform the following tasks:

- Create and manage classification and assignment rules for work items based on business rules.
- Create and maintain capacity profiles and schedules based on office hours.
- Configure basic and advanced routing for all work items.
- Create and maintain agent skills for efficient skill-based routing of work items.
- Manage users and their permissions by mapping the roles to the appropriate personas.
- Configure and maintain custom presence.

- Create and maintain targeted app experiences for agents and supervisors through app profiles, session templates, and notification templates.
- Enable diagnostics and insights on assignment flow.

Supervisor

The supervisor persona can manage agents and their work items through routing rules. The supervisor can perform the following tasks:

- Assign or reassign current work items to agents depending on the agent availability and service-level agreement (SLA) of the work item.
- Manage permissions on the data available to agents as part of the interactions (Record-level data permissions).
- Monitor agent interactions and provide help as required.
- Access insights related to agent performance and customer interactions.
- Access diagnostics for the routed records.

Agent

The agent persona can manage the work items that're assigned to them through custom or default rules set up by the admin persona. The agent can perform the following tasks:

- Manage their work items as follows:
  - Engage with the customers.
  - Reassign work to other agents in the group.
  - Decline interactions.
- Manage their skills.
- Manage their case queues.

Create custom security roles

Custom security roles can be created at an organizational or business unit level, and you can edit access level for records and tasks. The addition of custom security roles is optional. To ensure persona mapping works, perform the following steps:

1. Identify the tasks that a user will perform.

2. Create a copy of an existing role as your starting point. Custom security roles must have correct minimum access levels for the appropriate records to ensure feature functionality. You can copy one of the following predefined security roles:

- Omnichannel Administrator
- Omnichannel supervisor
- Omnichannel agent
- CSR Manager
- Customer Service Representative

3. Customize permissions and access levels for your new security role.
4. Save the security role with a name that will help you identify it during persona mapping.

For example, if your organization is expecting a large seasonal increase in chat service requests, you might hire some seasonal employees to exclusively handle chat channels. You can create a security role for the "seasonal service rep". First, you'd identify that users with this role are part of the agent archetype. Knowing that, you'll create a copy of the "Omnichannel agent" security role. By starting with a copied role, you are less likely to face user issues by under-granting privileges. As part of customizing, you might remove read access for records that're not related to chat, such as Survey feedback, SMS, or voice channels. Finally, you can save the new security role as "seasonal service rep".

Map roles to personas

After persona mapping is enabled, it'll automatically assign default roles depending on the Dynamics 365 services that're enabled for your environment. For an environment with Customer Service Enterprise license, the default mapping includes Customer Service Representative and CSR manager roles. For an environment with Omnichannel for Customer Service, the three primary security roles are mapped to personas. If both services are enabled, both sets of default mappings are included. The following table contains the mapping information for the roles in Customer Service and Omnichannel for Customer Service.

Service	**Admin persona default mapping**	**Supervisor persona default mapping**	**Agent persona default mapping**
Customer Service Enterprise	CSR Manager	CSR Manager	Customer Service Representative
Omnichannel for Customer Service	Omnichannel Administrator	Omnichannel supervisor	Omnichannel agent

Service	Admin persona default mapping	Supervisor persona default mapping	Agent persona default mapping
Customer Service Enterprise + Omnichannel for Customer Service	CSR Manager + Omnichannel Administrator	CSR Manager + Omnichannel supervisor	Customer Service Representative + Omnichannel agent

> **Note**
>
> - Customized mappings won't be reset if one of the services is added later.
> - Make sure that the roles you want to map to personas have been assigned to the users directly and not through team memberships.

Manage personas

You can customize the roles to persona mapping in the Customer Service admin center, Omnichannel admin center, or Customer Service Hub app.

To customize the role to persona mapping

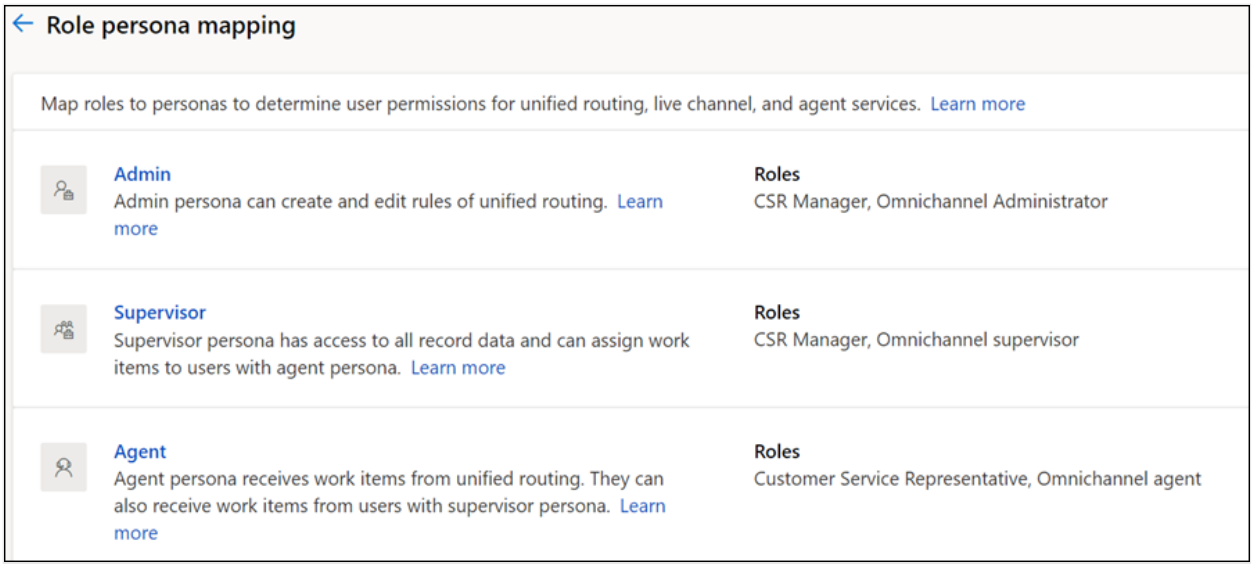
1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, select **User management** in **Customer support**. The **User management** page appears.

2. Select **Manage** for **Role persona mapping**.
3. Select the persona to add or remove security roles. The **Edit roles** pane displays the list of roles.
4. Select or clear the selection from the checkboxes for the required security roles.
5. Select **Save and Close**.

The updated set of roles are listed for the persona.



To assign a persona to the "seasonal service rep" role mentioned in the example, select the **Agent** persona. In the **Edit roles** pane, locate the "seasonal service rep" security role and select the checkbox. After you select **Save and Close**, the custom security role will be listed under the agent persona. With role to persona mapping completed, you can now grant access to any applications and forms they would use.

Enable access to applications

Users with security roles mapped to personas do not get automatic access to associated dashboards or applications. Access needs to be provided by administrators.

Perform the following steps to ensure that access and privileges are provided to users.

1. Create the required user role. More information: Create users and assign security roles
2. Add and edit user permissions and privileges as required.
3. Sign in to Dynamics 365.
4. Select the ellipsis in the application tile.
5. Select **Manage roles**.
6. In the dialog that appears, select the custom role that you want to grant permission to and select **Save**.

Enable access to forms and dashboards

To enable access to a form or dashboard, perform the following steps:

1. Sign in to Dynamics 365.
2. Go to **Advanced Settings** > **Settings**.
3. Select **Customizations** in **Customize the system**.
4. From the **Solution Default Solution** list, select **Entities** > **Characteristics**, and then **Forms**.
5. Open an active form, and select **Enable security roles**.
6. Select the role that you want to provide access to, and select **OK**.

See also

Overview of unified routing
Manage users for unified routing
Personas and privileges

Personas and privileges

Article • 05/31/2023

This topic lists the table privileges and recommended access levels for the administrator, supervisor, and agent personas in Customer Service and Omnichannel for Customer Service.

To know more about the various access levels, see Security roles.

For more information about how personas are mapped to roles, see Manage personas.

> **Note**
>
> If custom plug-ins and workflows are used in the system, then you must ensure that the required privileges are granted to the personas, otherwise your plug-ins won't work.

Persona: Administrator

The following table lists the privileges and recommended access levels for the admin persona.

Table name	Table unique name	Privilege name	Recommended access level
Activity	Activity	Append, Append To, Delete, Update	Local
		Assign	Deep
		Create	Basic
		Read, Share	Global
AdminAppState	msdyn_adminappstate	Append, Append To, Create, Delete, Read, Update	Global
Agent Status history	msdyn_agentstatushistory	Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
AI Configuration	msdyn_aiconfiguration	Append, Append To, Create, Delete, Read, Update	Global
AI Model	msdyn_aimodel	Append, Append To, Create, Delete, Read, Update	Global
AI Template	msdyn_aitemplate	Read	Global
App Module	AppModule	Read, Update	Global
App Profile	msdyn_appconfiguration	Append, Append To, Create, Delete, Read, Update	Global
App Configuration	AppConfig	Read	Global
App Parameter Definition (Deprecated)	msdyn_consoleappparameterdefinition	Append, Append To, Create, Delete, Read, Update	Global
Application Extension	msdyn_applicationextension	Append, Append To, Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Application Tab Template	msdyn_applicationtabtemplate	Append, Append To, Create, Delete, Read, Update	Global
Application Tab Template (Deprecated)	msdyn_consoleapplicationtemplate	Append, Append To, Create, Delete, Read, Update	Global
Application Type (Deprecated)	msdyn_consoleapplicationtype	Append, Append To, Create, Delete, Read, Update	Global
Assignment Configuration	msdyn_assignmentconfiguration	Append, Append To, Create, Delete, Read, Update	Global
Assignment Configuration Step	msdyn_assignmentconfigurationstep	Append, Append To, Create, Delete, Read, Update	Global
Audio File	msdyn_soundfile	Append, Append To, Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Bookable Resource	BookableResource	Append, Append To, Create, Delete, Read, Update	Global
Bookable Resource Capacity Profile	msdyn_bookableresourcecapacityprofile	Append, Append To, Assign, Create, Delete, Read, Share, Update	Global
Bookable Resource Characteristic	BookableResourceCharacteristic	Append, Append To, Create, Delete, Read, Update	Global
Capacity Profile	msdyn_capacityprofile	Append, Append To, Assign, Create, Delete, Read, Share, Update	Global
channel	msdyn_channel	Append, Append To, Create, Delete, Read, Update	Global
Channel Provider	msdyn_channelprovider	Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Channel Configuration	msdyn_occhannelconfiguration	Read, Update	Global
Channel Integration Framework v1.0 Provider	msdyn_ciprovider	Append, Append To, Create, Delete, Read, Update	Global
Channel State Configuration	msdyn_occhannelstateconfiguration	Read	Global
Characteristic	Characteristic	Append, Append To, Create, Delete, Read, Update	Global
Characteristic mapping	msdyn_ocsitdskill	Append, Append To, Create, Delete, Read, Update	Global
Charts	SavedQueryVisualizations	Read	Global
Columns	Attribute	Update	Global
Context item value	msdyn_ocliveworkitemcontextitem	Append, Create, Delete, Read, Update	Global
Context variable	msdyn_ocliveworkstreamcontextvariable	Append, Append To, Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Conversation Capacity profile	msdyn_ocliveworkitemcapacityprofile	Append, Append To, Assign, Create, Delete, Read, Share, Update	Global
Conversation Characteristic	msdyn_ocliveworkitemcharacteristic	Append, Append To, Create, Delete, Read, Update	Global
Conversation Sentiment	msdyn_ocliveworkitemsentiment	Create, Delete, Read, Update	Global
Custom messaging account	msdyn_ocbotchannelregistration	Append, Append To, Create, Delete, Read, Update	Global
Customization	Customization	Publish, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Decision contract	msdyn_decisioncontract	Append, Append To, Assign, Create, Delete, Read, Share, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Decision rule set	msdyn_decisionruleset	Append, Append To, Assign, Create, Delete, Read, Share, Update	Global
Deprecated Workstream Entity Configuration	msdyn_entityconfig	Append, Append To, Create, Delete, Read, Update	Global
Entity	msdyn_entityroutingconfiguration	Append, Append To, Create, Delete, Read, Update	Global
Entity Routing Context	msdyn_cdsentityengagementctx	Create, Delete, Read, Update	Global
Forms	SystemForm	Read	Global
Geo Location Provider	msdyn_oc_geolocationprovider	Append, Append To, Create, Delete, Read, Update	Global
KPI Event Definition	msdyn_kpieventdefinition	Read	Global
Language	msdyn_oclanguage	Read, Append To	Global
Live work item event	msdyn_liveworkitemevent	Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Live Work Item Participant (Deprecated)	msdyn_ocliveworkitemparticipant	Create, Delete, Read, Update	Global
Localization	msdyn_oclocalizationdata	Append, Append To, Create, Delete, Read, Update	Global
Masking Rule	msdyn_maskingrule	Create, Delete, Read, Update	Global
Master Entity Routing Configuration	msdyn_masterentityroutingconfiguration	Create	Local
		Append, Append To, Assign, Read, Share, Update	Global
		Delete	Deep
Message	msdyn_ocsystemmessage	Append, Append To, Create, Delete, Read, Update	Global
Model training details	msdyn_ocsimltraining	Append, Append To, Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Notification Field	msdyn_notificationfield	Append, Append To, Create, Delete, Read, Update	Global
Notification Template	msdyn_notificationtemplate	Append, Append To, Create, Delete, Read, Update	Global
Notification Field (Deprecated)	msdyn_consoleapplicationnotificationfield	Append, Append To, Create, Delete, Read, Update	Global
Notification Template (Deprecated)	msdyn_consoleapplicationnotificationtemplate	Append, Append To, Create, Delete, Read, Update	Global
Omnichannel Queue (deprecated)	msdyn_omnichannelqueue	Append, Append To, Assign, Create, Delete, Read, Update	Global
Omnichannel Configuration	msdyn_omnichannelconfiguration	Append, Append To, Read, Update	Global
Omnichannel Personalization	msdyn_omnichannelpersonalization	Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Ongoing conversation (Deprecated)	msdyn_liveconversation	Append, Append To, Update	Local
		Assign	Deep
		Create	Basic
		Read, Share	Global
Operating Hour	msdyn_operatinghour	Append, Append To, Create, Delete, Read, Update	Global
Pane tool configuration	msdyn_panetoolconfiguration	Read	Global
Parameter (Deprecated)	msdyn_consoleapplicationtemplateparameter	Append, Append To, Create, Delete, Read, Update	Global
Persona Security Role Mapping	msdyn_personasecurityrolemapping	Append, Append To, Create, Delete, Read, Update	Global
Personal quick reply	msdyn_personalmessage	Append, Append To, Create, Delete, Read, Update	Basic

Table name	Table unique name	Privilege name	Recommended access level
Personal sound setting	msdyn_personalsoundsetting	Append, Append To, Create, Delete, Read, Update	Basic
PluginAssembly	PluginAssembly	Read	Global
PluginType	PluginType	Read	Global
Power BI Configuration	msdyn_analytics	Create, Delete, Read, Update	Global
Presence	msdyn_presence	Append, Append To, Create, Delete, Read, Update	Global
Productivity pane configuration	msdyn_paneconfiguration	Read	Global
Provisioning State	msdyn_ocprovisioningstate	Append, Append To, Create, Delete, Read, Update	Global
Publisher	Publisher	Read	Global
Publisher Address	PublisherAddress	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Query	Query	Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Queue	Queue	Append, Append To, Assign, Create, Delete, Read, Update	Global
Quick reply	msdyn_cannedmessage	Append, Append To, Create, Delete, Read, Update	Global
Rating Model	RatingModel	Append, Append To, Create, Delete, Read, Update	Global
Rating Value	RatingValue	Append, Append To, Create, Delete, Read, Update	Global
Recording	msdyn_ocrecording	Append, Append To, Create, Delete, Read, Update	Global
Relationship	Relationship	Update	Global
Role	Role	Append To, Assign, Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Routing configuration	msdyn_routingconfiguration	Append, Append To, Create, Delete, Read, Update	Global
Routing configuration step	msdyn_routingconfigurationstep	Append, Append To, Create, Delete, Read, Update	Global
Rule Item	msdyn_ocruleitem	Append, Append To, Create, Delete, Read, Update	Global
Rulesetentitymapping	msdyn_rulesetdependencymapping	Append, Append To, Assign, Create, Delete, Read, Update	Global
Scenario	msdyn_scenario	Append, Append To, Create, Delete, Read, Update	Global
SdkMessage	SdkMessage	Read	Global
SdkMessageProcessingStep	SdkMessageProcessingStep	Read	Global
SdkMessageProcessingStepImage	SdkMessageProcessingStepImage	Read	Global
Search Configuration	msdyn_searchconfiguration	Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Self service	msdyn_visitorjourney	Read	Global
Sentiment Analysis	msdyn_sentimentanalysis	Read, Update	Global
Service Endpoint	ServiceEndpoint	Read	Global
Session event	msdyn_sessionevent	Create, Delete, Read, Update	Global
Session Template	msdyn_sessiontemplate	Append, Append To, Create, Delete, Read, Update	Global
Session Characteristic	msdyn_ocsessioncharacteristic	Append, Append To, Create, Delete, Read, Update	Global
Session participant	msdyn_sessionparticipant	Create, Delete, Read, Update	Global
Session Templates (Deprecated)	msdyn_consoleapplicationsessiontemplate	Append, Append To, Create, Delete, Read, Update	Global
SharePoint Data	SharePointData	Create, Read, Update	Global
SharePointDocument	SharePointDocument	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Skill finder model	msdyn_ocskillidentmlmodel	Append, Append To, Create, Delete, Read, Update	Global
Solution	Solution	Read, Update	Global
Sound notification setting	msdyn_soundnotificationsetting	Append, Append To, Create, Delete, Read, Update	Global
System User	User	Append, Append To, Create, Read, Update	Global
Table	Entity	Update	Global
Tag	msdyn_octag	Append, Append To, Create, Delete, Read, Update	Global
Template Parameter	msdyn_templateparameter	Append, Append To, Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
Template Tag (Deprecated)	msdyn_templatetags	Append, Append To, Create, Delete, Read, Update	Global
Training data import configuration	msdyn_ocsitdimportconfig	Append, Append To, Create, Delete, Read, Update	Global
Training record	msdyn_ocsitrainingdata	Append, Append To, Create, Delete, Read, Update	Global
Transcript	msdyn_transcript	Append, Append To, Create, Delete, Read, Update	Global
Unified routing diagnostic	msdyn_unifiedroutingdiagnostic	Delete, Read, Update	Global
Unified routing run	msdyn_unifiedroutingrun	Delete, Read	Global
UR notification template	msdyn_urnotificationtemplate	Append, Append To, Create, Delete, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
UR Notification Template Mapping	msdyn_urnotificationtemplatemapping	Append, Append To, Create, Delete, Read, Update	Global
User Setting	msdyusd_usersettings	Append, Append To, Read, Update	Global
User settings	msdyn_usersettin	Append, Append To, Create, Delete, Read, Update	Global
Work stream capacity profile	msdyn_liveworkstreamcapacityprofile	Append, Append To, Assign, Create, Delete, Read, Share, Update	Global
Workstream	msdyn_liveworkstream	Append, Append To, Assign, Create, Delete, Read, Share, Update	Global

Persona: Supervisor

The following table lists the privileges and recommended access levels for the supervisor persona.

Table name (A-O)	Table unique name	Privilege name	Recommended access level

Table name (A-O)	Table unique name	Privilege name	Recommended access level
Activity	Activity	Append, Append To, Delete, Update	Local
		Assign	Deep
		Create	Basic
		Read, Share	Global
Agent Status history	msdyn_agentstatushistory	Read	Global
App Module	AppModule	Read	Global
App Profile	msdyn_appconfiguration	Read	Global
App Parameter Definition (Deprecated)	msdyn_consoleappparameterdefinition	Read	Global
Application Extension	msdyn_applicationextension	Read	Global
Application Tab Template	msdyn_applicationtabtemplate	Read	Global
Application Tab Template (Deprecated)	msdyn_consoleapplicationtemplate	Read	Global
Application Type (Deprecated)	msdyn_consoleapplicationtype	Read	Global
Audio File	msdyn_soundfile	Append, Append To, Create, Delete, Read, Update	Global
Bookable Resource	BookableResource	Read	Global
Bookable Resource Characteristic	BookableResourceCharacteristic	Read	Global
channel	msdyn_channel	Read	Global
Channel Provider	msdyn_channelprovider	Read	Global
Channel Integration Framework v1.0 Provider	msdyn_ciprovider	Read	Global
Characteristic	Characteristic	Read	Global

Table name (A-O)	Table unique name	Privilege name	Recommended access level
Context item value	msdyn_ocliveworkitemcontextitem	Read	Global
		Append, Create, Update	Basic
Context variable	msdyn_ocliveworkstreamcontextvariable	Read	Global
Conversation Characteristic	msdyn_ocliveworkitemcharacteristic	Read	Global
Conversation Sentiment	msdyn_ocliveworkitemsentiment	Read	Global
Custom messaging account	msdyn_ocbotchannelregistration	Read	Global
Deprecated Workstream Entity Configuration	msdyn_entityconfig	Read	Global
Entity	msdyn_entityroutingconfiguration	Read	Global
Entity Routing Context	msdyn_cdsentityengagementctx	Read	Global
Geo Location Provider	msdyn_oc_geolocationprovider	Read	Global
Language	msdyn_oclanguage	Read	Global
Live work item event	msdyn_liveworkitemevent	Read	Global
Live Work Item Participant (Deprecated)	msdyn_ocliveworkitemparticipant	Read	Global
Localization	msdyn_oclocalizationdata	Create, Delete, Read, Update	Global
Masking Rule	msdyn_maskingrule	Read	Global
Master Entity Routing Configuration	msdyn_masterentityroutingconfiguration	Read	Global
Message	msdyn_ocsystemmessage	Create, Delete, Read, Update	Global
Notification Field	msdyn_notificationfield	Read	Global
Notification Template	msdyn_notificationtemplate	Read	Global
Notification Field (Deprecated)	msdyn_consoleapplicationnotificationfield	Read	Global
Notification Template (Deprecated)	msdyn_consoleapplicationnotificationtemplate	Read	Global

Table name (A-O)	Table unique name	Privilege name	Recommended access level
Omnichannel Queue (deprecated)	msdyn_omnichannelqueue	Append, Append To, Read	Global
Omnichannel Configuration	msdyn_omnichannelconfiguration	Read	Global
Omnichannel Personalization	msdyn_omnichannelpersonalization	Create, Delete, Read, Update	Basic
Ongoing conversation (Deprecated)	msdyn_liveconversation	Create	Basic
		Read, Share	Global
		Append, Append To, Update	Local
		Assign	Deep
Operating Hour	msdyn_operatinghour	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Parameter (Deprecated)	msdyn_consoleapplicationtemplateparameter	Read	Global
Persona Security Role Mapping	msdyn_personasecurityrolemapping	Read	Global
Personal quick reply	msdyn_personalmessage	Append, Append To, Create, Delete, Read, Update	Basic
Personal sound setting	msdyn_Personalsoundsetting	Append, Append To, Create, Delete, Read, Update	Basic
PluginAssembly	PluginAssembly	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
PluginType	PluginType	Read	Global
Power BI Configuration	msdyn_analytics	Read	Global
Presence	msdyn_presence	Append, Append To, Read	Global
Provisioning State	msdyn_ocprovisioningstate	Read	Global
Queue	Queue	Append, Append To, Read	Global
Quick reply	msdyn_cannedmessage	Create, Delete, Read, Update	Global
Rating Model	RatingModel	Read	Global
Rating Value	RatingValue	Read	Global
Recording	msdyn_ocrecording	Read	Global
Role	Role	Read	Global
Rule Item	msdyn_ocruleitem	Read	Global
Scenario	msdyn_scenario	Read	Global
SdkMessage	SdkMessage	Read	Global
SdkMessageProcessingStep	SdkMessageProcessingStep	Read	Global
SdkMessageProcessingStepImage	SdkMessageProcessingStepImage	Read	Global
Search Configuration	msdyn_searchconfiguration	Read	Global
Self service	msdyn_visitorjourney	Read	Global
Sentiment Analysis	msdyn_sentimentanalysis	Read	Global
Service Endpoint	ServiceEndpoint	Read	Global
Session event	msdyn_sessionevent	Read	Global
Session Template	msdyn_sessiontemplate	Read	Global
Session Characteristic	msdyn_ocsessioncharacteristic	Read	Global
Session participant	msdyn_sessionparticipant	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Session Templates (Deprecated)	msdyn_consoleapplicationsessiontemplate	Read	Global
SharePoint Data	SharePointData	Create, Read, Update	Global
SharePointDocument	SharePointDocument	Read	Global
Solution	Solution	Read	Global
Sound notification setting	msdyn_soundnotificationsetting	Append, Append To, Create, Delete, Read, Update	Global
System User	User	Append, Append To, Create, Read, Update	Local
Tag	msdyn_octag	Append, Append To, Create, Delete, Read, Update	Global
Template Parameter	msdyn_templateparameter	Read	Global
Template Tag (Deprecated)	msdyn_templatetags	Read	Global
Transcript	msdyn_transcript	Read	Global
UR notification template	msdyn_urnotificationtemplate	Read	Global
UR Notification Template Mapping	msdyn_urnotificationtemplatemapping	Read	Global
User Setting	msdyusd_usersettings	Append, Append To, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
User settings	msdyn_usersetting	Append, Append To, Create, Delete, Read, Update	Global
Workstream	msdyn_liveworkstream	Read	Global

Persona: Agent

The following table lists the privileges and recommended access levels for the agent persona.

Table name	Table unique name	Privilege name	Recommended access level
Activity	Activity	Append, Append To, Delete, Update	Local
		Assign	Deep
		Create	Basic
		Read, Share	Global
Agent Status history	msdyn_agentstatushistory	Read	Global
App Module	AppModule	Read	Global
App Profile	msdyn_appconfiguration	Read	Global
App Parameter Definition (Deprecated)	msdyn_consoleappparameterdefinition	Read	Global
Application Extension	msdyn_applicationextension	Read	Global
Application Tab Template	msdyn_applicationtabtemplate	Read	Global
Application Tab Template (Deprecated)	msdyn_consoleapplicationtemplate	Read	Global
Application Type (Deprecated)	msdyn_consoleapplicationtype	Read	Global
Assignment Configuration	msdyn_assignmentconfiguration	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Assignment Configuration Step	msdyn_assignmentconfigurationstep	Read	Global
Audio File	msdyn_soundfile	Append, Append To, Read	Global
Bookable Resource	BookableResource	Read	Global
Bookable Resource Capacity Profile	msdyn_bookableresourcecapacityprofile	Read	Local
Bookable Resource Characteristic	BookableResourceCharacteristic	Read	Global
Capacity Profile	msdyn_capacityprofile	Read	Basic
channel	msdyn_channel	Read	Global
Channel Provider	msdyn_channelprovider	Read	Global
Channel Integration Framework v1.0 Provider	msdyn_ciprovider	Read	Global
Characteristic	Characteristic	Read	Global
Characteristic mapping	msdyn_ocsitdskill	Read	Global
Context item value	msdyn_ocliveworkitemcontextitem	Read	Global
		Append, Create, Update	Basic
Context variable	msdyn_ocliveworkstreamcontextvariable	Read	Global
Conversation Capacity profile	msdyn_ocliveworkitemcapacityprofile	Read	Local
Conversation Characteristic	msdyn_ocliveworkitemcharacteristic	Read	Global
Conversation Sentiment	msdyn_ocliveworkitemsentiment	Read	Global
Custom messaging account	msdyn_ocbotchannelregistration	Read	Global
Decision contract	msdyn_decisioncontract	Append, Append To, Read	Global
		Assign, Share	Basic

Table name	Table unique name	Privilege name	Recommended access level
Decision rule set	msdyn_decisionruleset	Append, Append To, Read	Global
		Assign, Share	Basic
Deprecated Workstream < Entity Configuration	msdyn_entityconfig	Read	Global
Entity	msdyn_entityroutingconfiguration	Read	Global
Entity Routing Context	msdyn_cdsentityengagementctx	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
KPI Event Definition	msdyn_kpieventdefinition	Read	Global
Language	msdyn_oclanguage	Read	Global
Live work item event	msdyn_liveworkitemevent	Read	Global
Live Work Item Participant (Deprecated)	msdyn_ocliveworkitemparticipant	Read	Global
Localization	msdyn_oclocalizationdata	Read	Global
Masking Rule	msdyn_maskingrule	Read	Global
Master Entity Routing Configuration	msdyn_masterentityroutingconfiguration	Append, Append To, Read	Global
		Assign, Share	Basic
Message	msdyn_ocsystemmessage	Read	Global
Model training details	msdyn_ocsimltraining	Read	Global
Notification Field	msdyn_notificationfield	Read	Global
Notification Template	msdyn_notificationtemplate	Read	Global
Notification Field (Deprecated)	msdyn_consoleapplicationnotificationfield	Read	Global
Notification Template (Deprecated)	msdyn_consoleapplicationnotificationtemplate	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Omnichannel Queue (deprecated)	msdyn_omnichannelqueue	Read	Global
Omnichannel Configuration	msdyn_omnichannelconfiguration	Read	Global
Omnichannel Personalization	msdyn_omnichannelpersonalization	Create, Delete, Read, Update	Basic
Ongoing conversation (Deprecated)	msdyn_liveconversation	Create	Basic
		Read, Share	Global
		Append, Append To, Update	Local
		Assign	Deep
Pane tool configuration	msdyn_panetoolconfiguration	Read	Global
Parameter (Deprecated)	msdyn_consoleapplicationtemplateparameter	Read	Global
Persona Security Role Mapping	msdyn_personasecurityrolemapping	Read	Global
Personal quick reply	msdyn_personalmessage	Append, Append To, Create, Delete, Read, Update	Basic
Personal sound setting	msdyn_Personalsoundsetting	Append, Append To, Create, Delete, Read, Update	Basic
PluginAssembly	PluginAssembly	Read	Global
PluginType	PluginType	Read	Global
Presence	msdyn_presence	Read	Global
Productivity pane configuration	msdyn_paneconfiguration	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Provisioning State	msdyn_ocprovisioningstate	Read	Global

Table name	Table unique name	Privilege name	Recommended access level
Queue	Queue	Append, Read	Global
Quick reply	msdyn_cannedmessage	Read	Global
Rating Model	RatingModel	Read	Global
Rating Value	RatingValue	Read	Global
Recording	msdyn_ocrecording	Read	Global
Role	Role	Read	Global
Routing configuration	msdyn_routingconfiguration	Read	Global
Routing configuration step	msdyn_routingconfigurationstep	Read	Global
Rule Item	msdyn_ocruleitem	Read	Global
Scenario	msdyn_scenario	Read	Global
SdkMessage	SdkMessage	Read	Global
SdkMessageProcessingStep	SdkMessageProcessingStep	Read	Global
SdkMessageProcessingStepImage	SdkMessageProcessingStepImage	Read	Global
Search Configuration	msdyn_searchconfiguration	Read	Global
Self service	msdyn_visitorjourney	Read	Global
Sentiment Analysis	msdyn_sentimentanalysis	Read	Global
Service Endpoint	ServiceEndpoint	Read	Global
Session event	msdyn_sessionevent	Read	Global
Session Template	msdyn_sessiontemplate	Read	Global
Session Characteristic	msdyn_ocsessioncharacteristic	Read	Global
Session participant	msdyn_sessionparticipant	Read	Global
Session Templates (Deprecated)	msdyn_consoleapplicationsessiontemplate	Read	Global
SharePoint Data	SharePointData	Create, Read, Update	Global

Table name	Table unique name	Privilege name	Recommended access level
SharePointDocument	SharePointDocument	Read	Global
Skill finder model	msdyn_ocskillidentmlmodel	Read	Global
Solution	Solution	Read	Global
Sound notification setting	msdyn_soundnotificationsetting	Append, Append To, Read	Global
System User	User	Read	Local
Tag	msdyn_octag	Append, Append To, Create, Delete, Read, Update	Global
Template Parameter	msdyn_templateparameter	Read	Global
Template Tag (Deprecated)	msdyn_templatetags	Read	Global
Training data import configuration	msdyn_ocsitdimportconfig	Read	Global
Training record	msdyn_ocsitrainingdata	Read	Global
Transcript	msdyn_transcript	Read	Global
UR notification template	msdyn_urnotificationtemplate	Read	Global
UR Notification Template Mapping	msdyn_urnotificationtemplatemapping	Read	Global
User settings	msdyn_usersetting	Append, Append To, Create, Delete, Read, Update	Global
Workstream capacity profile	msdyn_liveworkstreamcapacityprofile	Read	Local
Workstream	msdyn_liveworkstream	Append, Append To, Read	Global
		Assign, Share	Basic

See also

Overview of unified routing
Manage users for unified routing
Add custom security roles in Customer Service

Agent experience profiles

Article • 04/07/2023

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

Agent experience profiles enable you to create targeted app experiences for agents and supervisors, and are an alternative to building and maintaining custom apps. With the agent experience profiles, administrators can create custom profiles with specific session templates, conversation channels, and productivity tools. These profiles can then be assigned to users.

Agent productivity tools use intelligence and automation to enable agents to find answers to customer questions and help resolve customer issues quickly, improving satisfaction in service delivery. The productivity tools help in easy knowledge base search, suggestions for similar knowledge articles and cases, and agent scripts with macros to automate tasks in common workflows.

The profiles are available for agents and supervisors who use the Customer Service workspace or Omnichannel for Customer Service apps.

The system requirements for agent profiles and Customer Service workspace are the same. More information: System requirements for Customer Service workspace

How the agent experience profile works

Managing the agent experience profiles is as follows. The tasks in every step will be done by administrators who have different roles. It could be one administrator or a set of administrators.

1. Create users in Microsoft Dynamics 365 admin center.
2. Assign security roles, such as Customer Service Representative or Omnichannel agent.
3. Create business processes, such as work streams, queues, sessions, and productivity tools.
4. Create agent experience profiles.

5. Assign agent experience profiles to users.

For existing orgs, only steps 4 and 5 are required.

Thereafter, users with the required agent or supervisor role will be able to see and use the settings that are made available through the assigned agent experience profile. If you don't assign an agent experience profile, by default, the out-of-the-box agent experience profile will be assigned.

You can create and manage agent experience profiles in the Customer Service admin center app or in Power Apps.

See also

Create and use agent experience profiles
Create app profiles
System requirements

Roles and privileges associated with app profile manager

Article • 06/09/2022

The following roles are available with the app profile manager:

- App Profile Manager Administrator
- App profile user

If your organization uses custom roles, and you want a user with the custom role to manage app profiles, then you can either assign the App Profile Manager Administrator role or manually add the privileges pertaining to the App Profile Manager Administrator role to the custom role.

Roles for Customer Service workspace

By default, the privileges pertaining to the App Profile User role have been added to the Customer Service Representative and CSR Manager roles out of the box. You need to manually provide the App Profile Manager Administrator role to the user who will create app profiles, templates, productivity tools, and channel provider configurations.

Roles for Omnichannel for Customer Service

Out of the box, for the Omnichannel administrator role, the privileges pertaining to the App Profile Manager Administrator role have been added, and for the Omnichannel agent and Omnichannel supervisor roles, the privileges pertaining to the App Profile User role have been added.

Roles and their privileges

The actions and privileges for the roles in app profile manager are as follows.

Role: App Profile Manager Administrator

The App Profile Manager Administrator has the following privileges.

Action	Privileges

Action	Privileges
Read/Append user	prvAppendUser prvReadUser
Read/Assign role	prvAssignRole prvReadRole
Read/Write/Create/Delete channel provider	prvWritemsdyn_channelprovider prvReadmsdyn_channelprovider prvDeletemsdyn_channelprovider prvCreatemsdyn_channelprovider
Read/Write/Create/Delete/Append/Appendto application configuration	prvReadmsdyn_appconfiguration prvWritemsdyn_appconfiguration prvCreatemsdyn_appconfiguration prvDeletemsdyn_appconfiguration prvAppendmsdyn_appconfiguration prvAppendTomsdyn_appconfiguration
Read/Write/Create/Delete/Append/Appendto application extension	prvCreatemsdyn_applicationextension prvReadmsdyn_applicationextension prvWritemsdyn_applicationextension prvDeletemsdyn_applicationextension prvAppendmsdyn_applicationextension prvAppendTomsdyn_applicationextension
Read/Write/Create/Delete/Append/Appendto application tab template	prvReadmsdyn_applicationtabtemplate prvWritemsdyn_applicationtabtemplate prvCreatemsdyn_applicationtabtemplate prvDeletemsdyn_applicationtabtemplate prvAppendmsdyn_applicationtabtemplate prvAppendTomsdyn_applicationtabtemplate
Read/Write/Create/Delete/Append/Appendto notification field	prvReadmsdyn_notificationfield prvCreatemsdyn_notificationfield prvWritemsdyn_notificationfield prvDeletemsdyn_notificationfield prvAppendmsdyn_notificationfield prvAppendTomsdyn_notificationfield
Read/Write/Create/Delete/Append/Appendto notification template	prvReadmsdyn_notificationtemplate prvCreatemsdyn_notificationtemplate prvWritemsdyn_notificationtemplate prvDeletemsdyn_notificationtemplate prvAppendmsdyn_notificationtemplate prvAppendTomsdyn_notificationtemplate

Action	Privileges
Read/Write/Create/Delete/Append/Appendto session template	prvReadmsdyn_sessiontemplate prvCreatemsdyn_sessiontemplate prvWritemsdyn_sessiontemplate prvDeletemsdyn_sessiontemplate prvAppendmsdyn_sessiontemplate prvAppendTomsdyn_sessiontemplate
Read/Write/Create/Delete/Append/Appendto template parameter	prvReadmsdyn_templateparameter prvWritemsdyn_templateparameter prvCreatemsdyn_templateparameter prvDeletemsdyn_templateparameter prvAppendmsdyn_templateparameter prvAppendTomsdyn_templateparameter
Read/Write solution	prvReadSolution prvWriteSolution
Publish/Read/Write customization	prvPublishCustomization prvReadCustomization prvWriteCustomization
Read/Write Query	prvReadQuery prvWriteQuery
Read saved query visualizations	prvReadSavedQueryVisualizations
Read system form	prvReadSystemForm
Write entity	prvWriteEntity
Write attribute	prvWriteAttribute
Write relationship	prvWriteRelationship
Write/Read application module	prvWriteAppModule prvReadAppModule

Role: App Profile User

The App Profile User has the following privileges.

Action	Privileges
Read application module	prvReadAppModule
Read channel provider	prvReadmsdyn_channelprovider

Action	Privileges
Read application configuration	prvReadmsdyn_appconfiguration
Read application extension	prvReadmsdyn_applicationextension
Read application tab template	prvReadmsdyn_applicationtabtemplate
Read notification field	prvReadmsdyn_notificationfield
Read notification template	prvReadmsdyn_notificationtemplate
Read session template	prvReadmsdyn_sessiontemplate
Read template parameter	prvReadmsdyn_templateparameter
Read user	prvReadUser
Read role	prvReadRole

See also

An overview of app profile manager
Users and roles in Omnichannel for Customer Service

Create and use agent experience profiles

Article • 04/05/2023

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

By default, the following agent experience profiles are available out of the box for Customer Service workspace and Omnichannel for Customer Service. These profiles can't be deleted or modified. When you don't assign a custom profile to an agent, the default profile is assigned.

- Omnichannel for Customer Service - default profile
- Customer Service workspace - default profile
- Customer Service workspace + channels - default profile

You can configure agent experience profiles in Customer Service admin center or app profile manager. The app profile manager can be accessed through Power Apps.

Prerequisites

Make sure you have the App Profile Manager Administrator role. More information: Security roles

The Basic User role is also required to create profiles in Customer Service admin center.

Create agent experience profiles in Customer Service admin center

By using agent profiles, you can create targeted app experiences for agents and supervisors. Profiles help access the features that your agents and supervisors can use in their daily tasks to resolve customer issues.

1. Go to **Agent experience profiles** in **Agent experience** > **Workspaces**.

2. Select **New**, and enter the following details on the **Create a new agent experience profile** dialog.

   - **Name:** The app profile name.
   - **Unique name:** A unique identifier in the *<prefix>_<name>* format.
   - **Description:** A description for the profile.

3. Select **Create**. An agent experience profile is created.

Assign users, templates, configure productivity pane, channels

For the profile that you created, you can add users and configure option such as specific session templates, conversation channels, and productivity tools.

Go to **Agent experience profiles** and select the required agent experience profile. You can perform the following actions:

- Set an agent experience profile as the default profile. If you set a default profile, all the available users are associated with this profile. You can also assign a custom profile to a security role and assign a rank to the profile. More information: Add users to custom agent experience profiles

- In the **Users** section, specify the agents this profile must be associated with. Select **Add Users** to select users from the available users, or search for and add users to the profile.

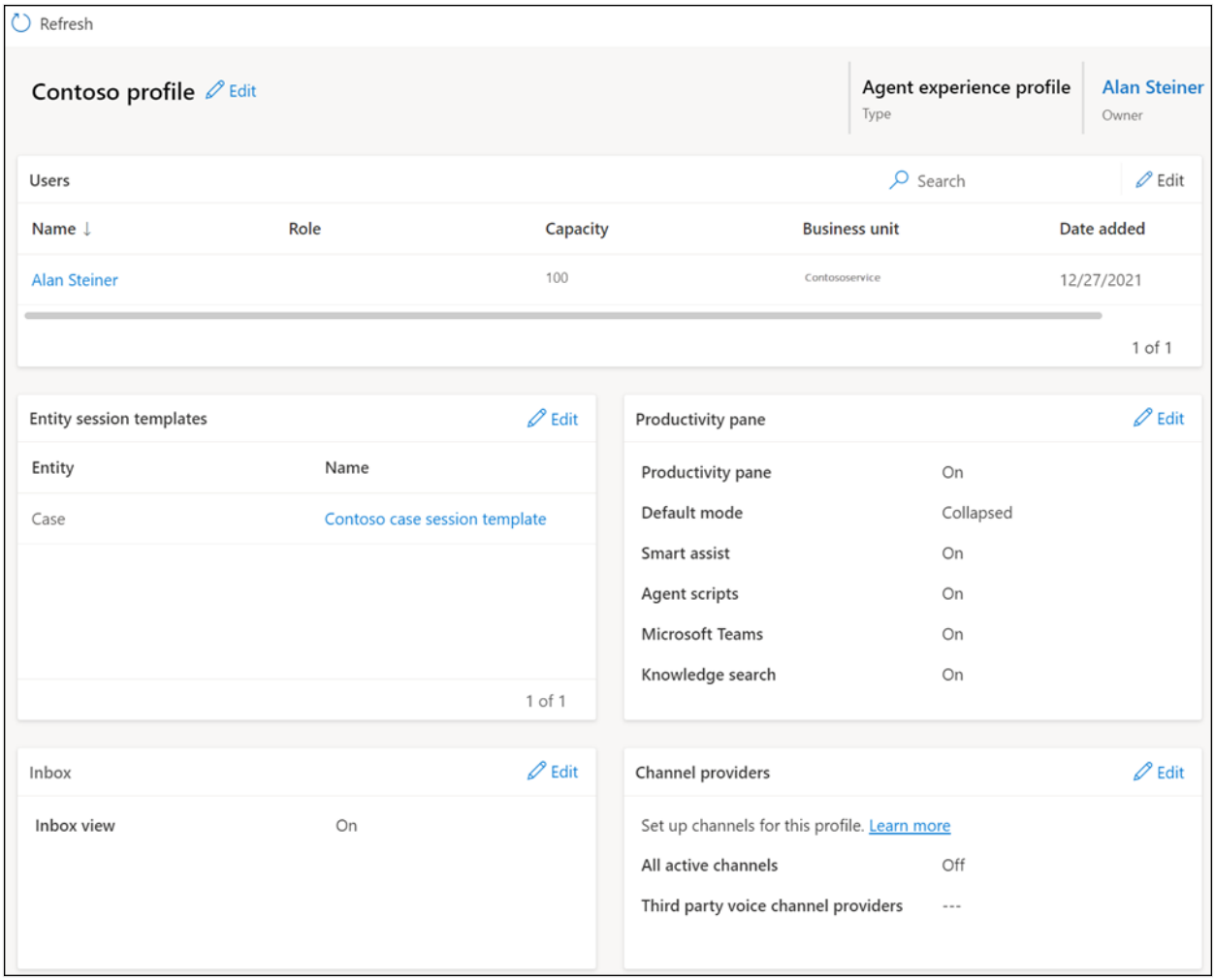
- Select **Add entity session template** to link a session template to the profile. On the **Entity session templates** pane, you can select an existing template or create a new entity session template.

- In the **Productivity pane**, select **Turn on** to enable the productivity tools that the agents can access when they work on their assigned tasks. The following productivity tool options are available:
  - Default mode
  - Smart assist
  - Agent scripts
  - Microsoft Teams
  - Knowledge search

  Turn on the toggle against each option in the **Productivity Pane** to enable it for the agent.

- In the **Inbox** section, select **Edit** to enable the inbox view. This allows agents to view all their work items on one screen and helps them to prioritize tasks and efficiently work on multiple tasks.

- In the **Channel providers** section, select **Edit** to enable the channels and select third-party voice channel providers. On the **Channel providers** pane you can:
  - Turn on the **All active channels** toggle
  - Select a channel provider or create channel providers in the **Third party voice channel providers** section.



See also

Manage session template
Overview of Dynamics 365 Productivity Tools
Overview of channels in Omnichannel for Customer Service
Overview of agent experience profiles

Add users to agent experience profiles

Article • 07/13/2023

When your organization has a large number of users, adding them to agent profiles can be time consuming. As an administrator, you can effectively assign users to agent experience profiles and provide a targeted app experience, based on their roles.

Set a custom agent experience profile as default

You can set a custom agent experience profile as the default profile. When you've set a default profile, all the options configured in the profile such as specific session templates, conversation channels, and productivity tools are available for all the users.

> **Note**
>
> - The custom agent experience profile that's set as the default isn't applicable to users who are assigned specific custom agent experience profiles.
> - You can't set the out-of-the-box agent experience profiles as the default.

For example, you've created a new agent experience profile, Contoso Agent profile, with knowledge search and agent scripts features enabled. If you set the Contoso Agent profile as the default profile, all the users in the organization can access knowledge search and agent scripts in the productivity pane.

You also have another agent experience profile, Datum Agent profile, with specific user, Angel Chiu. Only the smart assist feature is enabled for the profile.

In this scenario, Contoso Agent profile doesn't apply to Angel Chiu, and the user can access only the smart assist feature in the productivity pane.

To set the agent experience profile as a default profile, perform the following steps:

1. In **Customer Service admin center** select **Workspaces** in **Agent experience**.
2. On **Agent experience profiles** select a custom agent experience profile, and then select **Set as default**.

Switch default profiles

You can't set multiple profiles as the default profile. If you must change the default profile, use **Remove Default** to remove the default status and then set an alternate profile as the default profile.

Map security roles to agent experience profiles

When you have multiple user groups with different roles and privileges, you can assign agent experience profiles to a security role to provide customized app experiences for each group. The application assigns the agent profile to all the users with the specified security role.

If users have multiple security roles, the applications links the profile with the higher rank to the user.

For example, your organization has both Customer Service Representative and Omnichannel agent roles to which users are assigned. The table summarizes the mapping of agent experience profiles to the corresponding roles.

Agent experience profile	Rank	Security Role
Contoso Agent profile	1	Customer Service Representative
Datum Agent profile	2	Omnichannel agent

All the agents with the Customer Service Representative role get the options enabled in the Contoso Agent profile. Users with Omnichannel agent role see the options set in the Datum Agent profile.

The user, John Doe, has both the Customer Service Representative and Omnichannel agent roles assigned. The application assigns the Contoso agent profile to John Doe, as the rank of the profile is higher.

To add a security role and rank to an agent experience profile, perform the following steps:

1. In **Customer Service admin center** select **Workspaces** in **Agent experience**.
2. On **Agent experience profiles** select a custom agent experience profile, and then select **Set rank and roles**. You can't set security roles and rank to the out-of-the-box profiles.

When you set a custom profile as the default, the following changes occur:

- You can't set security roles and rank to the out-of-the-box profiles.
- You no longer can assign security roles to the default profile.

- Existing security roles will be removed.

1. In **Profile rank and roles assignment** specify the following:

    - **Rank**: Used to determine the custom agent experience profile that must be mapped to a user when multiple roles are assigned to a user.
    - **Roles**: The user roles that the custom agent experience profile can be mapped to.

Remove rank and roles assigned to a profile

Select the required agent experience profile and then select **Remove rank and roles** to remove the rank and roles assigned to the profile. If you select this option, all the roles mapped to the profile will be removed.

Manage users assigned to agent experience profiles

The application lets you set a default agent experience profile and assign security roles to a profile. However, if a profile is assigned a security role, the default agent experience profile isn't applicable to the users with the specific security role.

For example, you've set up your agent experience profiles and mapped users as summarized in the table:

Agent experience profile	Rank	Security Role	User
Contoso Supervisor profile	1	Omnichannel Supervisor	
Datum Agent profile	2	Omnichannel agent	Kendall Collins
Contoso Agent profile			Default
Datum Supervisor profile			Gabriel Diaz, Kayla Lewis

Here's how the application assigns the agent expereince profiles:

- Users with the Omnichannel Supervisor role are assigned the Contoso Supervisor profile.
- Users with the Omnichannel agent role are assigned the Datum Agent profile.
- Users with both the Omnichannel Supervisor and the Omnichannel agent role are assigned the Contoso Supervisor profile.
- User Kendall Collins is assigned the Datum Agent profile.
- Users Gabriel Diaz and Kayla Lewis are assigned the Datum Supervisor profile.
- All the remaining users are assigned the Contoso Agent profile.

> ⓘ **Note**
>
> If you haven't set a default custom profile or assigned an agent experience profile to a role, the application assigns the default out-of-the box profile to all the available users.

FAQs

For more information about adding users to agent experience profiles, see FAQs about adding users to agent experience profile

See also

FAQ about adding users to agent experience profile
Create and use agent experience profiles
Manage session template
Overview of Dynamics 365 Productivity Tools
Overview of channels in Omnichannel for Customer Service
Overview of agent experience profiles

Configure the inbox

Article • 10/03/2023

As an administrator, you can configure the inbox setting so that when your agents open Customer Service workspace or Omnichannel for Customer Service, they can select the inbox icon to show all the cases and conversations that are assigned to them. The inbox is designed to help agents efficiently work on high velocity tasks, and promote inbox sessions to regular sessions when they need more time to resolve cases and complete their conversations.

You can configure the inbox settings for custom experiences only.

You can also configure and enable the inbox in app profile manager.

The following channels are supported in the inbox:

- Live chat
- Asynchronous chat
- Case
- Email
- Voice

The following asynchronized channels are available in the conversation inbox.

- SMS
- Persistent chat
- Facebook
- WeChat
- LINE
- WhatsApp
- Teams

Live chat and voice channel in inbox

The following are things to note about live conversation settings in the inbox:

- When an agent accepts a live work item, that item is then added to the relevant view in the inbox, whether or not the agent is using the inbox at the time of the live work item.
- Voice calls always open as a new session with the card added to the inbox for awareness.
- Live work item cards have a "live" visual indicator.

- Live work item unread counts accrue to the unread count on the view.

Configure the inbox setting for agents

You can configure the inbox in the Customer Service admin center by editing the agent experience profile to meet your preferred inbox settings.

1. Open the Customer Service admin center app.
2. In **Agent experience**, select **Workspaces**.
3. In **Agent experience profiles**, select **Manage**.
4. Select the profile for which you want to configure the inbox.

   > ⓘ **Note**
   >
   > Channel providers must have **All active channels** set to **On** to use and configure the chat setting in the inbox.

5. In **Inbox**, select the **Settings** icon, and then toggle **Inbox** to on.
6. You can either modify an existing view or create a new one by selecting **Edit**. The following fields can be configured:

   - **Name:** Specify a name that shows in the inbox. Alphanumeric values are valid names.
   - **Record Type:** Select the record types for which the settings need to be applied. You can select more than one record type.
   - **Chat Status**: Is available if you select the record type as chat. Select one or more of the following settings:
     - **Assigned**
     - **Unassigned**
     - **Resolved**
   - **Email**: Is available if you select the record type as Email. Select all the options that you want to enable.
     - Assigned to me:
       - Emails sent to me
       - Emails assigned to me
     - Unassigned:
       - Emails in my team
       - Emails in my queue(s)

    - Emails in a shared mailbox
- **Agent Visibility**: Select one of the following options to show or hide the view to agents:
    - **Show**
    - **Hide**

Preconfigured inbox views

The following views are supported out of the box in the inbox:

- **Cases**: Shows all cases that the user owns, including active and resolved cases.
- **Assigned Conversations**: Shows all conversations that have been assigned to the user, including active and closed conversations.
- **Resolved Conversations**: Shows all conversations that have been marked as closed, and where the user was the primary agent in the conversation.
- **Unassigned Conversations**: Shows all active conversations and emails in a team or queue in which the user is a member. The user is able to assign conversations to themselves and reply to emails directly from this view.

Inbox views are refreshed every five minutes. Agents can manually refresh the view by using the **Refresh** icon.

Configure custom views for the inbox

You can configure a customized view for the inbox so that agents can see their cases, conversations, emails, and voicemails all in a single view.

To configure multiple views for the inbox, complete the following steps.

1. Go to the agent experience profile for which you want to configure a custom view.

2. On the **Inbox** card, select **Edit**. The **Inbox** page is displayed.

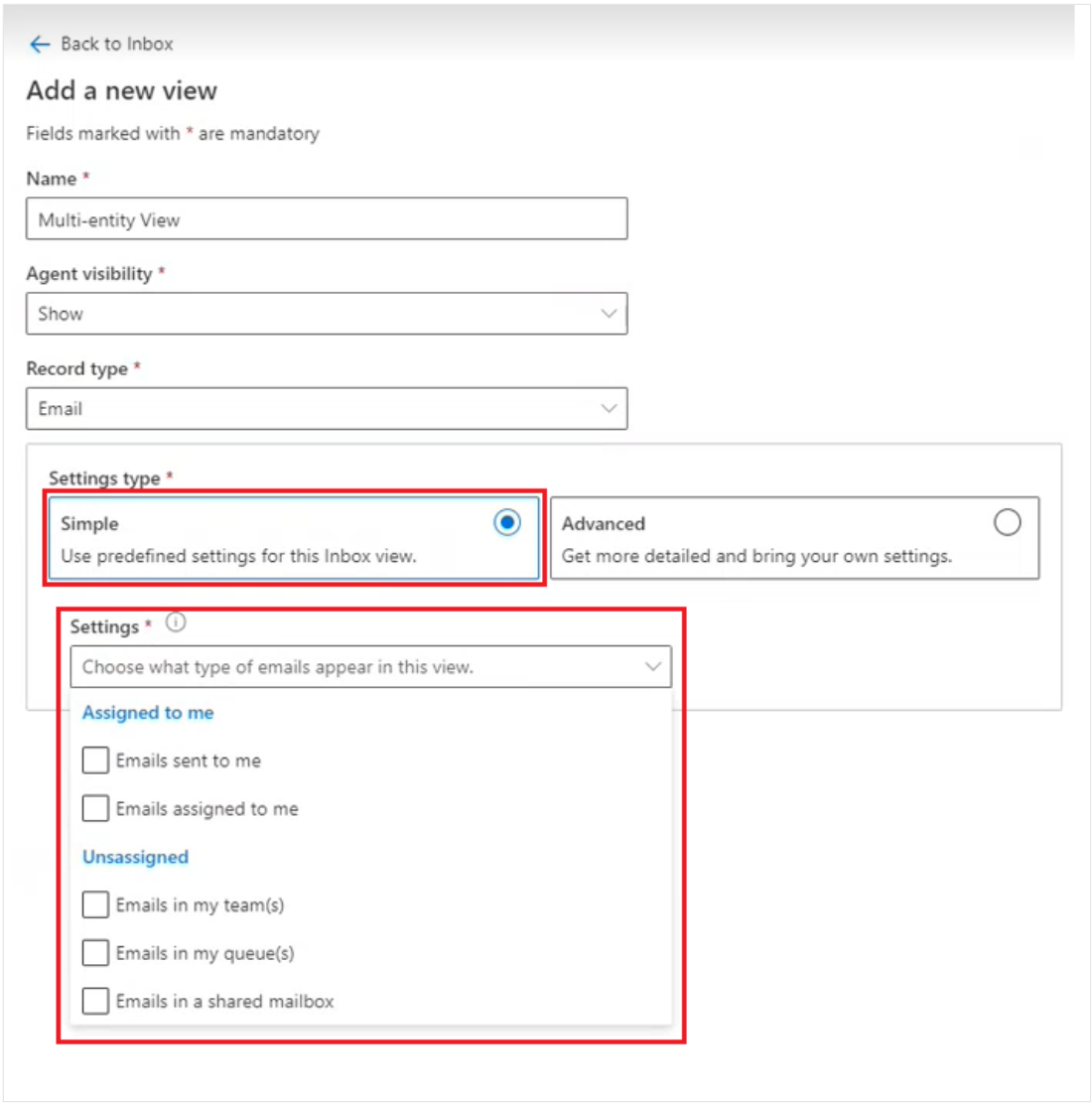
3. Toggle **Enable Inbox** to **On** if it isn't already on, and then select **+ Add**. The **Add a new view** page is displayed.

4. On the **Add a new view** page, enter the following details:

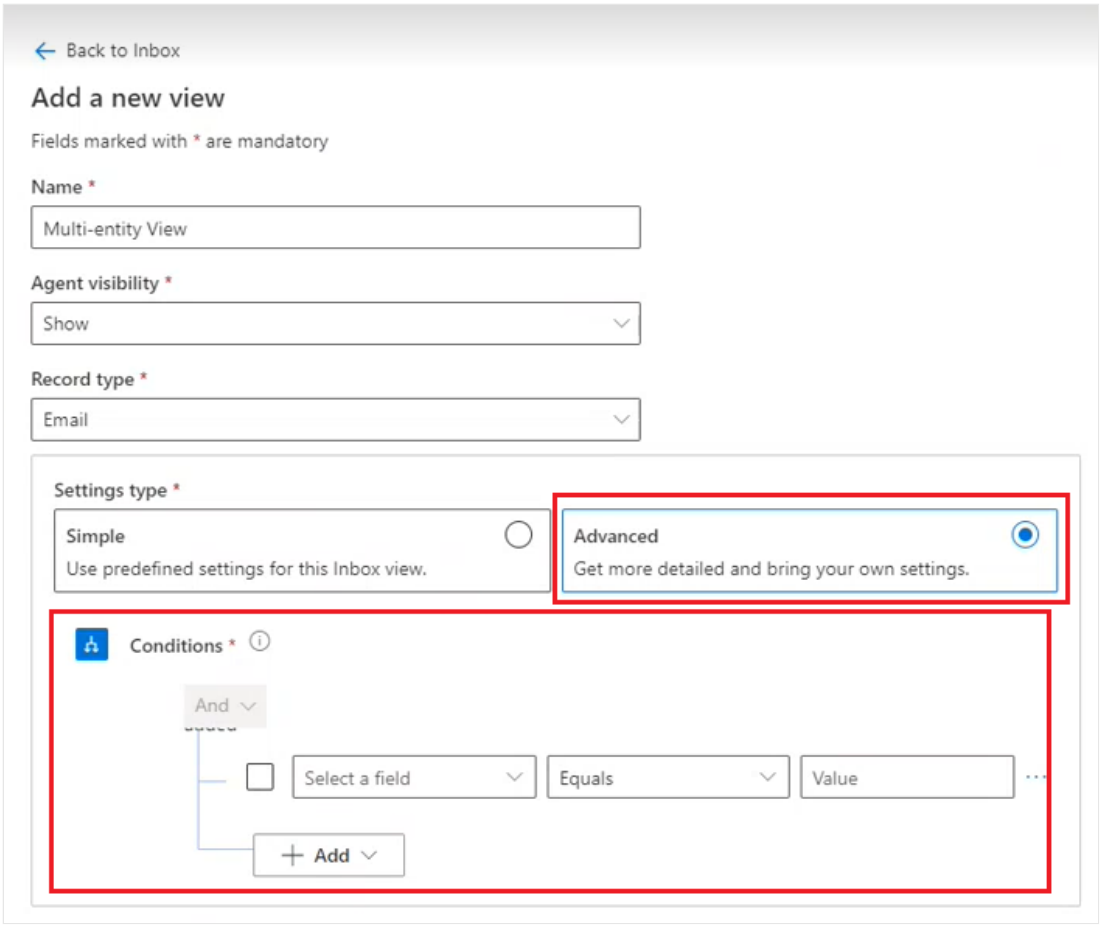
    - **Name**: Type a name for the view.
    - **Agent visibility**: Select whether to **Show** or **Hide** the view from agents.
    - **Record type**: Select the records that you want to include in the multi-entity view.

5. For each record type, choose one of the following settings. The settings are different for each record type.

   - **Simple** opens a dropdown menu where you can choose the type of records that appears in your multi-entity view. More information: Simple settings



   - **Advanced** opens a **Conditions** option where you can set the desired conditions for your multi-entity view. More information: Advanced condition builder



6. Select **Save**.

Simple settings

The following simple settings are available out of the box for the record types.

Record type	Simple settings
Email	- Emails sent to me - Emails assigned to me - Emails in my team(s) - Emails in my queue(s) - Emails in a shared mailbox
Chat	- Assigned - Unassigned - Resolved
Case	- Cases assigned to me - Cases in my team(s) - Case(s) in my queue(s)
Voicemail	- Assigned - Unassigned - Resolved

Real-time translation

For information about how to configure real-time translation for conversations in the inbox, see Enable real-time translation of conversations

See also

Create and use agent experience profiles
Overview of agent experience profiles
Use the inbox
Configure voicemail to manage inbound calls

Configure the agent calendar view

Article • 10/28/2023

As an administrator or a supervisor, you can help agents in your organization view their work schedules. The **My Schedule** view in the Dynamics 365 Customer Service workspace app lets agents quickly view their working hours, nonworking hours, breaks, and any scheduled time off.

The calendar view is a read-only visual that provides daily, weekly, and monthly views of an agent's schedule. It also has an agenda view that provides a list-type view of the agent's schedule.

Prerequisites

- You must have **Workforce Management for Customer Service** enabled in your environment.

  To enable Workforce Management, complete the following steps:

  1. Navigate to your environment in Power Platform admin center (PPAC).

     > **Note**
     >
     > You must have the System Administrator role to make changes to your environment.

  2. On the command bar, select **Resources** > **Dynamics 365 apps**. The Dynamics 365 apps page is displayed.
  3. Select **Install app**. The **Install Dynamics 365 apps** page is displayed.
  4. Scroll down to locate and select **Workforce Management for Customer Service**, and then select **Next**.
  5. You must agree to the terms of service, and then select **Install**.
  6. Wait until the **Workforce Management for Customer Service** shows as installed on the **Dynamics 365 apps** page.

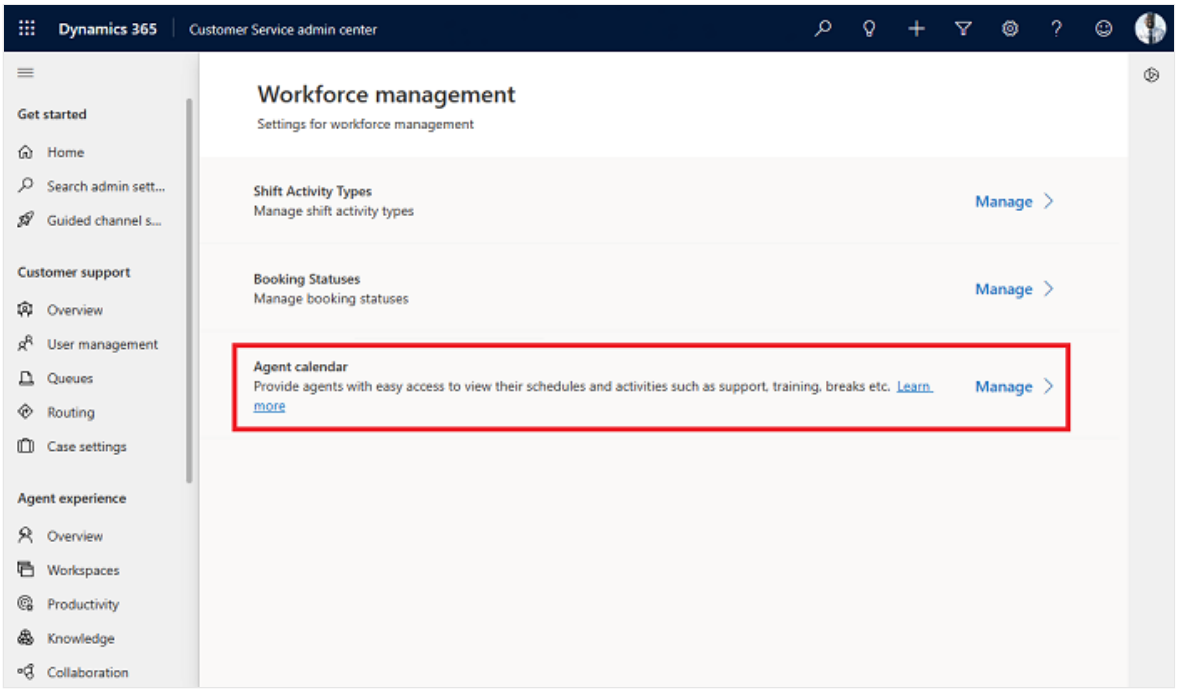
- To enable the calendar view for agents, you must have at least one of the following roles:
  - System Administrator

    - CSR Manager
    - Omnichannel administrator
    - Omnichannel supervisor

- You must have a third-party adapter configured to import agent bookings from an external system. Without an adapter in place, external bookings can't be surfaced in the agent calendar, and agents can't view their schedules.

Enable the agent calendar

1. In the Customer Service admin center site map, select **Workforce management**.
2. In the **Agent calendar** section, select **Manage**. The **Agent calendar** page is displayed.



3. Turn on the **Enable agent calendar** toggle.
4. Select **Save and close**.

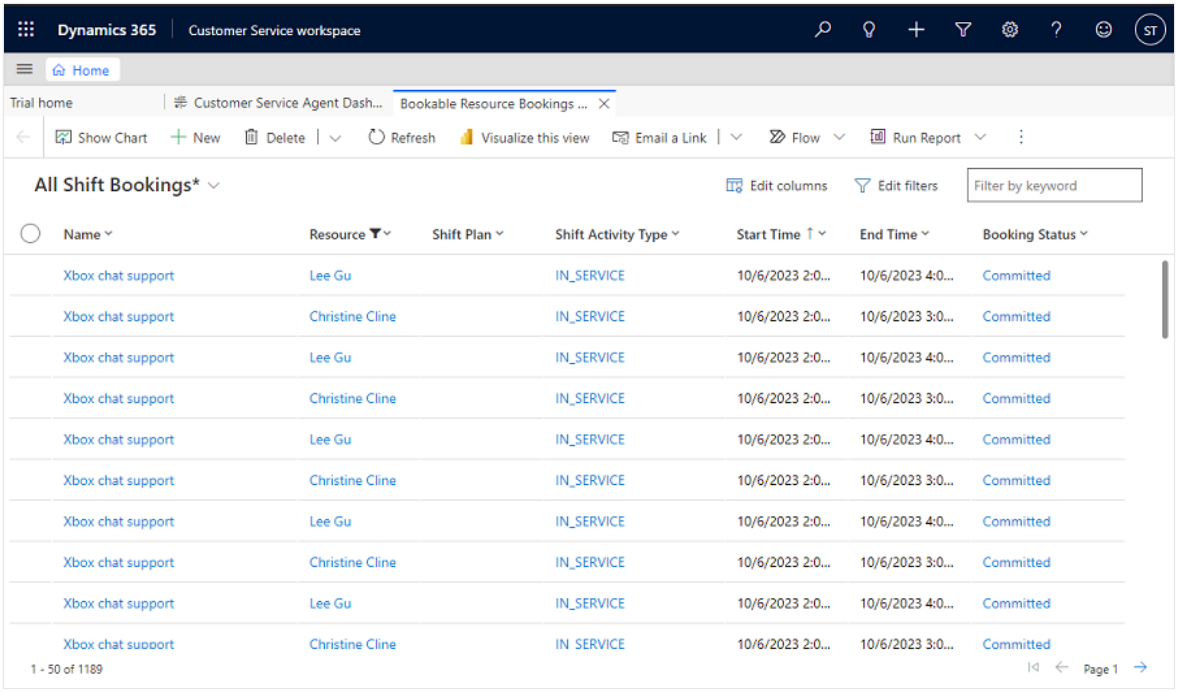
Shift bookings view for supervisors

The shift booking list view lets supervisors view the bookings that are imported from their third-party workforce management system. Supervisors can use this view to access a consolidated list of bookings for all agents in their system. The shift bookings view offers a comprehensive breakdown of each agent's individual activities, including work hours, time off, lunch breaks, trainings, and more.

Administrators can utilize this view to verify the proper functioning of the third-party adapter booking sync process.

1. In Customer Service workspace, expand the site map, and then select **Shift Bookings**.

2. Select the **All Shift Bookings** view.



Next Steps

Get started with Customer Service workspace

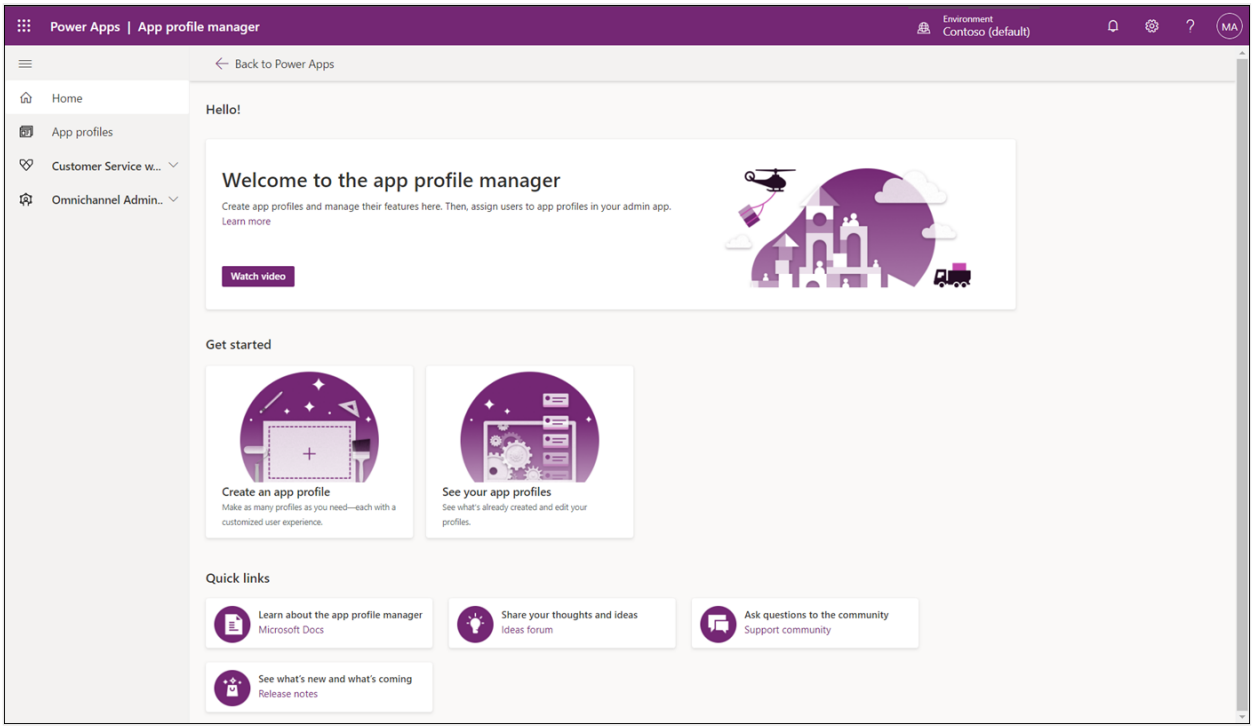
Use the agent calendar view

Experience for accessing templates and productivity tools

Article • 09/30/2022

> **Important**
>
> With the release of the Customer Service admin center app that consolidates admin experiences across the Customer Service suite, we announce that the following admin experiences are deprecated and no longer supported after April 2023.
>
> - Service Management area in the Customer Service Hub app
> - Omnichannel admin center
> - **App profile manager:** Is removed in April 2023.
>
> Also, starting in October 2022, the Omnichannel admin center and the service management area in Customer Service Hub will be hidden by default in newly created organizations and environments. You have the option to bring them back, but we recommend that you start using the Customer Service admin center app to perform tasks like manage cases, and configure unified routing, channels, and agent experience profiles. More information: **Get started with Customer Service admin center**

The app profile manager is an easy-to-use interface that helps you get started with what you can do on the page.

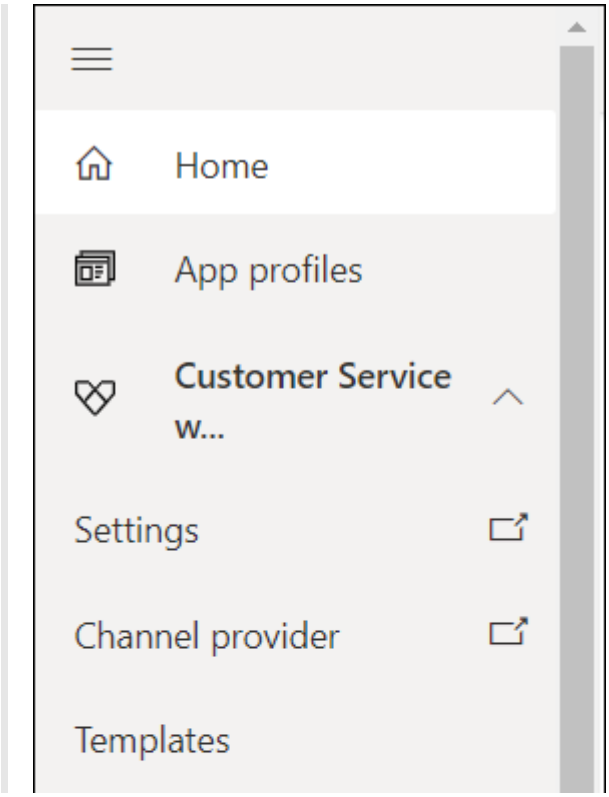


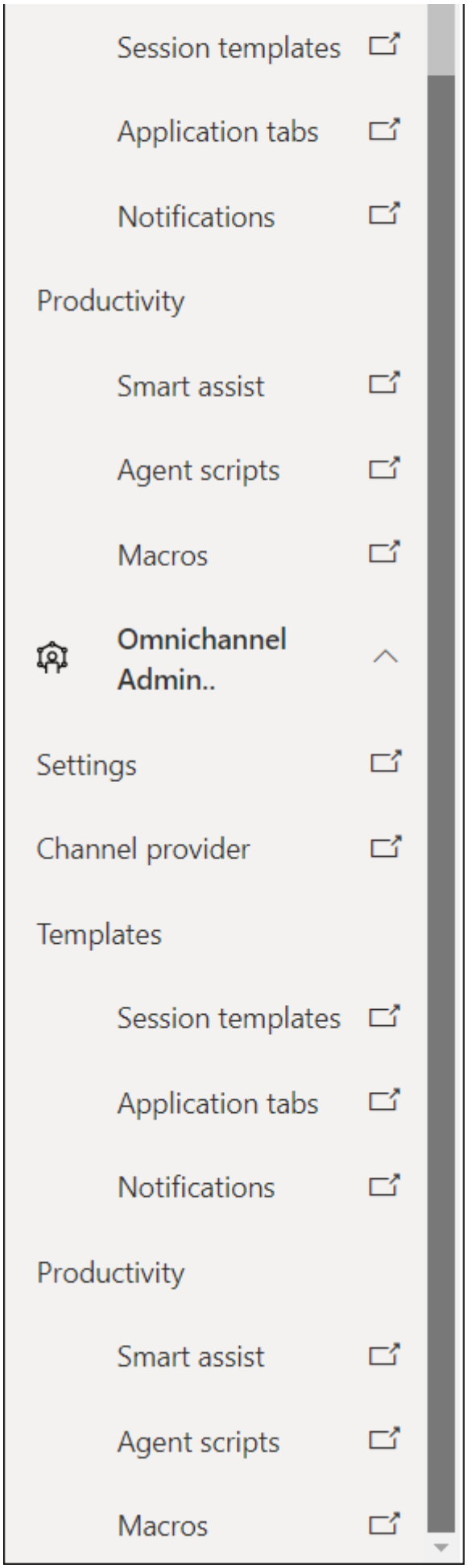
> **ⓘ Important**
>
> *Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the **Dynamics 365 Customer Service pricing overview** and **Dynamics 365 Customer Service pricing plan** pages.*

The options to access and manage the following entities are available on the left pane of the app profile manager:

- Settings
- Channel provider
- Templates
  - Session templates
  - Application tabs
  - Notifications
- Productivity
  - Smart assist
  - Agent scripts
- Macros

All these options are available in Unified Interface. Select any of the option to open it in a new tab.




Session templates
Application tabs
Notifications
Productivity
Smart assist
Agent scripts
Macros
Omnichannel Admin..
Settings
Channel provider
Templates
Session templates
Application tabs
Notifications
Productivity
Smart assist
Agent scripts
Macros

Irrespective of the path from where you navigate to any of the components, such as session templates or application tab templates, the templates that you've defined for Customer Service workspace and Omnichannel for Customer Service will be displayed because they're stored in a common library.

Settings

Select **Settings** in **Customer Service workspace** to open the **Queues** page on a new tab.

Select **Settings** in **Omnichannel Administration** to open the **Entity Records** page on a new tab.

Channel provider

The **Channel provider** option in **Customer Service workspace** or **Omnichannel Administration** opens the channels view on a new tab where you can configure a new channel or update the settings of the existing providers.

Templates

The following template types can be accessed:

- **Session templates:** Opens the Session templates page where the out-of-the-box templates and custom templates created by you're listed.
- **Application tabs:** Opens the application tab templates page to create and manage application tab templates.
- **Notifications:** Opens the notifications templates page to manage the templates.

Productivity

You can access the following options in the **Productivity** area:

- **Smart assist:** Opens the settings for AI-based suggestions for similar cases, knowledge articles, and ongoing conversations.
- **Agent scripts:** Opens the agent scripts page for you to create and manage scripts.
- **Macros:** Opens the macros page for you to create and manage macros.

Upgrade experience for existing Omnichannel for Customer Service

When you upgrade your existing environments, the settings for templates, productivity tools, and channels configuration in the out-of-the-box app profile will reflect the existing state of your environment. For example, if productivity pane is enabled and smart assist is configured, the settings will be retained in the out-of-the-box app profile.

See also

Create and use agent experience profiles Manage session templates
Configure channels

Create an app profile

Article • 02/01/2023

> **ⓘ Important**
>
> With the release of the Customer Service admin center app that consolidates admin experiences across the Customer Service suite, we announce that the following admin experiences are deprecated and no longer supported after April 2023.
>
> - Service Management area in the Customer Service Hub app
> - Omnichannel admin center
> - **App profile manager:** Is removed in April 2023.
>
> Also, starting in October 2022, the Omnichannel admin center and the service management area in Customer Service Hub will be hidden by default in newly created organizations and environments. You have the option to bring them back, but we recommend that you start using the Customer Service admin center app to perform tasks like manage cases, and configure unified routing, channels, and agent experience profiles. More information: **Get started with Customer Service admin center**

Perform the following steps to create an app profile:

1. Sign in to Power Apps.
2. Select the environment in which you want to create the app profiles.
3. Do one of the following:

    - On the **Home** page, go to **Your apps** section.
    - In the left pane, select **Apps**.

4. Select **More commands** in **Omnichannel for Customer Service** or **Customer Service workspace**, and then select **App profile manager** on the menu that appears.
5. In the left pane, select **App profiles**.
6. On the **App profile manager** page, select **New profile**.
7. On the **New profile** pane, specify the following:

    - **Name:** The app profile name.
    - **Unique name:** A unique identifier in the *<prefix>_<name>* format.

        > **ⓘ Important**

The following are required for the unique name:

- The prefix can only be alphanumeric and its length must be between 3 to 8 characters.
- An underscore must be used between the prefix and name.

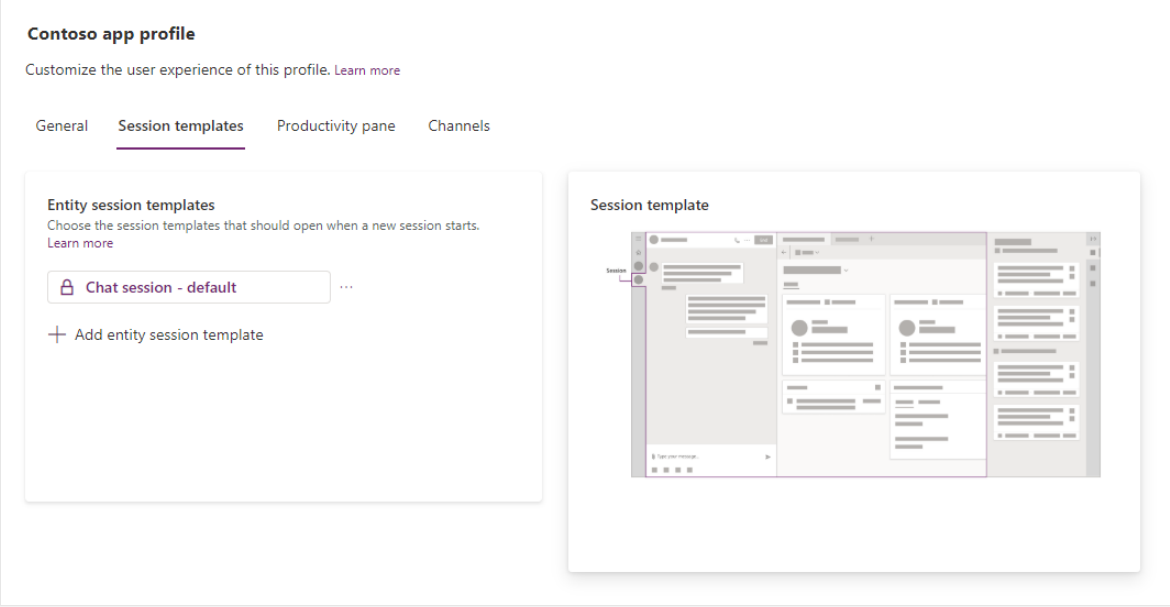
- **Description:** A description for the profile.

Assign templates and enable productivity pane and channels

For an app profile, you can add only one session template for each entity type. Typically, you'll add one session template for each entity type, such as one each session template for accounts, contacts, and cases.

The settings that you enable for the app profile will be available for agents and supervisor only when you configure the corresponding templates and settings in the Customer Service Hub or Omnichannel admin center app. For example, channels must be provisioned in Omnichannel for Customer Service and channel instances must be configured.

1. In the **App profiles** section, select the app profile to which you want to assign templates.
2. On the **Session templates**, select **Add entity session template**.
3. Search for the template you want to add and select it. Make sure that the selected template is based on **Entity** type. More information: Manage session templates



4. Do the following on the **Productivity pane** tab:

a. If you want to enable productivity tools, set the toggle to on for **Turn on productivity pane**.
b. Select the default mode as collapsed or expanded.
c. In the **Productivity tools** section, set the toggle to on for the following:

- **Smart assist tool configuration**
- **Knowledge search tool configuration**
- **Agent scripts** to allow access to smart assist configuration and agent scripts.

5. On the **Channels** tab, set the toggle to on for **All active channels**. The channels configured in Omnichannel for Customer Service will be available for the user to whom the profile is assigned.

> ⓘ Note
>
> The toggle for channels will be enabled in the out-of-the-box app profile for Omnichannel for Customer Service.

6. To add a third-party channel provider, in the **Voice channels** section, select **Add channel providers**, search for the configured channel, and select it.

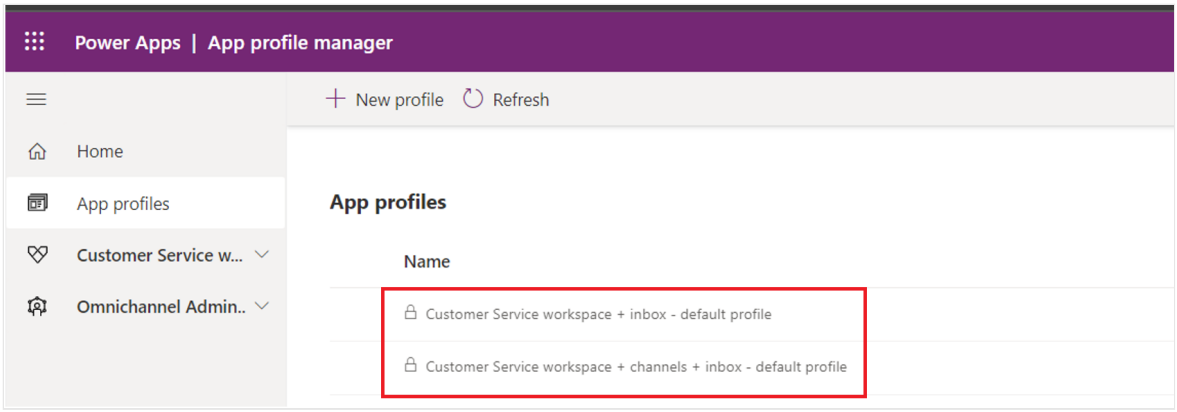
7. If a channel doesn't exist, select **Create a new channel provider in Unified Interface**. The channel configuration page opens on a new tab. More information: Configure channel provider using app profile manager

> ⓘ Note
>
> - Only telephony or voice channels are supported.
> - A number of voice channel providers can be configured at a time.

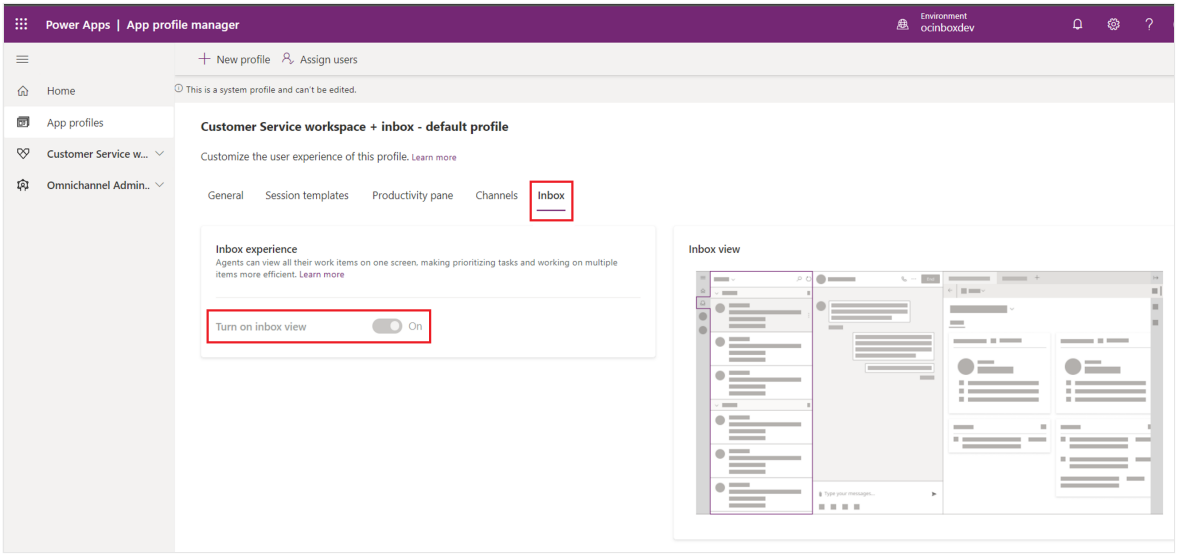
Configure the inbox view

For an app profile, you can enable the inbox view in the Customer Service workspace or Omnichannel for Customer Service apps. From the inbox, users can view their conversations and cases.

1. On the **App profiles** page, select the profile for which you want to enable the inbox.

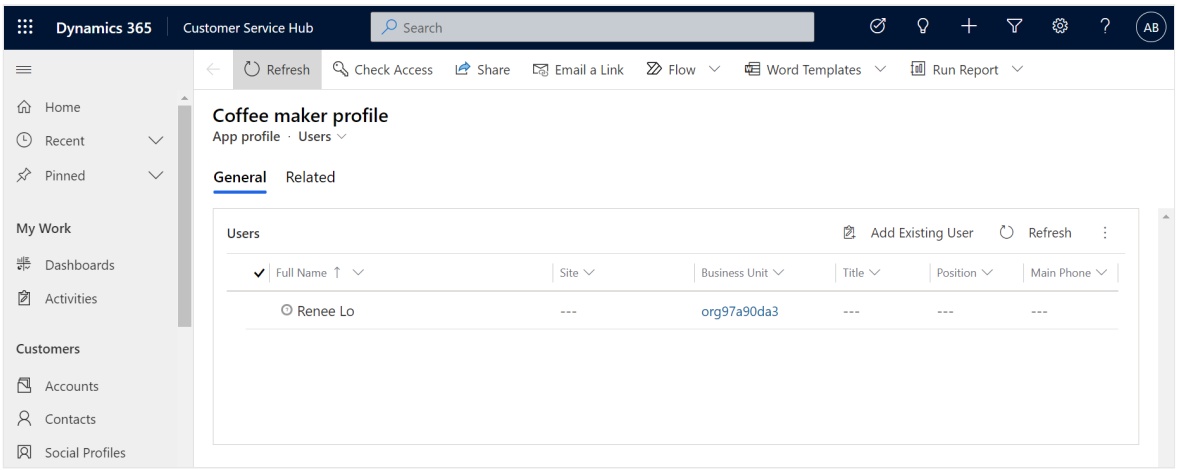


2. Select the **Inbox** tab, and then toggle **Turn on inbox view** to **On**.



Assign profiles to users

1. On the **App profiles** page, select the profile that you want to assign to a user.
2. On the <***profile_name***> page, select **Assign users** on the command bar, and select **OK** on the message dialog box. The profile opens on a new tab.



3. On the **General** tab, select **Add Existing User**.
4. On the **Lookup Records** pane, search and select the user.

> **Note**
>
> You can select **Assign users** on the <***profile_name***> page to view the list of users who have been assigned to the profile.

Default profile assignment

When users are assigned roles corresponding to Customer Service workspace or Omnichannel for Customer Service, the default app profiles are assigned as follows.

- **Customer Service workspace**: Users with the CSR Manager and Customer Service Representative roles.
- **Omnichannel for Customer Service**: Users with the Omnichannel administrator, Omnichannel supervisor, and Omnichannel agent roles.

More information: Roles and privileges associated with app profile manager

See also

Get started with Customer Service admin center
Configure agent experience profiles
Manage session templates
Configure channels
Manage agent scripts

Agent experience profiles

Article • 04/07/2023

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

Agent experience profiles enable you to create targeted app experiences for agents and supervisors, and are an alternative to building and maintaining custom apps. With the agent experience profiles, administrators can create custom profiles with specific session templates, conversation channels, and productivity tools. These profiles can then be assigned to users.

Agent productivity tools use intelligence and automation to enable agents to find answers to customer questions and help resolve customer issues quickly, improving satisfaction in service delivery. The productivity tools help in easy knowledge base search, suggestions for similar knowledge articles and cases, and agent scripts with macros to automate tasks in common workflows.

The profiles are available for agents and supervisors who use the Customer Service workspace or Omnichannel for Customer Service apps.

The system requirements for agent profiles and Customer Service workspace are the same. More information: System requirements for Customer Service workspace

How the agent experience profile works

Managing the agent experience profiles is as follows. The tasks in every step will be done by administrators who have different roles. It could be one administrator or a set of administrators.

1. Create users in Microsoft Dynamics 365 admin center.
2. Assign security roles, such as Customer Service Representative or Omnichannel agent.
3. Create business processes, such as work streams, queues, sessions, and productivity tools.
4. Create agent experience profiles.

5. Assign agent experience profiles to users.

For existing orgs, only steps 4 and 5 are required.

Thereafter, users with the required agent or supervisor role will be able to see and use the settings that are made available through the assigned agent experience profile. If you don't assign an agent experience profile, by default, the out-of-the-box agent experience profile will be assigned.

You can create and manage agent experience profiles in the Customer Service admin center app or in Power Apps.

See also

Create and use agent experience profiles
Create app profiles
System requirements

Manage session templates

Article • 04/05/2023

A session template is a combination of attributes and application tab information that can be reused.

In Omnichannel for Customer Service app, when an agent accepts an incoming conversation request from a customer, a session is started. The system opens the **Active Conversation** application that you (an administrator) defined as an **Anchor Tab** in the application tab panel. The **Anchor Tab** can't be closed. Simultaneously, the system expands the communication panel for you to exchange messages with the customer.

Session templates are used to define the aforementioned session experience, such as:

- which application must be opened as an anchor tab in the application tab panel;
- what are the additional application tabs that must be opened when a session is started;
- what must be the default mode of the communication panel when a session is started.

You can create session templates in Customer Service admin center or use the out-of-the-box templates. In your environment, as an administrator, you can create multiple session templates.

> ⓘ **Note**
>
> You can't customize the out-of-the-box session templates; instead, you'll need to create your own custom templates.

The out-of-the-box session template for using in Customer Service workspace is Case entity session - default template.

The following out-of-the-box session templates are of the generic type and are for use in the Omnichannel for Customer Service app:

- Case entity session - default template
- Chat session - default
- Voice call session - default
- Custom messaging session - default
- Entity records session - default
- Facebook session - default
- LINE session - default

- SMS session - default
- Teams session - default
- Twitter session - default
- WeChat session - default
- WhatsApp session - default

Create a session template

1. In the site map of Customer Service admin center, select **Workspaces** in **Agent experience**.
2. On the **Workspaces** page, select **Manage** for **Session templates**.
3. Select **New** on the **Active Session Templates** page.
4. Specify the following on the **New Session Templates** page.

Tab	Name	Value description	Example
General	Name	Specify the name of the session. This name won't be visible to the agents at the runtime.	Chat session
General	Unique Name	A unique identifier in the *<prefix>_<name>* format. **IMPORTANT** The following are required for the unique name: • The prefix can be alphanumeric only and its length must be between 3 to 8 characters. • An underscore must be there between the prefix and name. You can select the light bulb icon, and then select **Apply** to verify whether the name you've entered meets the requirements.	msdyn_chat_custom

Tab	Name	Value description	Example
General	Type	Select one of the following: • **Entity:** If you select entity, the **Entity** field is displayed. • **Generic:** Select when the template is required to be assigned to any channel.	Entity
General	Entity	Select an entity from the list. **Note:** The option is displayed only when **Type** is entity.	Case
General	Title	Provide the title of the session that you want agents to see at the runtime.	{customerName}
General	Communication panel mode	Select the default mode of the panel when a session is started. Choose one of the following: • **Docked**: The panel will be in expanded mode. • **Minimized**: The panel will be in minimized mode. • **Hidden**: The panel will be hidden. **Note**: For an entity routing session—that is, for a case session—the communication panel mode is hidden.	Docked
General	Session Icon	Select an icon to represent the channel from which the conversation is initiated so that your agent can visually identify the channel. **Note**: • Is available for generic type of templates only. • A web resource file for the icon must be deployed. • You can use a web resource file only and not slugs to customize the session icon. • GIF files aren't supported.	WhatsApp.ico

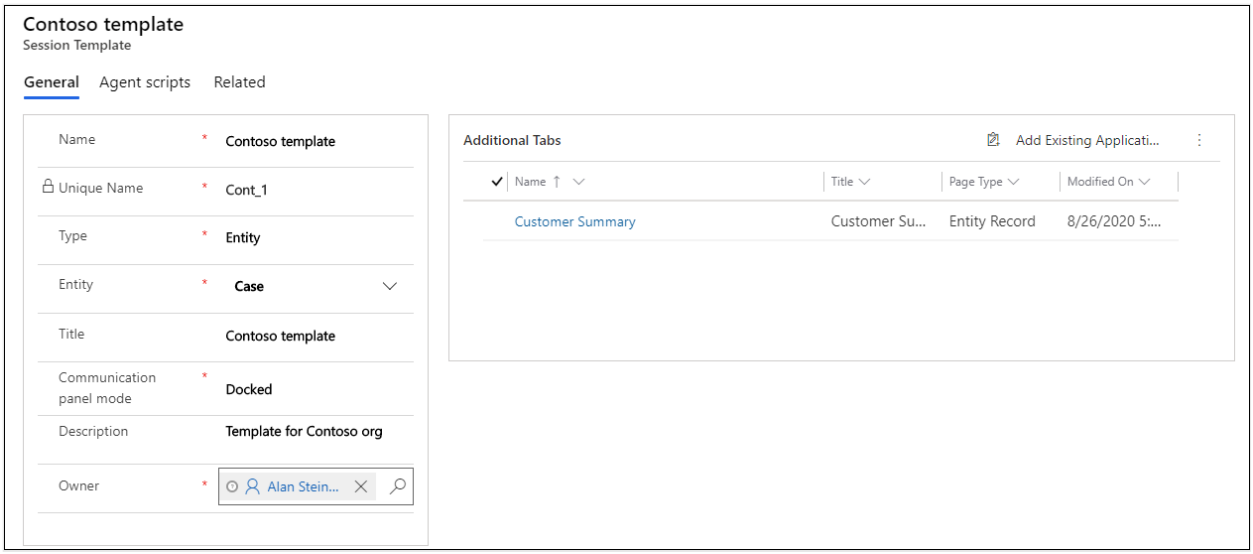
Tab	Name	Value description	Example
General	Description	Provide a description for your reference.	The session template is used for a conversation request from Chat channel.
General	Owner	Search and select an owner. By default, the user who is creating the template is set as the owner	Alan Steiner
General	Anchor tab	Select an application from the list. The application is opened by default when the session starts and can't be closed. **Note:** The anchor tab option is displayed only when **Type** is generic.	Customer summary

5. Select **Save**.

Associate application tabs, agents scripts with session templates

You can associate application tabs that need to open when a session is started. Agents can't close these application tabs. You can also associate agents scripts; however, you must first configure the agent scripts. More information: Agent scripts

1. Go to the session template that you want to modify.
2. In the **Additional Tab** section, Select **Add Existing Application Tab Template**. The **Lookup Records** pane appears.
3. Type the application tab names in the search box and select the search icon. A list of records appears. Select the application tabs, and then select **Add**. The application tabs are added to the session template.
4. Select the **Agent scripts** tab, and set the **Enable build expression** toggle to **Yes** to define the expression to set an agent script as default for a particular session template.
5. Build the expression, and then select **Save and close**. To learn more, see Set default agent script for agents.
6. Select **Save**.



The session template is configured. Now, you must associate the session template with a workstream. To learn more, see Associate templates with workstreams.

See also

Get started with Customer Service admin center
Manage application tab templates
Manage notification templates
Associate templates with workstreams

Manage application tab templates

Article • 10/20/2023

An application tab template in Customer Service lets you specify the type of applications that can be opened when agents start a session in the Customer Service workspace or Omnichannel for Customer Service app.

The vertical bar on the left panel shows the list of sessions. The panel will always show the **Home** session that can't be closed or customized.

Every session has at least one application tab, called the "Anchor tab", that can't be closed or customized. When you start a session, the corresponding application page and any other additional pages are opened based on your configuration settings.

Using the application tab template, you can define applications that are available for a session, and then associate those applications with the session. For example, you can create the **Active Conversation** page tab and associate it with a chat or SMS session. Now, when an agent accepts a notification from the chat or SMS channels, a session starts and the **Active Conversation** page opens.

As an administrator, you can create multiple application tab templates.

> ⓘ **Note**
>
> You can't customize the out-of-the-box templates, but can create your own custom templates.

Create application tab templates

1. Select one of the following tabs, and perform the steps.

   Customer Service admin center

   a. In the site map, select **Workspaces** in **Agent experience**.
   b. On the **Workspaces** page, select **Manage** for **Application tab templates**.

2. Select **New** on the **Active Application Tab Templates** page.

3. Specify the following on the **New Application Tab Template** page.

Tab	Name	Description	Example
General	Name	Specify the name of the application tab. This name isn't visible for the agents at runtime.	Knowledge article search
General	Unique name	Provide a unique identifier in the *<prefix>_<name>* format. **IMPORTANT** The following are required for the unique name: • The prefix can only be alphanumeric and its length must be between 3 and 8 characters. • An underscore must be added between the prefix and name. You can select the light bulb icon, and then select	contoso_application_tab

Tab	Name	Description	Example
		Apply to verify whether the name you've entered meets the requirements.	
General	Title	Provide a title for the application that you want the agents to see at runtime.	Knowledge article search
General	Page type	Select a page type from the list.	Web resource
General	Description	Provide a description for your reference.	The page type is used to display a knowledge base search page.

4. Select **Save**. The **Parameters** section displays the parameters for the page type that you selected.

   > ⓘ Note
   >
   > Whenever you edit the application tab template, save the changes so you see the corresponding fields in the **Parameters** section.

5. Select the **Value** field of a parameter that you want to edit and provide the value.

6. Select **Save**.

Page types

The following page types are available.

- Dashboard
- Entity list
- Entity record
- Search
- Third-party website
- Web resource
- Control (for internal use only)
- Custom

Dashboard

This page type is used to display the dashboard as an application. The following parameter is available for the dashboard page type.

Parameter	Description	Required	Supported values	Example
`dashboardId`	GUID of the dashboard	Yes	String	`d201a642-6283-4f1d-81b7-da4b1685e698`

> ⓘ Note
>
> If the target dashboard isn't included in the app module definition, the default dashboard is displayed instead.

Entity list

This page type is used to display an entity view that defines how a list of records for a specific entity is displayed. The following parameters are available for the entity view page type.

Parameter	Description	Required	Supported values	Example
`entityName`	Logical name of the entity	Yes	String Slugs	account `{anchor._customerid_value@Microsoft.Dynamics.CRM.lookuplogicalname}`
`viewId`	GUID of the view	No	String	`00000000-0000-0000-00aa-000010001031`

> **Note**
>
> If the target view doesn't exist or isn't included in the app module definition, the default entity view is displayed instead.

Entity record

This page type is used to display an existing record or open a form to create a new record.

The following parameters are available for the entity record page type when an existing record is opened.

Parameter	Description	Required	Supported values	Example
`entityName`	Logical name of the entity	Yes	String Slugs	account `{anchor._customerid_value@Microsoft.Dynamics.CRM.lookuplogicalname}`
`entityId`	GUID of the entity record	No	String Slugs	`d49e62a8-90df-e311-9565-a45d36fc5fe8` `{anchor._customerid_value}`
`formId`	GUID of the form instance	No	String	`915f6055-2e07-4276-ae08-2b96c8d02c57`

The following parameters are available for the entity record page type when an entity form is opened to create a new record:

Parameter	Description	Required	Supported values	Example
`entityName`	Logical name of the entity	Yes	String Slugs	contact `{anchor._customerid_value@Microsoft.Dynamics.CRM.lookuplogicalname}`
`data`	Data to be prepopulated in the form	No	JSON	`{"subject":"Task created from {anchor.ticketnumber}","description":"Follow-up needed with customer","prioritycode":"2","scheduledend":"06/12/2023", "regardingobjectid": [{"id": "{anchor.incidentid}", "name": "{anchor.title}", "entityType":"{anchor.entityName}"}]}`

Parameter	Description	Required	Supported values	Example
`formId`	GUID of the form instance	No	String	`915f6055-2e07-4276-ae08-2b96c8d02c57`

Search

The following parameters are available for the entity search page type.

Parameter	Description	Required	Supported values	Example
`searchType`	Define to use Relevance search or Categorized search. The possible values are: • **0** for Relevance search • **1** for Categorized search	No	Number	0

`searchText`	Define the string you want to search.	Yes	String
			Slugs
			OData
				contoso
				`{anchor.title}`
				`{anchor._customerid_value@OData.Community.Display.V1.FormattedValue}`
				`{$odata.incident.title.?$filter=incidentid eq '{anchor.incidentid}'&$select=title}`

Third-party website

This page type is used to display third-party websites as an application. You can use this type to host only those websites that are compatible with iframe hosting. If your website isn't compatible with iframe hosting, an error message that the website refused to connect is displayed. The application tab template parses the URL and data parameters to format the URL address to be displayed.

Parameter	Description	Required	Supported values	Example
`url`	The website URL to be displayed in the app tab	Yes	String	`https://www.bing.com/search?q=`

`data`	Additional data parameter to be parsed with the `url` parameter	No	String
			Slugs
			OData
				contoso
				`{anchor.title}`
				`{anchor._customerid_value@OData.Community.Display.V1.FormattedValue}`

Parameter	Description	Required	Supported values	Example
				`{$odata.incident.title.?$filter=incidentid eq '{anchor.incidentid}'&$select=title}`

> **Note**
>
> When an agent switches from the third-party website type of tab template to another tab, and then switches back to the third-party website tab template, the page will be refreshed to the initial state. For more information, see the "Third-party application tab refreshes when focus is changed" section in the Known issues document.

How parsing works

These examples are based on a scenario where the case was opened as the Anchor tab in a new session with ticket number: `CAS-01003-P3B7G1`.

`url` parameter: `https://www.bing.com/search?q=`
`data` parameter using slugs: `{anchor.ticketnumber}`
Expected URL: `https://www.bing.com/search?q=CAS-01003-P3B7G1`

`url` parameter: `https://www.bing.com/search?q=`
`data` parameter using OData: `{$odata.incident.ticketnumber.?$filter=incidentid eq'{anchor.incidentid}'&$select=ticketnumber}`
Expected URL: `https://www.bing.com/search?q=CAS-01003-P3B7G1`

> **Note**
>
> The `url` parameter requires the correct URL format using 'https://'.

Web resource

This page type is used to display web resources that represent files, which are used to extend the web application such as HTML files, JavaScript, CSS, and several image formats. The following parameters are available for the web resources page type.

Parameter	Description	Required	Supported values	Example
`webresourceName`	Name of the web resource to open	Yes	String	`new_myresource.html`

`data`	Provide string or key value pair, according to the requirement	No	String
			Slugs
			OData
				contoso
				`{anchor.title}`
				`{anchor._customerid_value@OData.Community.Display.V1.FormattedValue}`
				`{$odata.incident.title.?$filter=incidentid eq '{anchor.incidentid}'&$select=title}`

Parameter	Description	Required	Supported values	Example
	of the web resource.			

> **Note**
>
> When an agent switches from the web resource type of tab template to another tab, and then switches back to the web resource type of tab template, the page will be refreshed to the initial state. For more information, see the "Third-party application tab refreshes when focus is changed" section in the **Known issues document**.

Custom

This page type is used to display custom pages on the application tab. You can use this tab template type to host custom pages that are available in the corresponding app module. For more information about custom pages, see Overview of custom pages for model-driven apps.

The following parameters are available for custom pages.

Parameter	Description	Required	Supported values	Example
`entityName`	Logical name of the entity	No	String	incident
			Slugs	`{anchor.entityName}`
`name`	Unique name of the custom page	Yes	String	`new_mycustompage`
`recordId`	GUID of the entity record	No	String	`d49e62a8-90df-e311-9565-a45d36fc5fe8`
			Slugs	`{caseId}`
				`{anchor.incidentid}`
			OData	`{$odata.incident.title.?$filter=incidentid eq '{anchor.incidentid}'&$select=title}`

Out-of-the-box application tab templates

The following out-of-the-box application tab templates are available.

Template name	Description	Application type
Active Conversation	Displays the Active Conversation page in the tab.	Entity Record
Entity record	Displays an entity record in the tab.	Entity Record
Knowledge Search	Displays the knowledge article search page in the tab.	Web Resource
Omnichannel Conversations Dashboard	Displays the Omnichannel Conversations Dashboard in the tab.	Dashboard
Omnichannel Intraday Insights	Displays a Power BI report in the tab.	Control

Template name	Description	Application type
Quick Reply Preview	Displays a quick reply in the tab.	Control
Rich Message Preview	Displays a rich message in the tab.	Control
Search	Displays the Omnichannel search page in the tab.	Control

See also

Get started with Customer Service admin center
Manage session templates
Manage notification templates
Associate templates with workstreams

Manage notification settings and templates

Article • 10/16/2023

When a notification is sent to an agent, it displays certain information, such as the customer from who the conversation request is coming, the timeout period after which the notification will disappear, and accept and reject buttons. Each organization has varied business requirements and wants the notifications to show relevant information to the agents.

As an administrator, system integrator, or partner, you can use the out-of-the-box templates for notifications or create your own. A notification template is a combination of notification-related, reusable information. The template is used to configure what information needs to be displayed to the agents and supervisors for an incoming conversation, escalation, transfer, or consult.

Desktop notifications

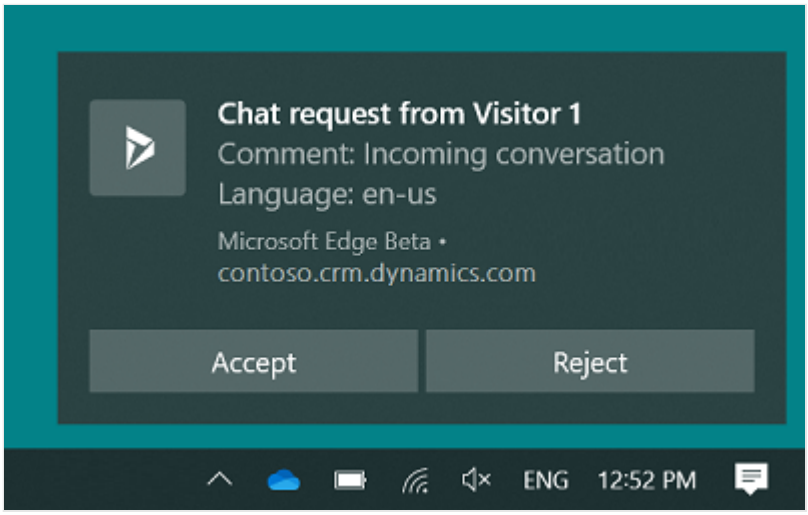
For optimal functioning of desktop notifications, make sure that you are using the latest supported browsers as specified in the system requirements.

Desktop notifications help ensure that agents won't miss any conversation requests. Based on your configuration, agents can receive notification alerts on their desktop always or when the Customer Service workspace or Omnichannel for Customer Service app isn't in focus. Some scenarios where the app isn't in focus might include:

- The agent has minimized the app.
- The agent is working in another browser window.
- The agent is working on another tab of the browser.
- The agent is using two screens, and is on the screen that doesn't have either the Customer Service workspace or Omnichannel for Customer Service app.

> **Note**
>
> - The **Always(preview)** option for **Show Desktop Notifications** is in preview. To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**.

- The legacy version of Microsoft Edge is not supported for desktop notifications.



Agents can accept or reject the conversation request by selecting a button on the desktop notification. When an agent accepts the conversation, the app is made active and displayed to the agent, and a session is started.

If the agent selects the notification message body and not a button, the app is made active and the notification is displayed to the agent in the app. Then the agent can choose to accept or reject the conversation by selecting the appropriate button.

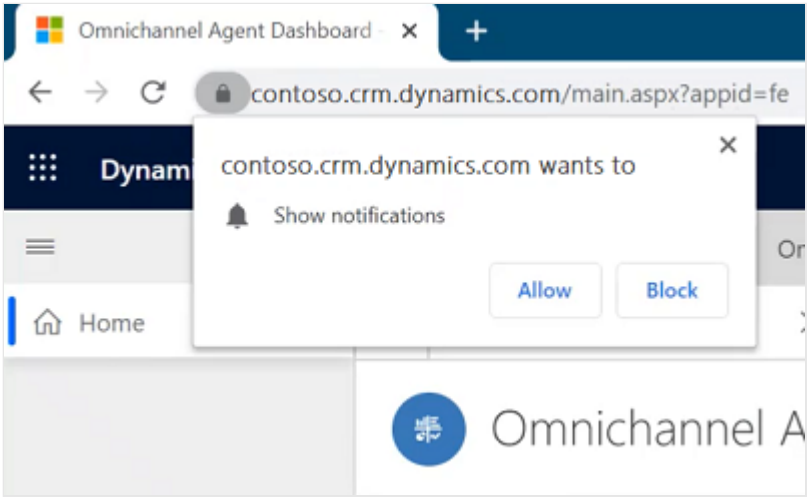
You can configure the wait time and the notification is displayed for the agent according to this time, but wait time isn't displayed on the notification. The desktop notification theme is based on the Windows operating system theme and settings.

> ⓘ **Note**
>
> - Desktop notifications will not work when the browser is opened in incognito mode or if focus assist is turned on in your Windows 10 operating system.
> - If the native browser notification option is disabled, the notification will be shown in a different user interface.

Allow a browser to show notifications

To get desktop notifications, agents need to allow their browser (Microsoft Edge or Google Chrome) to show them. When an agent gets a browser notification, they need to select **Allow**. Based on your requirements, you can enable or disable notifications in the browser settings.

Also, as an administrator, you can set the browser notification permission by using group policy.



Notification fields

The fields that are shown in the notification are based on the notification template configuration. To learn more, see Slug for notification field header and Create a notification template.

Slugs for notification field header

A slug is a replacement parameter that is populated at runtime based on the context variables.

The notification shows certain fields and values, called **Field header** and **Value** respectively.

For example, a customer Kenny Smith initiates a conversation. When the agent sees the notification, it displays **Customer Name** as **Kenny Smith**.

Here, **Field header** is **Customer Name** and the **Value** is **Kenny Smith**.

For the application to identify the name of the customer as **Kenny Smith**, as an administrator, you must configure slugs as the value. The Omnichannel system replaces the slug with the actual value that is extracted based on the context variables.

The application supports the following slugs.

Slug	Description
`{customerName}`	Name of the customer who initiates the conversation.

Slug	Description
`{caseId}`	GUID of a case. The case ID is displayed only if a case is linked to the conversation.
`{caseTitle}`	Title of the case. The title of the case is displayed only if a case linked to the conversation.
`{queueId}`	GUID of a queue.
`{visitorLanguage}`	The language in which the customer initiates the conversation.
`{visitorDevice}`	The device of the customer who initiates the conversation.
`{entityRoutingLogicalName}`	Name of the entity if the notification is for entity records.
`{entityRoutingRecordId}`	GUID of the entity record if the notification is for entity records. To learn more, see Entity records routing.
`{customerEntityName}`	Name of the entity (contact or account entity) if the customer is authenticated.
`{customerRecordId}`	GUID of the entity (contact or account entity) if the customer is authenticated.
`{<name of the pre-chat survey question>}`	All the pre-chat survey questions that are configured for a work stream can be used as the slug. The format is same as the question.

Manage templates

Out-of-the-box notification templates

For the supported channels, Customer Service provides you with out-of-the-box notification templates that you can use in your environment. When you attach the out-of-the-box notification template, the default settings are used in the notifications. For customers whose record exists in Dynamics 365, the settings in the authenticated template for notifications are used. If the customer details are not available in Dynamics 365, the settings in the unauthenticated template are used for displaying the notifications. For information on the notifications behavior and what the notifications display for agents, see notifications for agents.

The out-of-the-box templates are as follows.

Channel/Entity	Consult	Authenticated	Unauthenticated	Transfer	Other
Chat	Chat - consult - default	Chat - incoming authenticated - default	Chat - incoming unauthenticated - default	Chat - transfer - default	
Custom messaging	Custom messaging - consult - default	Custom messaging - incoming authenticated - default	Custom messaging - incoming unauthenticated - default	Custom messaging - transfer - default	
Facebook	Facebook - consult - default	Facebook - incoming authenticated - default	Facebook - incoming unauthenticated - default	Facebook - transfer - default	
LINE	LINE - consult - default	LINE - incoming authenticated - default	LINE - incoming unauthenticated - default	LINE - transfer - default	
SMS	SMS - consult - default	SMS - incoming authenticated - default	SMS - incoming unauthenticated - default	SMS - transfer - default	
Microsoft Teams	Teams - consult - default	Teams - incoming authenticated - default	Teams - incoming unauthenticated - default	Teams - transfer - default	
Twitter	Twitter - consult - default	Twitter - incoming authenticated - default	Twitter - incoming unauthenticated - default	Twitter - transfer - default	
WeChat	WeChat - consult - default	WeChat - incoming authenticated - default	WeChat - incoming unauthenticated - default	WeChat - transfer - default	
CDS entity					CDS entity - Default assigned
Customized					Customized notification template

Channel/Entity	Consult	Authenticated	Unauthenticated	Transfer	Other
Sentiment					Sentiment threshold alert - supervisor
Voice	Voice call - consult - default	Voice call - incoming authenticated - default	Voice call - incoming unauthenticated - default	Voice call - transfer - default	Voice call - supervisor assign - default

> **Note**
>
> - You can't customize the out-of-the-box notification templates; instead, you'll need to create your own custom templates.
> - If you use custom notification templates for record routing, we recommend that you do not add a reject option. By design, the record will be assigned to the routed agent even if you provide the option to the agent to reject the assignment.

Create a notification template

To create the notification template

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Workspaces** in **Agent experience**.
   b. On the **Workspaces** page, select **Manage** for **Notification templates**.

2. On the **Templates** tab, select **New Notification Template** in the **Active Notifications Templates** area.

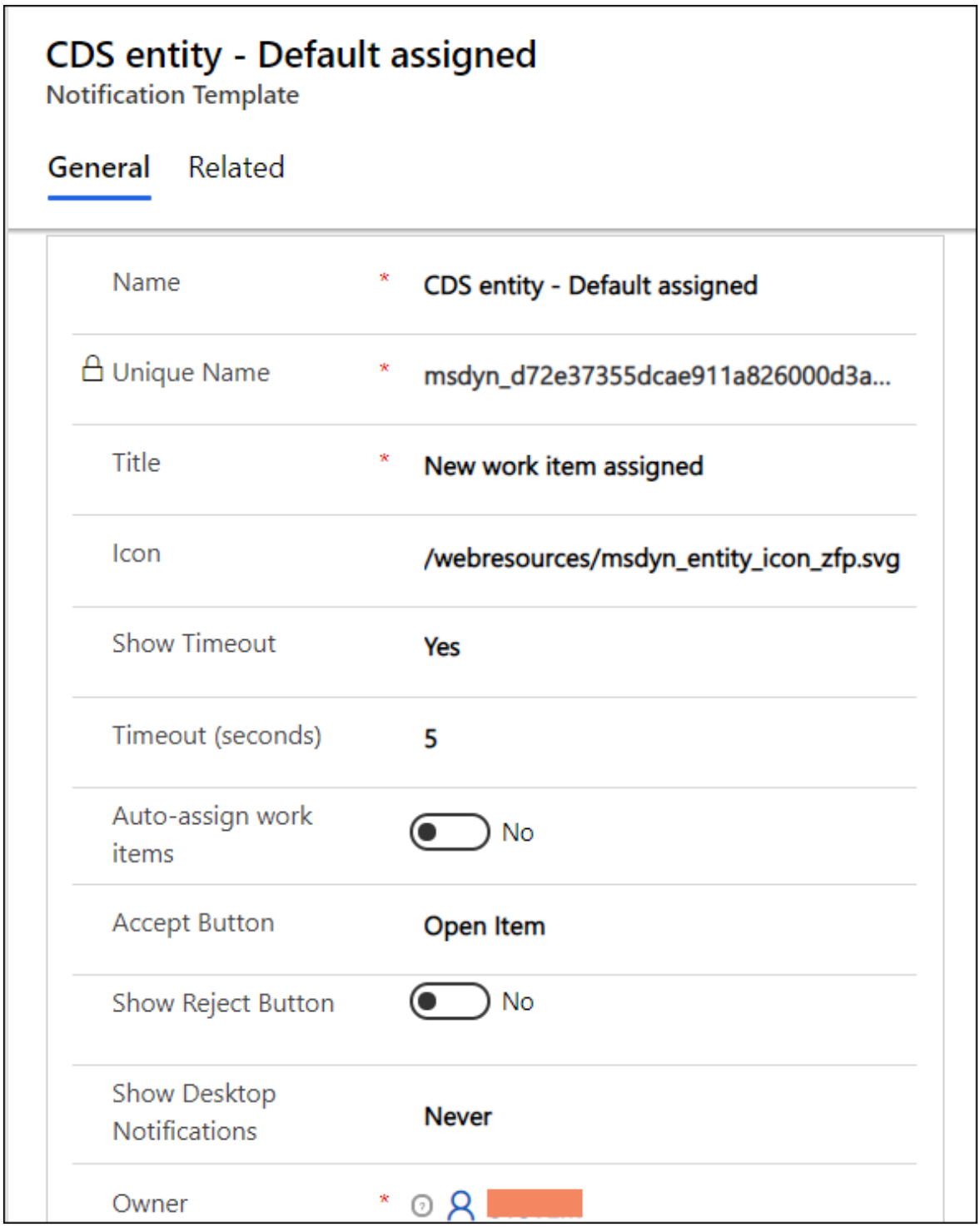
3. Specify the following in the **New Notification** page.

Tab	Name	Value, description	Example
General	Name	Specify the name for the notification. This name wouldn't	Authenticated chat notification

Tab	Name	Value, description	Example
		be visible for the agents at the run-time.	
General	Title	Provide a title to the notification that you want the agents to see at the run-time.	Incoming chat conversation
General	Icon	Select web resource path to add an icon.	/webresources/msdyn_chat_icon_zfp.svg **Note:** - This is the default value. You can change the icon as your requirement. - If you enable the **Show desktop notifications** option, and if you use svg icon format, then the svg icon won't be shown in the desktop notifications.
General	Show timeout	Yes	Set **Yes** to show the timer in the notification, or **No** to hide the timer in the notification for the agents. **Note:** - Irrespective of whether you set **Yes** or **No** to show or to hide the timeout value for the agent, the timer runs, and after the timeout duration, the notification disappears. - **Yes** is the default value for the templates when you get the latest release of Omnichannel for Customer Service. - When you upgrade from previous to the latest release of Omnichannel for Customer Service, then existing notification templates will show no value for this field in the user interface. However, the notification templates consider the values as **Yes**, and display the timer to the users at the runtime. - If you enable the **Show desktop notifications** option, then the timer won't be shown in the desktop notifications.
General	Countdown (seconds)	Provide a duration in seconds; after this duration elapses, the	120. **Note:** This is the default value. You can

Tab	Name	Value, description	Example
		notification disappears.	change the duration as per your requirement.
General	Auto-assign work items	Set to **Yes** to automatically assign the incoming conversation.	The default value is **No**. **Note:** This setting is in preview. More information: Enable automatic acceptance of conversations.
General	Auto-accept voice/chat calls	This option is displayed only if **Auto-assign work items** is enabled. Set to **Yes** for an agent to automatically accept a conversation.	The default value is **No**. **Note:** This setting is in preview. More information: Enable automatic acceptance of conversations.
General	Accept Button	Specify a text for the accept button. This text appears for the agents to accept a conversation request.	The default value is **Accept** that changes to **Open** when the **Auto-assign work items** value is **Yes**. You can change the text as per your requirement.
General	Reject Button	Set the toggle to yes if you want to show the reject button to agents. After you set the toggle to **Yes**, the default label for the button appears.	Reject **Note:** This is the default value. You can change the text as per your requirement. The **Reject Button** is disabled when the **Auto-assign work items** value is **Yes**.
General	Show desktop notifications	Specify **Always(preview)** to show notifications always or **When app is in background** to show notifications only if the Customer Service workspace or Omnichannel for	When app is in background **Note:** The default value is Never. To learn more, see Desktop notifications and Receive notifications when app is in background.

Tab	Name	Value, description	Example
		Customer Service is not in focus.	



4. Select **Save**. The template is saved, and the **Notification Fields** section appears on the page.

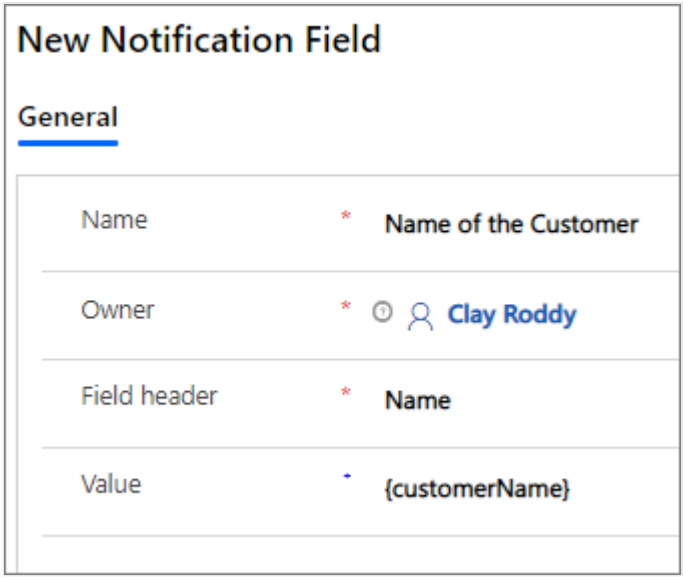
5. Select **Add Existing Notification Field** in the **Notification Fields** section. The **Lookup Records** pane appears.

6. Select the search icon in the **Look for Records** box. If no records are available, you will see a message: **No records found. Create a new record.**.

7. Select **New** to create a notification field. A confirm dialog box appears, asking whether you want to leave the page. Select **OK**.

8. Specify the following in the **New Notification Field** page.

Tab	Name	Value, description	Example
General	Name	Specify the name for the notification. This name won't be visible to the agents at the runtime.	Name of the customer
General	Field header	Provide a name to the field header. This appears in the notification that agents see at the runtime.	Name
General	Value	Provide a slug value that appears against **Field header** in the notification. To learn more, see Slug for notification field header.	{customerName}



9. Select the back arrow on the browser to go to the notification template you created. Alternatively, you can select **Notifications** in the sitemap, and then select the template you created.

10. Select **Add Existing Notification Field** in the **Notification Fields** section. The **Lookup Records** pane appears.

11. Select the name of the notification field you created, and then select **Add**. For example, **Name of the customer**.

12. Repeat steps 6 through 11 to add more notification fields.

13. Select **Save**.

After saving the notification, sign in to the Omnichannel for Customer Service app as an agent, and you can view the notification as per your configuration when a work item is routed.

To learn more, see View notification.

Edit a notification field

As an administrator, you can edit the value of a notification field header in the grid.

1. Select the notification you want to edit on the **Active Notifications** page.
2. Select a notification field you want to edit and then select the record to edit it.
3. Select the save icon in the grid.

Customize a notification

Let's see a scenario: In the Contoso Pvt Ltd customer service center, every case notification that is shown to an agent needs to have the following:

Title of the notification: A new case is assigned.

Notification fields:

- **Case priority:** Priority of the case such high or low.
- **Case title:** Title of the case.
- **Device:** Device from which the case was created by the customer.
- **Language:** Language of the customer.

As an administrator, you need to customize the notification template to show the title and notification fields.

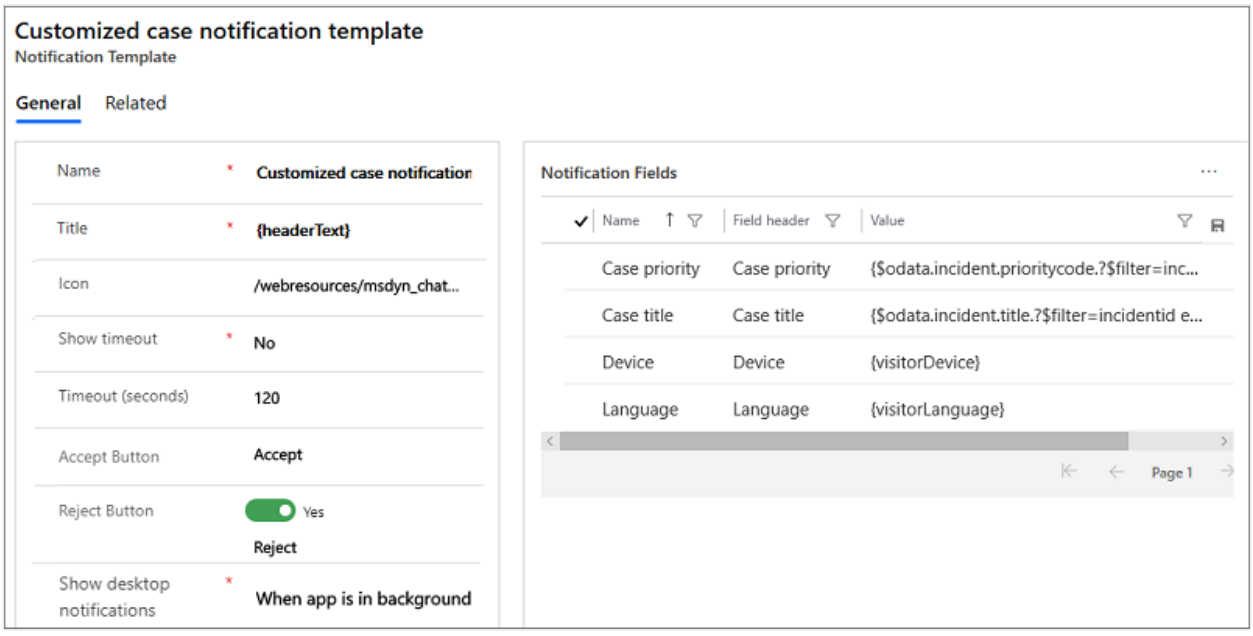
Step 1: Create a notification template with the following values

Tab	Name	Value
General	Name	Customized case notification template
General	Title	A new case is assigned
General	Icon	The default value is **/webresources/msdyn_chat_icon_zfp.svg**.
General	Show timeout	No

Tab	Name	Value
General	Timeout (seconds)	The default value is **120**.
General	Auto-assign work items	The default setting is **No**.
General	Accept Button	The default value is **Accept**.
General	Reject Button	The default value is **No**. When you set the toggle to **Yes**, the **Reject** label appears.
General	Show desktop notifications	The default setting is **Never**. Set to **When app is in background**.

Step 2: Create the notification fields with the following values

Name	Field header	Value
Case priority	Case priority	`{$odata.incident.prioritycode.?$filter=incidentid eq '{caseId}'&$select=prioritycode}`
Case title	Case title	`{$odata.incident.title.?$filter=incidentid eq '{caseId}'&$select=title}`
Device	Device	`{visitorDevice}`
Language	Language	`{visitorLanguage}`



Step 3: Save the changes

See also

Get started with Customer Service admin center
Manage session templates
Manage application tab templates
Associate templates with workstreams

Associate templates with workstreams

Article • 06/15/2022

The session, notification, and application tab templates that you create need to be associated with a workstream so that the Omnichannel system uses the corresponding templates for an incoming conversation.

After an agent accepts the conversation request, a session starts for which the session template is used. In the session, certain application tabs are required such as dashboard, knowledge article search, and case pages. These application tabs are configured using the application tab templates and are associated with a session.

Associate templates with workstreams in Omnichannel admin center

After you create a workstream, you can modify the default templates that are attached to the workstream.

Perform the following steps:

1. Go to the workstream for which you want to modify the template, and expand the **Advanced settings** section.
2. Select **Edit** beside **Sessions**, and on the **Sessions** panel that appears, select a template in the **Default template** list.
3. Select **Save and close**.
4. Select **Edit** beside **Agent notifications**, and on the **Agent notifications** panel that appears, select a template for each of the following types of notifications:
    - Incoming unauthenticated
    - Incoming authenticated
    - Consult
    - Transfer
    - Supervisor assign
5. Select **Save and close**.

Associate templates with workstreams in Omnichannel Administration

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

You can attach only generic type of templates to work streams. By default, the out-of-the-box templates are associated based on the channel. However, you can replace the default templates with the ones that you create.

1. Sign in to the Omnichannel Administration app.
2. Select **Work Streams** under **Work Distribution Management**.
3. Select a work stream for which you want to associate the templates.
4. Select the **Templates** tab in the work stream. You can see the **Sessions** and **Notifications** sections.
5. You can accept the default session template or select the search icon in **Look for Session Templates**.
6. In the list of templates that you created, select a template.
7. In the **Notifications** section, for each of the following fields, you can accept the default notification template or select the search icon in **Look for Notification Templates**, and select a template.
    - Incoming authenticated
    - Incoming unauthenticated
    - Consult
    - Transfer
    - Supervisor Assign
8. Select **Save** to save the changes to the work stream.

See also

Manage session templates
Manage application tab templates
Manage notification templates

Overview of productivity tools

Article • 04/05/2023

The Dynamics 365 Productivity Tools app provides capabilities that help users perform day-to-day operations in a fast, efficient, and process-compliant manner and deliver value to customers.

The Dynamics 365 Productivity Tools app contains the following functionality to help with repetitive and monotonous tasks, such as greet customers and fill forms. The tool also helps with displaying AI-based suggestions for knowledge articles and similar cases to agents, and thereby helps users perform day-to-day operations in a fast, efficient, and process-compliant manner.

> **Note**
>
> The productivity pane and productivity tools are not available in Omnichannel for Customer Service on Unified Service Desk.

Macros

With macros, agents can perform repetitive, monotonous tasks—Open model-driven app forms, pre-populate fields with details, send an email to a customer, take notes, and much more—all in a single click. A macro is a set of sequential actions that tells the system how to complete a task. When an agent runs a macro, the system performs each action, and this helps save time and gives agents the freedom to handle more customer issues. Also, macros provide preciseness, clarity, and consistency to the tasks that agents perform.

Agent scripts

Agent scripts provide guidance to agents about what to do when they get a customer issue. The scripts ensure that only accurate, company-endorsed information is being shared, while also safeguarding the organization in regard to legal-compliance issues. Agent scripts help organizations to be unified, accurate, and effective while being quick and efficient in handling customer needs.

Smart assist

Smart assist is an intelligent assistant that provides real-time recommendations to agents, helping them take actions while interacting with customers. You can use the AI-based suggestions for knowledge articles and similar cases by enabling the feature. You can also build a custom bot to interpret the conversation context and provide suggestions to agents. These recommendation cards are displayed on the agent user interface based on the context of the current conversation.

The smart assist feature can be enabled across all channels like Chat for Dynamics 365 Customer Service, SMS, and Facebook, except entity records, making it a consistent experience for agents.

Microsoft Teams

Microsoft Teams is a tool that can help agents more easily collaborate with colleagues by using the capabilities of Teams within Dynamics 365. Agents can view their chats, and with admin setup, can view chats that are relevant to certain records, also known as connected chats. Connecting all of their chats in one place helps agents work without switching context or leaving the application. Admins can also configure an optional introduction note that agents can use to provide further context when collaborating on Teams.

Custom productivity tools (preview)

The productivity pane supports custom productivity tools developed as custom pages or Power Apps component framework controls. You can create multiple custom productivity tools and make them available to your users with agent experience profiles.

See also

Macros
Agent scripts
Smart assist
Microsoft Teams

Manage smart assist

Article • 06/09/2023

The new-age customer service industry is moving toward the vision of being intelligent rather than process-driven while interacting with customers. Pivoting on intelligence capabilities helps unleash the productivity of agents to perform better on key performance indicators and—at the same time—deliver better customer experience.

Smart assist is an intelligent assistant that provides real-time recommendations to agents, helping them take actions while interacting with customers. It allows organizations to build a custom bot and plug-in to their environment. These custom bots interpret conversations in real time and provide relevant recommendations such as knowledge articles, similar cases, and next-best steps to the agent's user interface.

The smart assist feature can be enabled across all channels, such as Chat for Dynamics 365 Customer Service, SMS, and Facebook (excluding Entity Records Channel), making it a consistent experience for agents.

> **ⓘ Important**
>
> The smart assist recommendations are displayed only after the agent sends a message.

Value proposition

- Contextual recommendations are generated based on real-time conversations.
- Plug-in organization-specific recommendations are displayed to agents in real time.
- Action-oriented recommendations are displayed for agents to send responses or run automated actions.
- Intelligence is powered by using Microsoft Azure or third-party capabilities.
- Agents can achieve improved average handling time and first call resolution.

Prerequisites

- Productivity pane must be enabled. Out of the box, productivity pane is enabled by default.

- Smart assist must be enabled.
- One of the following:
  - AI-suggested similar cases and knowledge articles should be enabled by your administrator.
  - Develop a smart assist bot and integrate it with Omnichannel for Customer Service. The smart-assist bot interprets the conversation context in real time and provides suggestions to agents. For information: Build a smart assist bot using Azure Bot Service.

> **Note**
>
> Power Virtual Agents bots aren't supported as smart assist bots.

Enable AI suggestions for similar cases and knowledge articles

To enable AI-suggested similar cases and knowledge articles, see Enable AI suggestions for similar cases and knowledge articles.

Enable smart assist for the bot framework in Omnichannel for Customer Service

To enable smart assist for the bot framework in Omnichannel for Customer Service, perform the following steps:

1. Create a bot user
2. Add smart assist bot to a workstream

Create a bot user

Create a bot user in the application to work as a smart assistant to the agent. A bot user is created as an application user and assigned the **Omnichannel agent** role. If your bot needs to search for knowledge base articles, then you need to provide either the **Customer Service Manager** or **Customer Service Representative** role.

You can create an application user only in the web client. Use the bot application ID of the smart assist bot to create the bot user. More information: Create a bot user

Add a smart assist bot to a workstream

After you create a bot user, you need to add the bot to the workstream so that agents who use the channel of this workstream can see the suggestions.

1. In Customer Service admin center, go to **Workstreams** in **Customer support**, and select the workstream in which you want to add the smart assist bot.
2. Expand **Advanced settings**, and select **Add bot** in the **Smart Assist bots** area.
3. In the **Add from existing** panel, select a bot user from the list, and then select **Add**.

You can add multiple bots to a workstream based on your business requirements.

Region availability and language support

To learn about the regions and supported languages, see Supported regions and languages.

See also

Macros
Agent scripts

Guide agents with scripts

Article • 06/09/2022

In the customer service industry, agents need to deal with continuous updates both to products and processes. Even after agents have been rigorously trained, recurrent human errors and delays in service delivery occur due to a lack of guidance in real-time customer scenarios. These issues lead to lower productivity and thus negatively affect customer satisfaction levels. To avoid errors and ensure that processes are adhered to, agents need guidance.

Agent scripts provide guidance to agents about what to do when they get a customer issue. The scripts ensure that only accurate, company-endorsed information is being shared, while also safeguarding the organization in regard to issues of legal compliance. Agent scripts help organizations to be unified, accurate, and effective while also being faster and more efficient in terms of customer handling.

Agent scripts reduce the human errors involved, because agents know which actions they need to perform next while they interact with a customer, enabling agents to adhere to the business process. This, in turn, leads agents to provide quick resolutions for the issue (low average handling time) and improve customer satisfaction.

Value propositions

- Minimization of human errors
- Adherence to business processes
- Lower average handling time
- Improved customer satisfaction

Prerequisites

- Ensure that you have the **Productivity tools administrator** security role. To learn more, see Assign roles and enable users.
- Ensure that agents and supervisors are assigned the **Productivity tools user** security role. To learn more, see Assign roles and enable users.

Create agent scripts

Create agent scripts in the Customer Service admin center, Omnichannel admin center, Omnichannel Administration, or Customer Service Hub app. The following procedure is

an example of an agent script for a chat session. You can modify the procedure for other types of sessions your agents are likely to come across.

1. Sign in to Power Apps, and go to the app profile manager page.
2. In the left pane, under **Productivity**, select **Agent scripts**. The Unified Interface page opens on a new tab.
3. On the page that appears, select **New**.
4. On the **New Agent script** page, specify the following:

Field	Description	Value
Name	A name for the agent script.	Chat session script
Unique Name	A unique identifier in the *<prefix>_<name>* format. **Important:** The following are required for the unique name: • The prefix can only be alphanumeric and its length must be between 3 to 8 characters. • An underscore must be there between the prefix and name.	Contoso_script
Language	A language from the list. The languages that are enabled in Microsoft Dataverse appear in the list.	English
Description	Description for the agent script.	This agent script is used for chat sessions.

5. Select **Save**. The **Agent script steps** appears.
6. In the **Agent script steps** section, select **New Agent script step**. **Quick Create: Agent script step** appears.
7. Specify the following fields in the quick-create form.

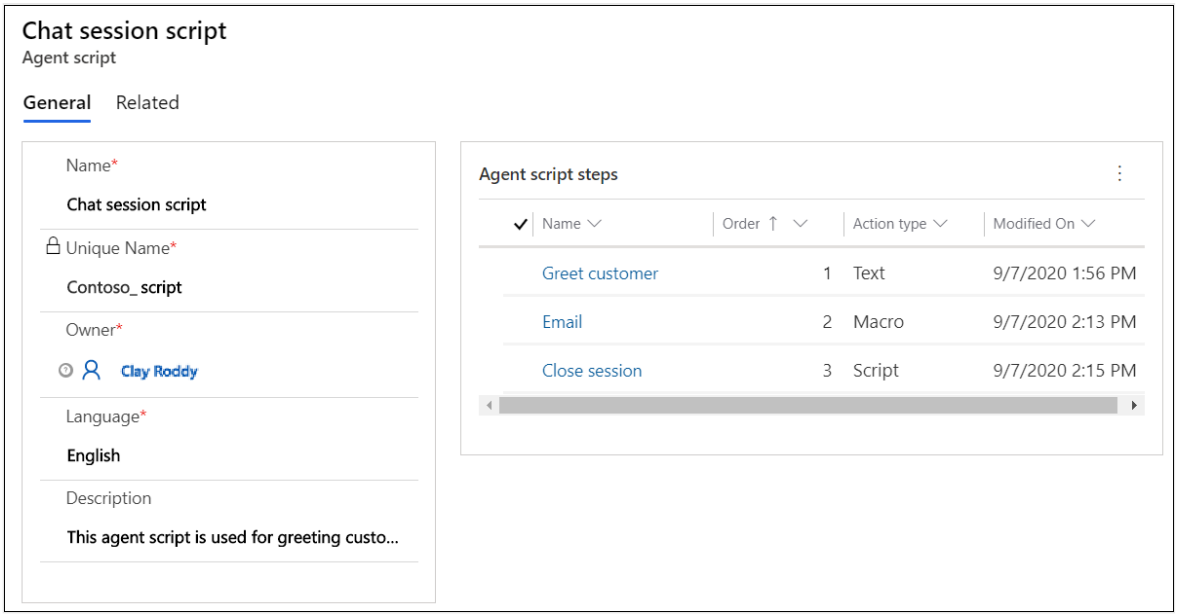
Field	Description	Example Value
Name	Provide a name for the agent script step; this appears for the agent at runtime. You can use slugs for specifying the name of the step. To learn more, see Slugs.	Example 1: Greet the customer. Example 2: Hi {customer}

Field	Description	Example Value
Unique Name	A unique identifier in the <*prefix*>_<*name*> format. **Important:** The following are required for the unique name: • The prefix can only be alphanumeric and its length must be between 3 to 8 characters. • An underscore must be there between the prefix and name.	Greet_script
Owner	By default, the signed in user is displayed as the owner.	Clay Roddy
Agent script	The agent script for which the script step is being created.	Chat session script
Order	Specify the order number based on which step is displayed to the agent.	1
Action Type	Select an action type from the list: • Text instruction • Macro • Script	
Description	Describe the step briefly for your reference.	This step opens a draft email to send the customer links to knowledge articles. **Note:** This field appears only when you select the **Action Type** value as **Target Macro** or **Target script**.
Text instruction	Specify the text instructions the agent needs to follow and execute. This is a text field. Additionally, you can pass parameter values by using the slugs and OData queries. More information: Pass parameter values **Note:** This field appears only if you select the **Text** value for the **Action Type** field.	Greet the customer with the welcome message from the quick reply repository.

Field	Description	Example Value
Target macro	Type the name of the configured macro in the text box, and then select the macro from the lookup results. **Note:** This field appears only if you select the **Macro** value for the **Action Type** field.	Email
Target script	Type the name of the configured script in the text box, and then select the script from the lookup results. **Note:** This field appears only if you select the **Script** value for the **Action Type** field.	Close the session

8. Select **Save and Close** to add, save, and close the quick-create form.

9. Select **Save** to save the changes.



The agent script is now configured.

Associate an agent script with a session template

After you configure the agent script and add the field to a form, you need to associate the agent script with a session template so that the agent script will load for agents based on the type of session they've opened.

1. Select one of the following apps, and perform the steps.

   Customer Service admin center

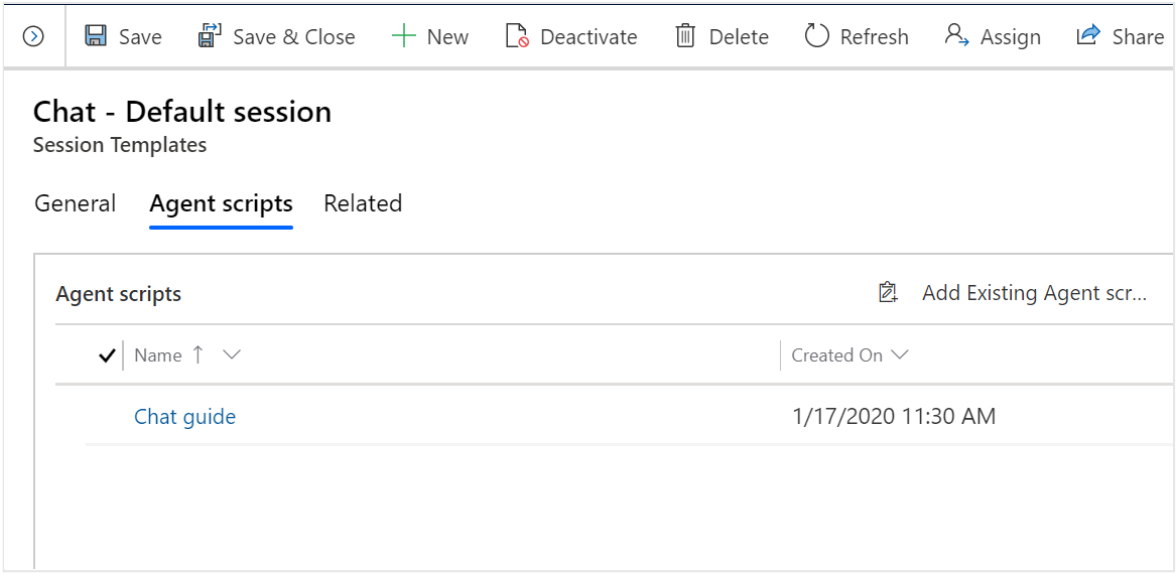
   In the site map, select **Session templates** in **Workspaces**.

2. Select a template from the list for which you want to associate the template. For example, select the **Chat - Default Session** template.

3. Select the **Agent scripts** tab.

4. In the **Agent scripts** section, select **Add Existing Agent script**. The **Lookup Records** pane appears.

5. In the **Look for Records** box, select the search icon. Select the agent script from the list, and then select **Add**.



6. Select **Save**.

The agent script is associated with the session template.

Set the default agent script for agents

As an administrator, you can set different default agent scripts for agents who handle different services, customers, or products. You need a way to show these agents a script that's appropriate for the context of the conversation between them and the customer. With the agent script expression builder, you can define the conditions that define which script an agent is shown by default in Omnichannel for Customer Service.

Based on these conditions, when an agent accepts an incoming conversation, the agent script control selects a script from the different scripts that were made available for that particular session type and shows the script to the agent. In addition, agents can manually select a script from the list of available agent scripts if they need to switch between different scripts.

Enable and build the expression

You can build the expression in the **Agent scripts** tab in the sessions template.

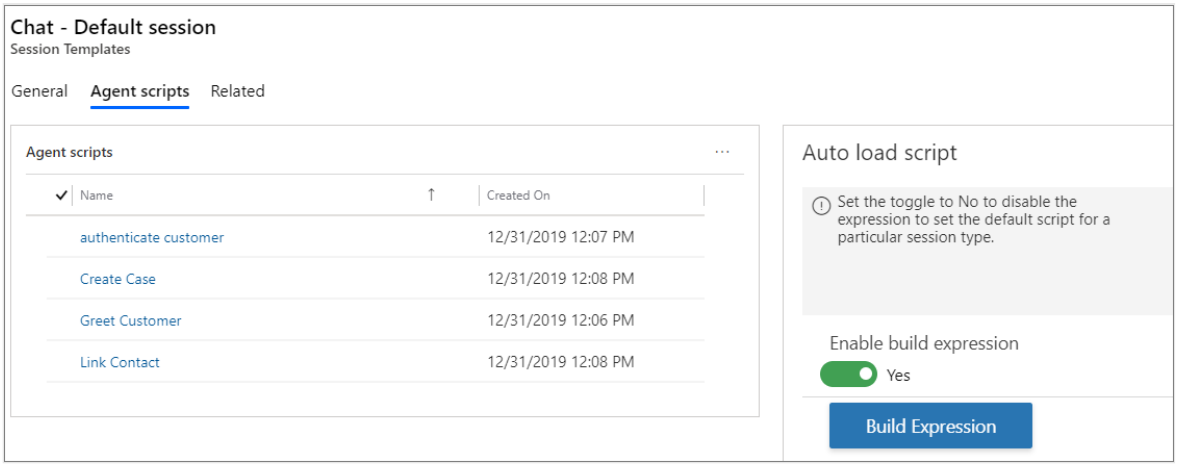
1. Select one of the following appss, and perform the steps.

   Customer Service admin center

   In the site map, select **Session templates** in **Workspaces**.

2. Go to the **Agent scripts** tab.

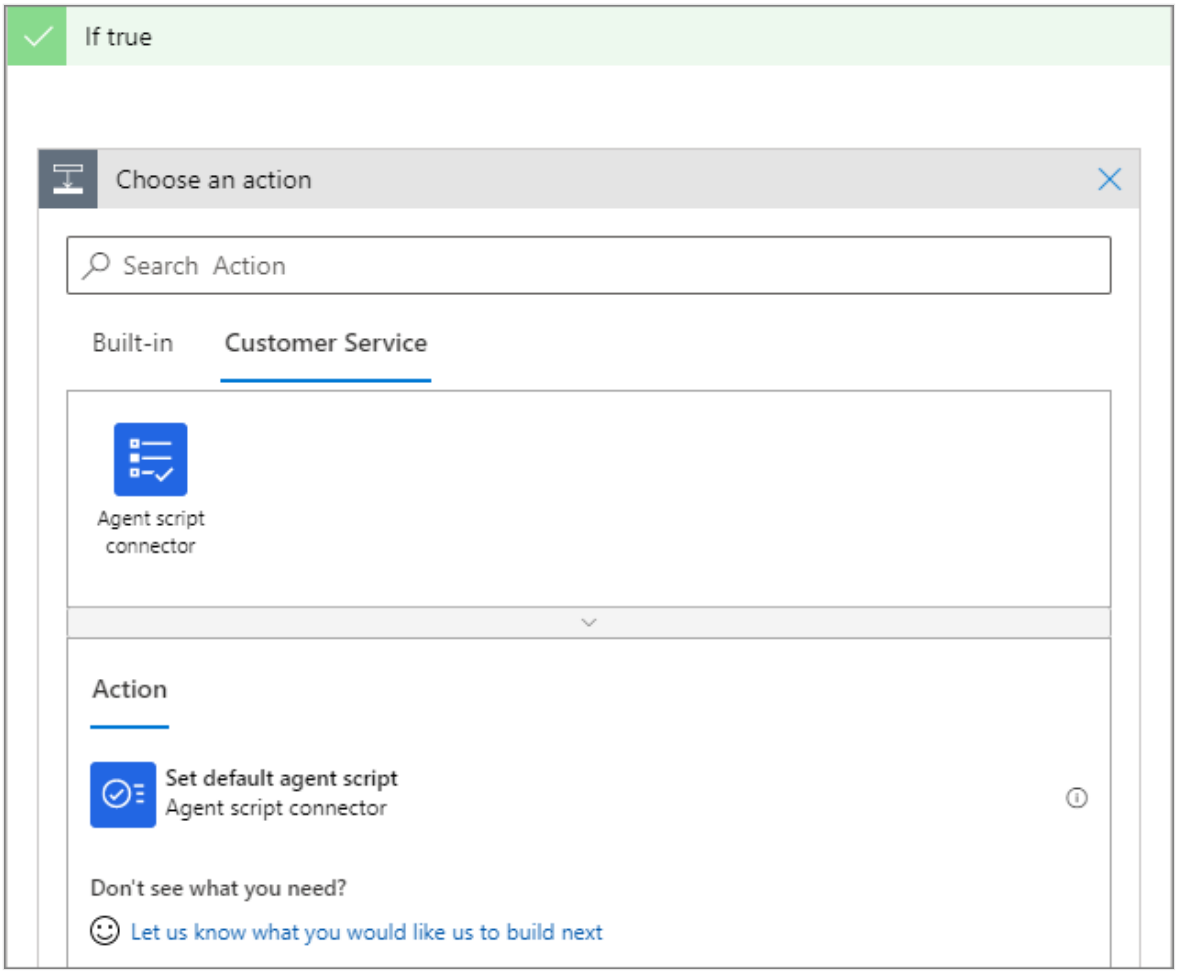
3. Set the **Enable build expression** toggle to **Yes**, and then select **Build Expression** to define the expression. The **Expression builder** page is displayed.



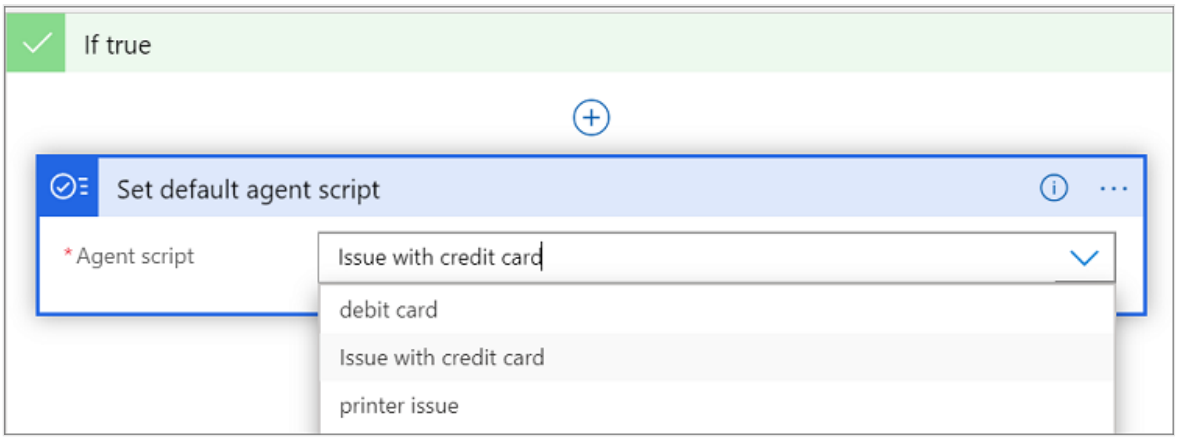
4. Select the **Condition** step, and then create the condition.

5. In the **If true** step, select **Add an action**. The **Condition** step is displayed. To learn about conditions, see Use the automation dictionary to pass context data parameters.

6. Select the **Customer Service** tab, and then select **Set default agent script**.



7. Select a script from the **Agent script** list.



8. Follow steps 4 through 7 for the **If false** step.

9. Select **Save and close** to save the expression and close the builder.

Now, you've built the expression.

Use the automation dictionary to pass context data parameters

As an administrator, you need to configure the condition by using the automation dictionary based on the evaluation of the condition. A script is set as default, and this script is displayed to the agent at runtime.

The automation dictionary provides you certain data parameter keys that you can use to build your condition. These parameter keys are resolved and replaced by contextual values at runtime.

To learn about the slugs for productivity tools, see Slugs.

To learn more, see Use the automation dictionary to pass data parameter keys.

See also

Agent scripts
Macros
Smart assist
Session templates

Automate tasks with macros

Article • 06/16/2023

In the customer service industry, agents have to click often to perform simple tasks, such as open a form, fill, and save it, and many repetitive and monotonous actions, such as greeting and verifying a customer, sending acknowledgment mail, and taking notes. These clicks and repetitive tasks can lead to human errors when agents copy and paste the data across different operations.

Macros are a set of sequential actions that are performed by a user. They enable users to perform daily operations efficiently in a fast and process-compliant manner. You can reuse macros with different sessions based on the context parameters that are specific to the session.

The value propositions of the macros are as follows:

- Automate repetitive and monotonous tasks with a single click.
- Minimize human errors.
- Adhere to business processes.
- Lower average handling time.
- Improve customer satisfaction.
- Create contextual and reusable macros.

The macros in Customer Service workspace have the following:

- Predefined automation actions
- Built-in control

Prerequisites

- Install Dynamics 365 Productivity Tools solution.
- Ensure that you have the **Productivity tools administrator** security role. More information: Assign roles and enable users
- Ensure that agents and supervisors are assigned the **Productivity tools user** security role. More information: Assign roles and enable users

Predefined automation actions

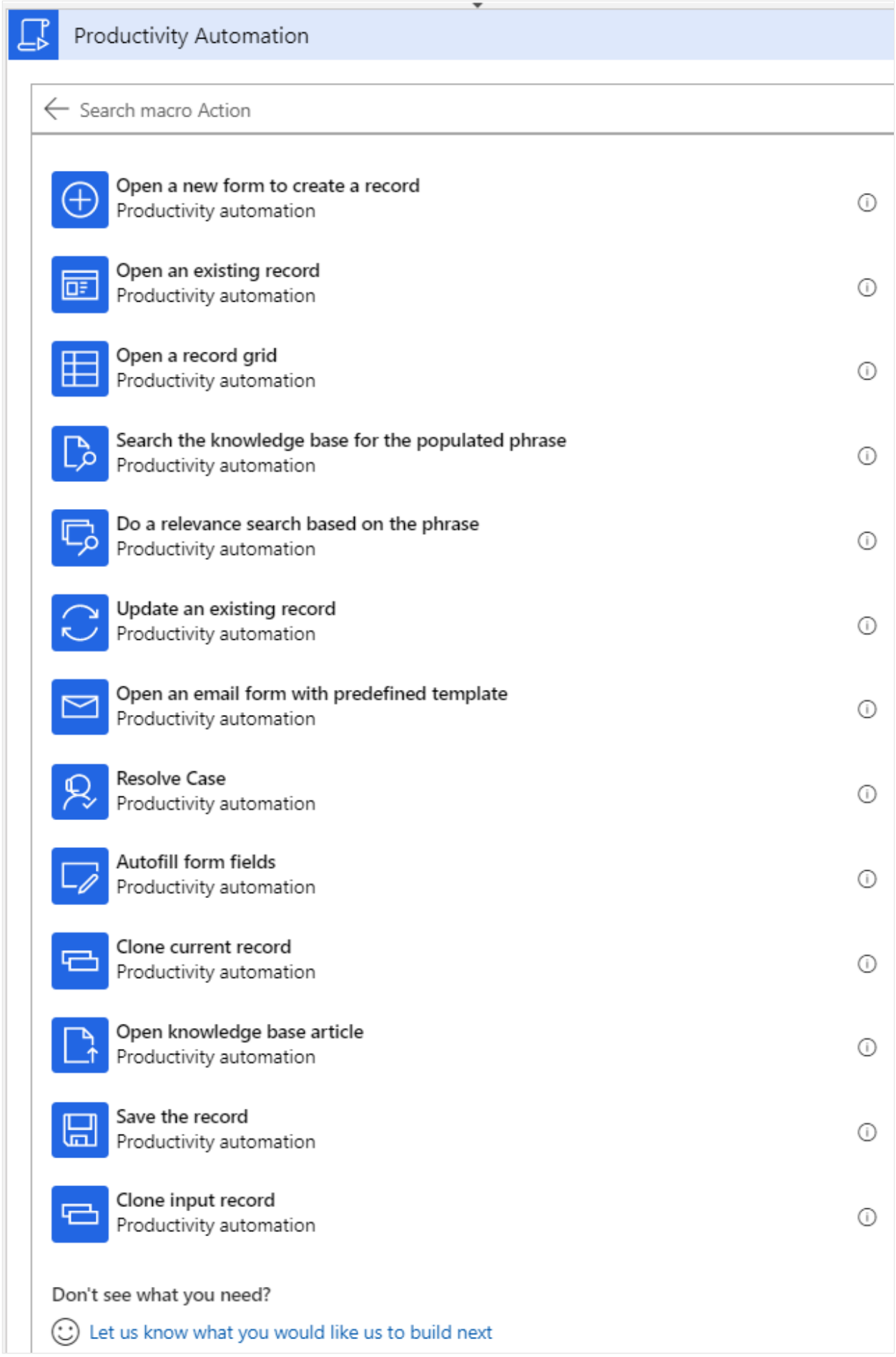
In Customer Service, macros provide three connectors:

- Productivity automation: Provides actions to perform model-driven app operations.
- Session connector: Provides actions to perform session-related operations.
- Omnichannel connector: Provides actions to perform Omnichannel for Customer Service–related operations.

Productivity automation

As an administrator, you can use the actions any number of times across different macros to automate and perform model-driven app operations.

The following screenshot shows the actions that are explained in the subsequent sections.



Open a new form to create a record

This action is used to open a new form to create a record. The action contains the following fields.

Field	Description	Parameter
Entity logical name	Specify the logical name of the entity that you want to open. This is a mandatory field.	incident
Entity form ID	Specify the form ID. This is an optional field.	
Attribute Name	Specify the attribute logical name. You need to provide the attribute name to prepopulate the field with a value.	
Attribute Value	Specify the attribute value. You need to provide the attribute value to prepopulate the attribute field.	

Open an existing record

This action is used to open an existing record form. The action contains the following fields.

Field	Description	Parameter
Entity logical name	Specify the logical name of the entity that you want to open. This is a mandatory field.	incident
Entity record ID	Specify the entity record ID. This is a mandatory field.	
Entity form ID	Specify the form ID. This is an optional field.	

Open a record grid

This action is used to open a record grid. The action contains the following fields.

Field	Description	Parameter
Entity logical name	Specify the logical name of the entity for which you want to open the grid. This is a mandatory field.	incident
View ID	Specify the ID of the view that you want to open. This is a mandatory field.	

Field	Description	Parameter
View type	Specify the view type. This is a mandatory field.	

Search the knowledge base for the populated phrase

This action is used for searching knowledge articles based on the populated phrase. The action contains the following field.

Field	Description	Parameter
Search string	Provide the phrase based on which you want to search for knowledge articles. You can provide the context data. For example, the context data parameter can be a case title.	
Tab Label	Specify the tab label.	

Do a relevance search based on the phrase

This action is used for searching knowledge articles based on the populated phrase. The action contains the following field.

Field	Description	Parameter
Search string	Provide the phrase based on which you want to do a relevance search. You can provide the context data. For example, the context data parameter can be a case title. This is a mandatory field.	

Update an existing record

This action is used to update an existing record. The action contains the following fields.

Field	Description	Parameter
Entity logical name	Specify the logical name of the entity that you want to update. This is a mandatory field.	incident
Entity record ID	Specify the entity record ID. This is a mandatory field.	

Field	Description	Parameter
Attribute Name	Specify the attribute logical name you want to update.	
Attribute Value	Specify the attribute value that will be updated for the above-mentioned attribute.	

Set Agent Script focus

This action is used to set the focus on an agent script that needs to run next. The agent script will be set in focus in the **Agent scripts** dropdown on the app side pane. For example, if the agent needs to process a refund complaint. The agent will use different scripts to greet, initiate a complaint request, and process the refund. You can define macros that will set the focus on the agent scripts that need to be run for each stage of the refund process. The action contains the following field.

Field	Description	Parameter
Agent Script Unique Name	Specify the agent script that needs to be in focus.	The unique name of the agent script.

Open an email form with predefined template

This action is used to open an email with a predefined template. The action contains the following fields.

Field	Description	Parameter
Entity logical name	Specify the logical name of the entity. This is a mandatory field.	incident
Entity record ID	Specify the entity record ID. This is a mandatory field.	
Email recipients	Specify the recipients to whom you want the mail to be sent. This is a mandatory field.	
Template ID	Specify the ID of the template that must displayed in the email. This is a mandatory field.	

Resolve a case

This action is used to resolve a case. The action contains the following fields.

Field	Description	Parameter
Billable time	Specify the time that is billable. This is a mandatory field.	incident
Incident ID	Specify the ID of the case that you want to close. This is a mandatory field.	
Resolution	Specify the reason to resolve the case. This is a mandatory field.	

Autofill form fields

This action is used for updating the form attribute (field). The action updates the attribute of a form if that form is currently in focus and has the same entity type as mentioned in action. If the action is run for any other entity, then the action will fail. Also, the action only updates the field and doesn't save the record. The action contains the following field.

Field	Description	Parameter
Entity logical name	Specify the logical name of the entity that you want to update. This is a mandatory field.	incident

Clone current record

This action is used for cloning an existing record that is open in the current tab. The action only copies the fields and does not save the record. The action contains the following field.

Field	Description	Parameter
Record title	Specify the title of the record that you want to clone. This is a mandatory field.	

Open knowledge base article

This action is used to open the knowledge base article. The action contains the following field.

Field	Description	Parameter

Field	Description	Parameter
Entity record ID	Specify the entity ID of the knowledge base article that you want to open. This is a mandatory field.	

Save the record

This action saves the record after you've entered data in all the mandatory fields. The action fails if the mandatory fields aren't entered or are left blank.

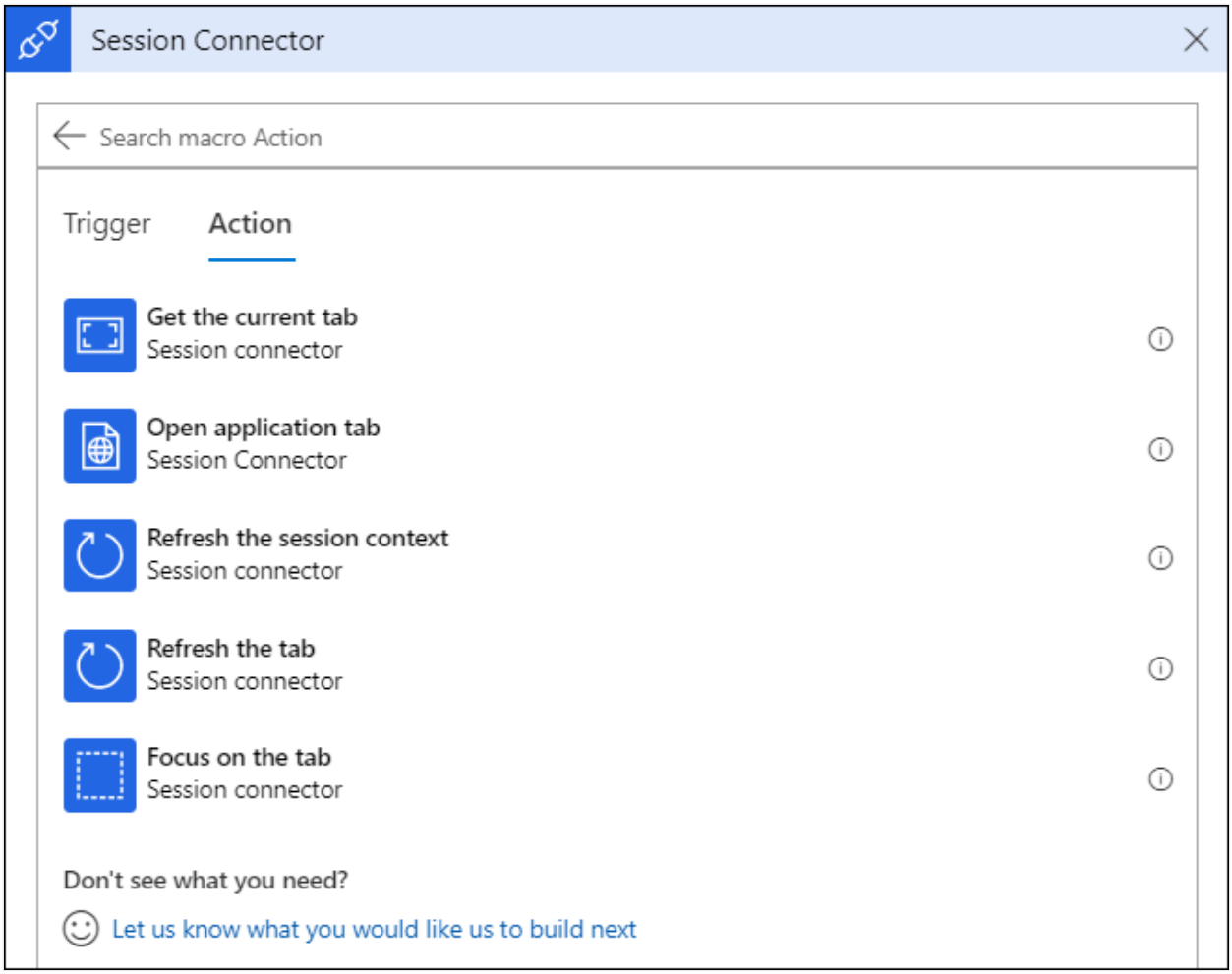
Clone input record

This action clones an existing record. The action only copies the fields and does not save the record. The action contains the following fields.

Field	Description	Parameter
Entity logical name	Specify the logical name of the entity that you want to clone. This is a mandatory field.	
Entity record ID	Specify the ID of the entity record. This is a mandatory field.	
Record title	Specify the record title.	

Session connector

As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to a session in Customer Service workspace.



Get the current tab

This action gets the details of the current tab in Omnichannel for Customer Service. The action retrieves the Tab ID that could be used in the **Refresh tab** and **Focus tab** actions.

Open application tab

This action opens the specified application in a new tab with the attributes that you define. The action contains the following fields.

Field	Description	Parameter
Page type	Specify the application type to be opened. More information: Page types This is a mandatory field.	
Application Template ID	Specify the ID of the application template. This is a mandatory field.	
Attribute Name	Specify the attribute logical name you want to update.	
Attribute Value	Specify the attribute value that will be updated for the above-mentioned attribute.	

Refresh the session context

This action refreshes the session context in Customer Service workspace for entity sessions. For example, if you launch an entity session for a case record, the session context variables will be defined when the session starts. However, if you update the case title, the session context will not be updated. Therefore, macros will use the cached information. You can add the **Refresh the session context** step after starting the macro run to use the latest information.

Refresh the tab

This action refreshes a tab in the Customer Service workspace session. This action contains the following field.

Field	Description	Parameter
Tab ID	Specify the ID of the tab that you want to refresh. This is a mandatory field.	

Focus on the tab

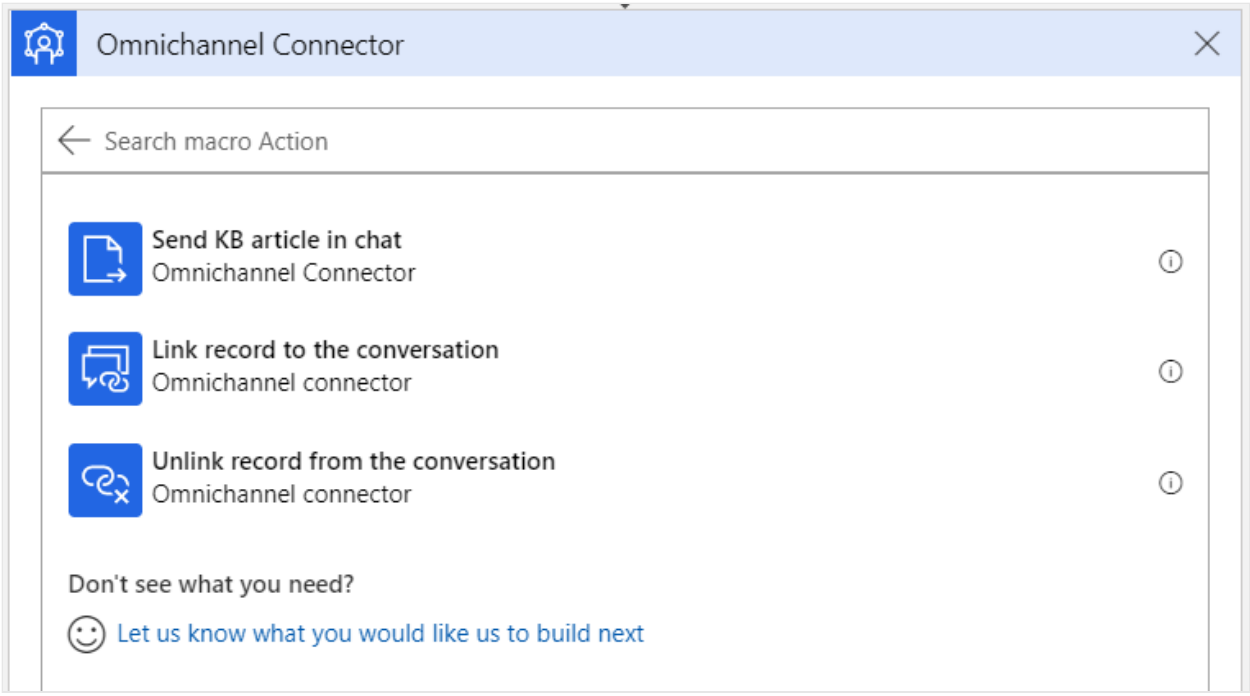
This action focuses on a tab in the Customer Service workspace session. This action contains the following field.

Field	Description	Parameter
Tab ID	Specify the identifier of the tab that you want to give focus to. This is a mandatory field.	

Omnichannel connector

As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to Omnichannel for Customer Service.

> **Note**
>
> Macro actions for the Omnichannel connector is available if Customer Service workspace in Omnichannel for Customer Service is installed.



Send knowledge base article link in chat

This action sends a knowledge base article link to the conversation chat window. It must be used with the **Search knowledge base for the populated phrase** action. Make sure that your admin has switched the **Use an external portal** toggle to **Yes**. More information: Set up knowledge management

The action contains the following field.

Field	Description	Parameter
Entity record ID	Specify the ID of the entity record. This is a mandatory field.	

Link record to the conversation

This action links a record to the conversation when the customer is communicating with the agent in the Omnichannel for Customer Service session. This action contains the following fields.

Field	Description	Parameter
Entity Logical Name	Specify the logical name of the entity that you want to link. This is a mandatory field.	incident
Entity record id	Specify the entity record ID of the entity that you want to link. This is a mandatory field.	

Field	Description	Parameter
Entity primary Name	Specify the primary name of the entity that you want to link. This is a mandatory field.	

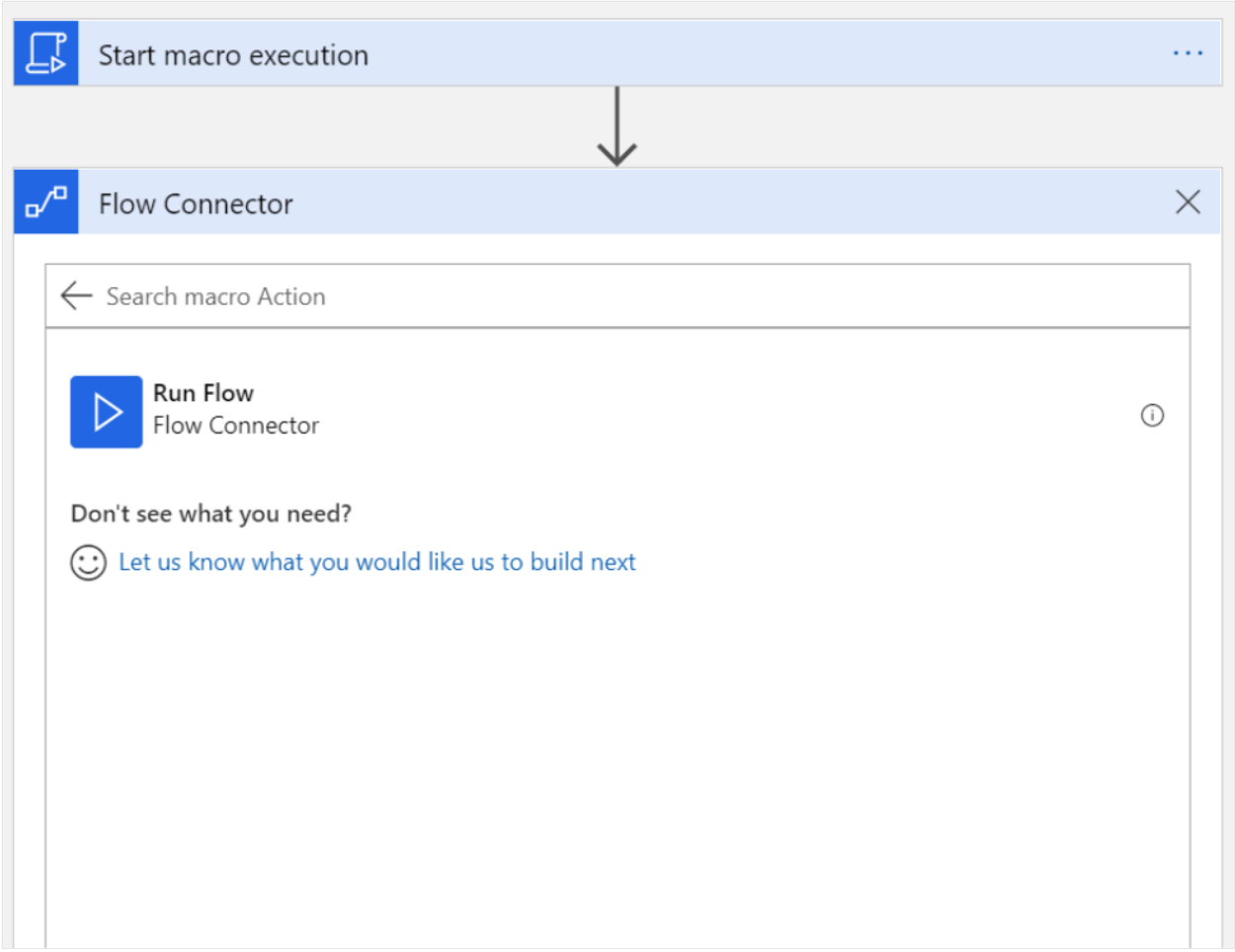
Unlink record from the conversation

This action unlinks a record from the conversation when the customer is communicating with the agent in the Omnichannel for Customer Service session. This action contains the following fields.

Field	Description	Parameter
Entity Logical Name	Specify the logical name of the entity that you want to unlink. This is a mandatory field.	incident
Entity record id	Specify the entity record ID of the entity that you want to unlink. This is a mandatory field.	
Entity primary Name	Specify the primary name of the entity that you want to unlink. This is a mandatory field.	

Flow connector

As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to Omnichannel for Customer Service and Customer Service workspace.



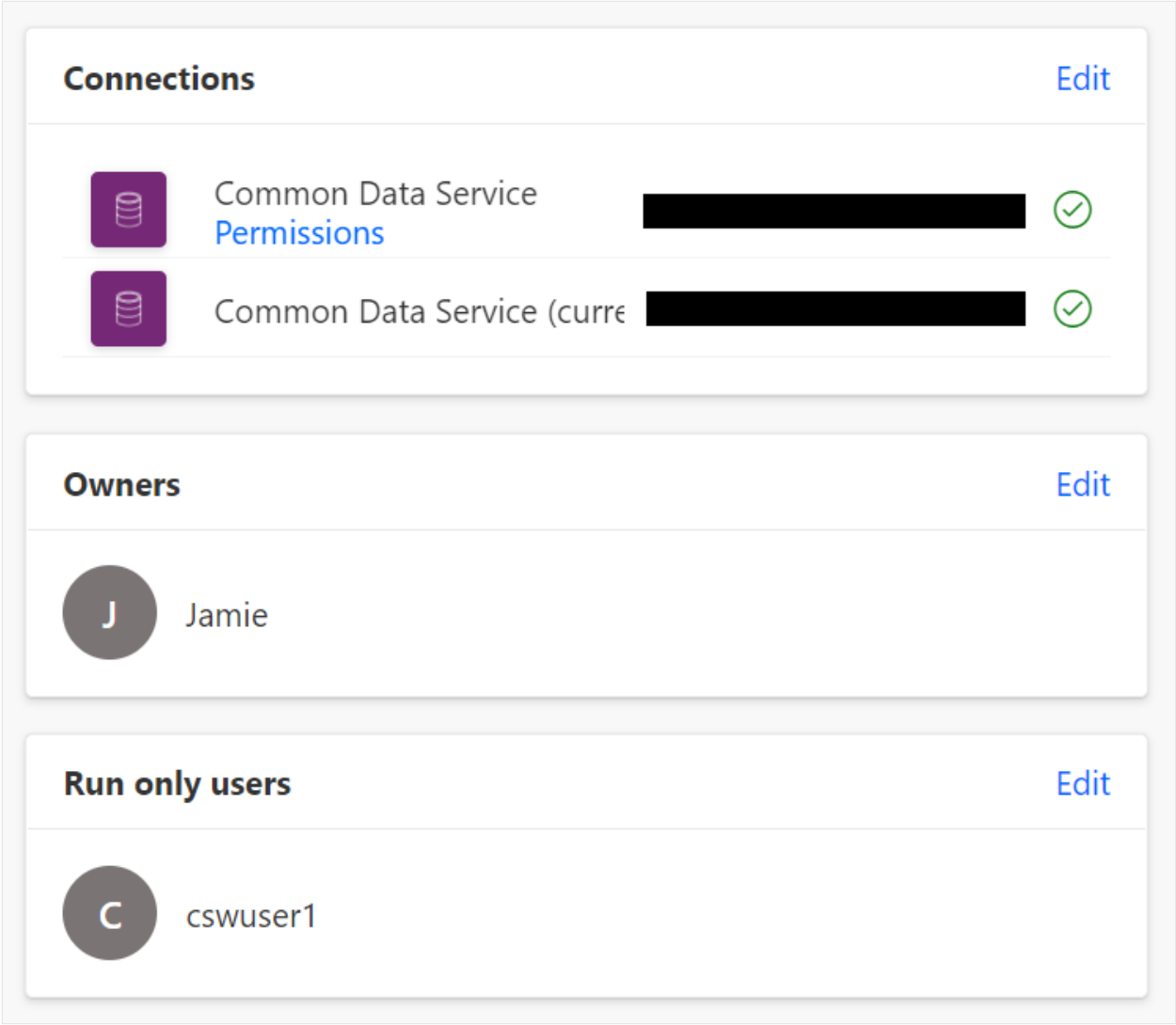
Run Flow

This action triggers Power Automate flows using macros in agent scripts. This action contains the following fields.

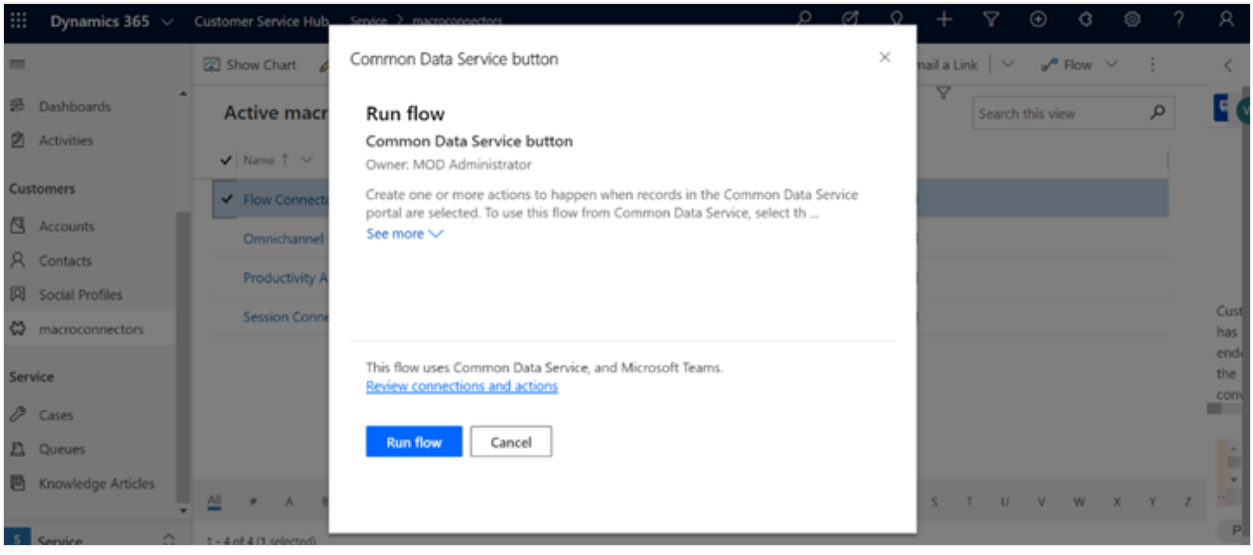
Field	Description	Parameter
Entity logical name	Specify the logical name of the entity that you want to link. This is a mandatory field. Any Microsoft Dataverse entity, such as Account, can be used based on business needs.	account
Entity record id	Specify the entity record ID of the entity that you want to link. This is a mandatory field. Ids or slugs, such as {customerRecordId}, can be used. While this field is labeled as entity record id, any value to be processed can be passed. While the field is required, values do not have to be functional unless required for the flow logic.	{customerRecordId}
Select flow	Specify or select the Power Automate flow to be run by this action. Requires instant cloud flows with *When a record is selected* flow triggers. Existing flows with proper permissions will be detected and displayed in the drop-down list.	

Power Automate flow permissions

Referenced flows require valid connection and run permissions for the Omnichannel for Customer Service and Customer Service workspace tenant and agents that run the flow from within agent scripts.

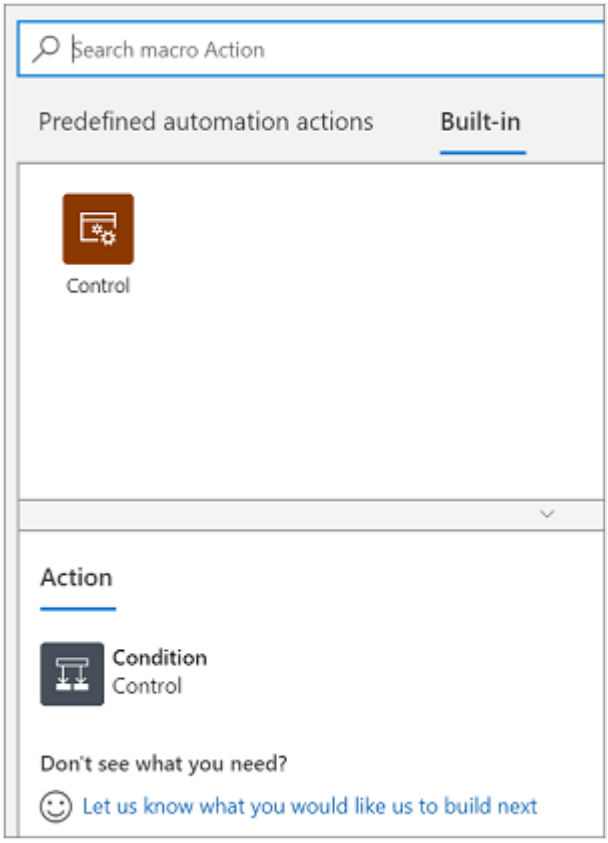


When you run the **Run flow** action, flows are run within the embedded flow widget on Omnichannel for Customer Service.



Built-in

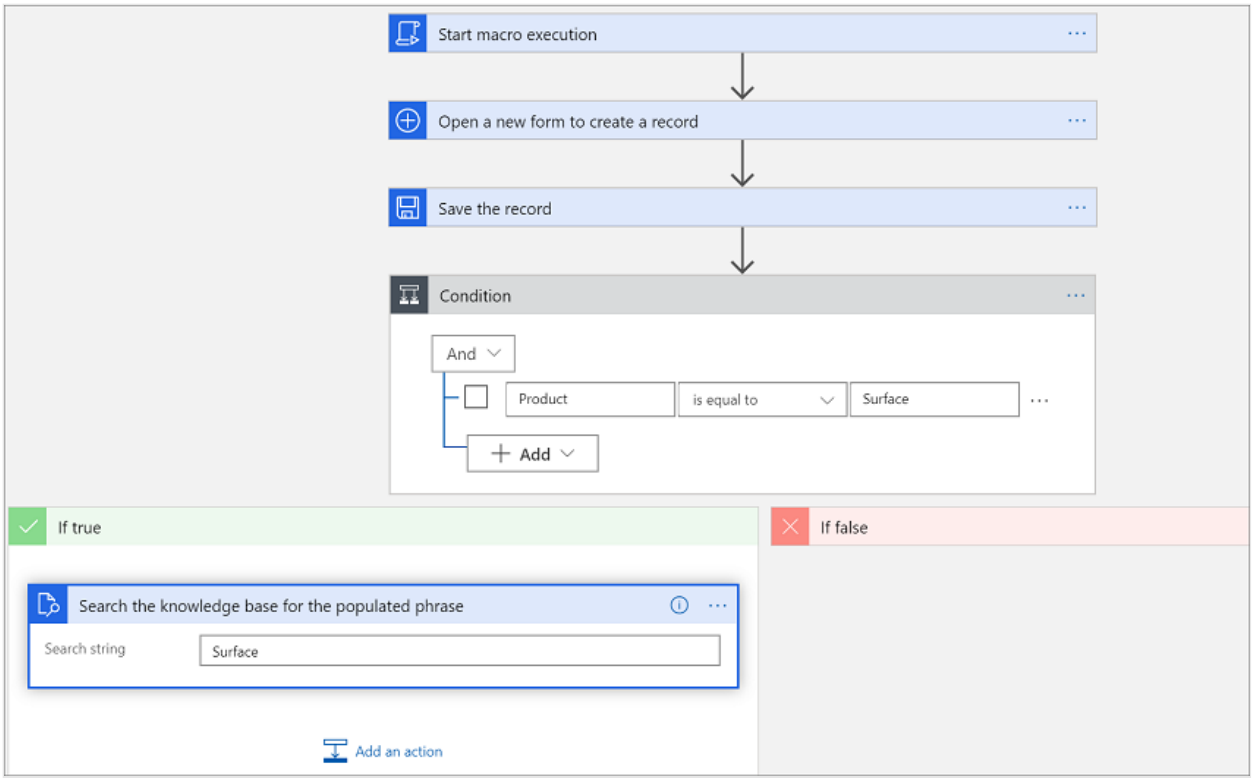
The Built-in control allows you to run a macro action step based on the conditions. The **Built-in** category connector has a **Condition** action.



To use the **Built-in** category, you first need to have a trigger (predefined automation actions). That is, select a predefined automation action first, and before or after a step, you can define the condition. You can also create nested conditions as per your requirements.

Using the **View run history** option for a particular macro, you can see the condition that was run and whether it succeeded.

For example, you want to open a new form and save it after entering the fields. If the **Product** field in the form has **Surface** as the value, evaluate it as true and then perform the knowledge base article search with the search phrase as **Surface**. If it is evaluated as false, don't perform any further actions.



Use the automation dictionary to pass macro context data parameters

Macros are a set of configured actions that are run on demand by users. As an administrator, you need to configure the actions that a macro must perform. To configure the actions, you need to provide certain data parameters keys. When an agent runs the macro, these data parameters keys are replaced by contextual values.

To learn about the slugs for productivity tools, see Slugs.

To learn more, see Use automation dictionary to pass data parameter keys.

Create a macro

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Productivity**.

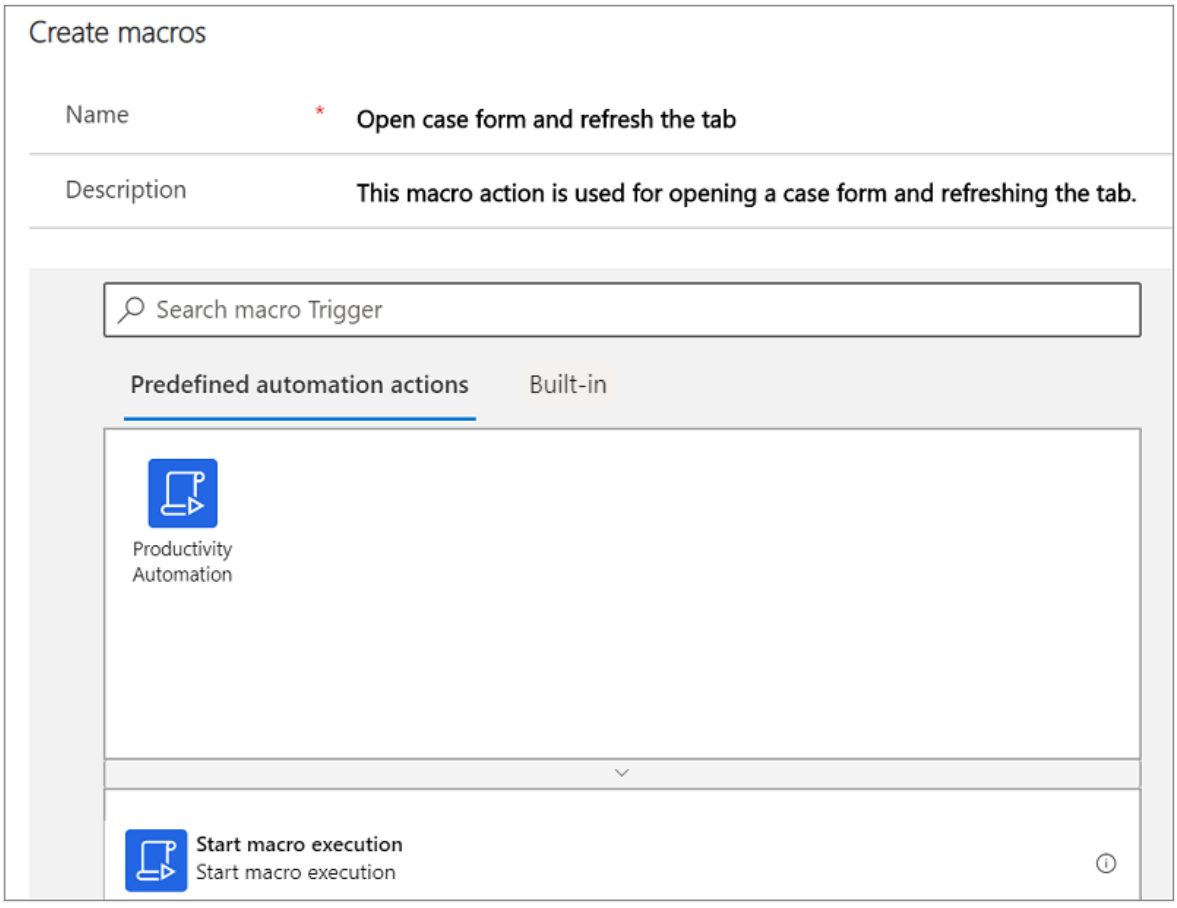
   b. For **Macros**, select **Manage**.

2. On the page that appears, select **New**.

3. On the **Macros** page, specify the following.

Field	Description	Example value
Name	Provide a name to the macro. The name is displayed to the agent at runtime.	Create case
Description	Describe the purpose of the macro. The description is displayed to the agent at runtime.	This macro action is used to create a case.

4. On the **Preferred automation actions** tab, select **Start macro execution**, and then select **New step**.



a. Select a connector from the list. The following connectors are available:

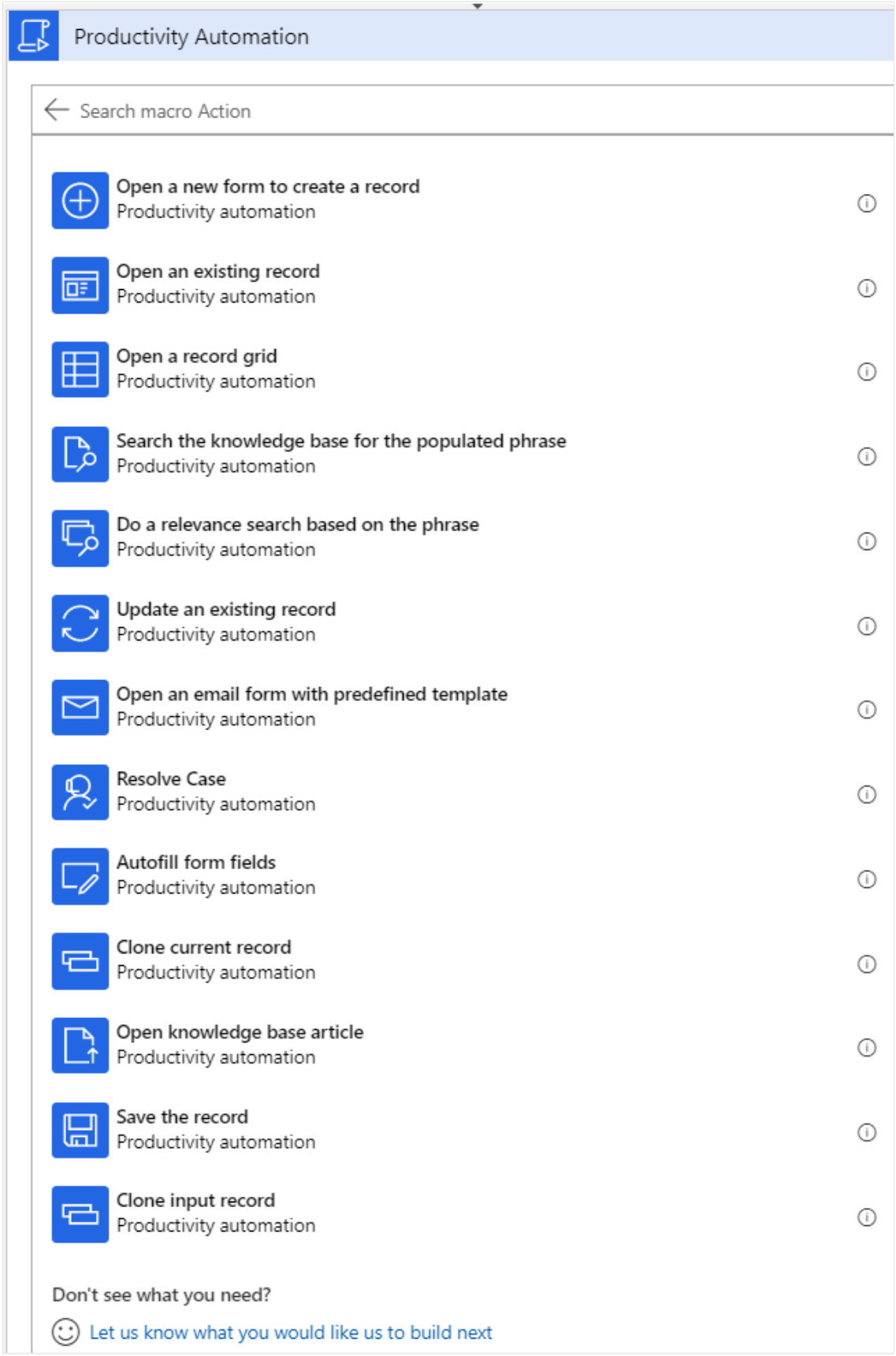
- Productivity Automation
- Session Connector
- Omnichannel Connector

b. Select an action from the list of actions. You can add as many actions as you need, based on your business requirements.

If you select **Productivity Automation**, you'll see the following actions.

Purpose	Action name

Purpose	Action name
Open a new form to create a record	Create new
Open an existing form	Open form
Open a record grid	Open grid
Search the knowledge base for the populated phrase	Search knowledge articles
Do a relevance search based on the phrase	Search
Update an existing record	Update record
Open an email form with predefined template	Open email
Resolve a case	Resolve case

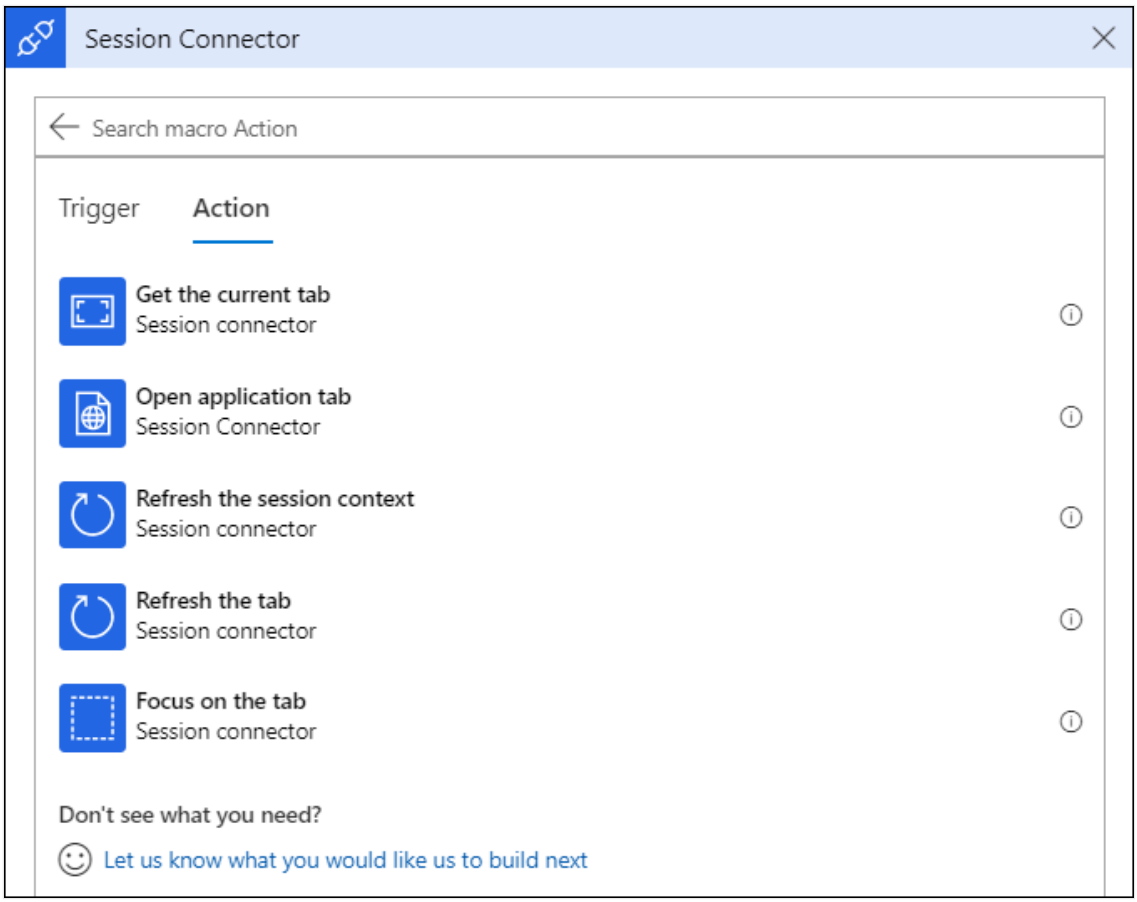


For example, select **Open a new form to create a record**, and the step appears. More information: Productivity automation.

If you select **Session connector**, you'll see the following actions.

Purpose	Action name

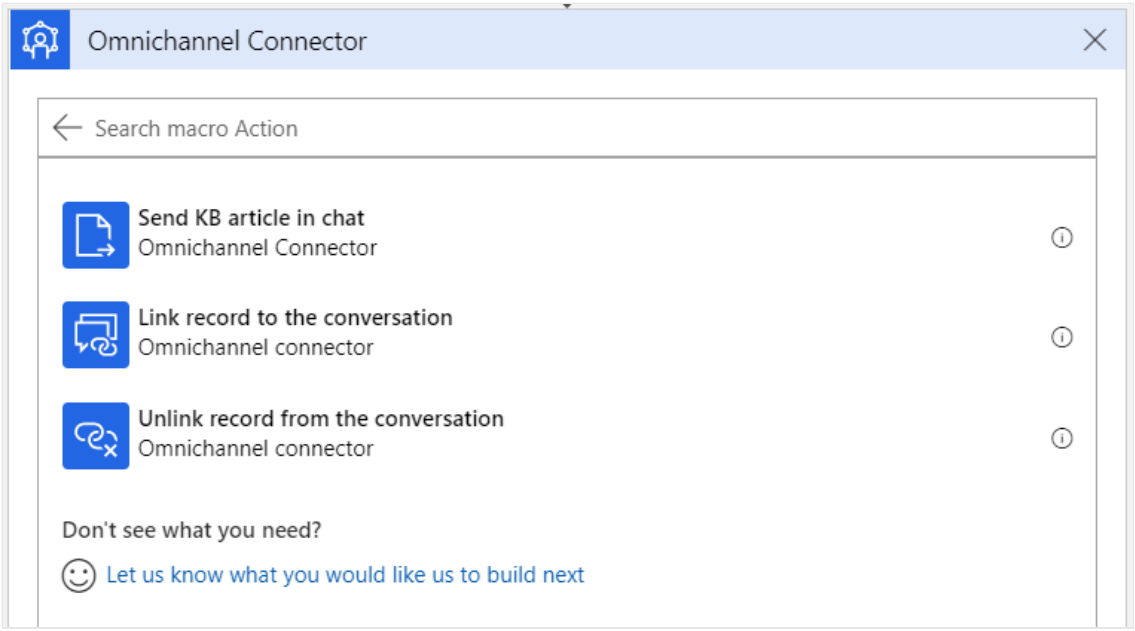
Purpose	Action name
Refresh the application tab	Refresh tab
Focus on a particular application tab from another application tab	Focus tab
Get the details of the current application tab	Get current tab



More information: Session connector

If you select **Omnichannel connector**, you'll see the following actions.

Purpose	Action name
Link a record to the conversation while interacting with the customer	Link record to the conversation
Unlink a record from the conversation while interacting with the customer	Unlink record from the conversation

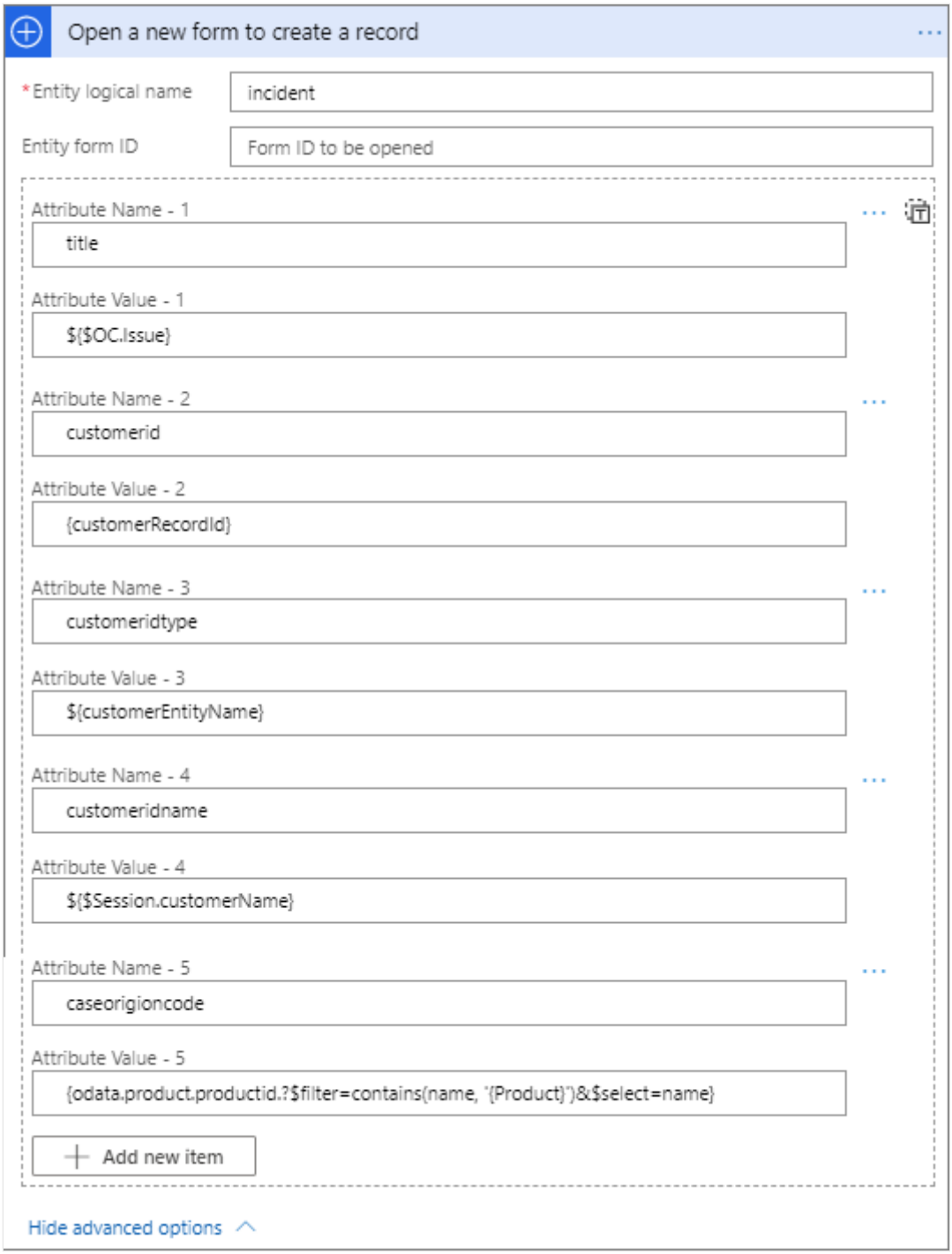


More information: Omnichannel connector

> **Note**
>
> Omnichannel connector is not available in Customer Service workspace.

5. Specify the values in the fields. To learn how to specify the values, see Use automation dictionary to pass data parameters keys.

   If you selected **Open a new form to create a record**, you can select **Show advanced options** to add the attributes and values you want. If required, you can select **Add new item** to add more attributes.



6. After you add an action step, to define conditions, select the **Built-in** tab, and select **Control**.

7. Select **Condition** to define the conditions. The condition has **If true** or **If false**. Define the condition as per your requirement.

8. To add another action step, repeat step 7 and optionally step 8.

9. Select **Save and close**.

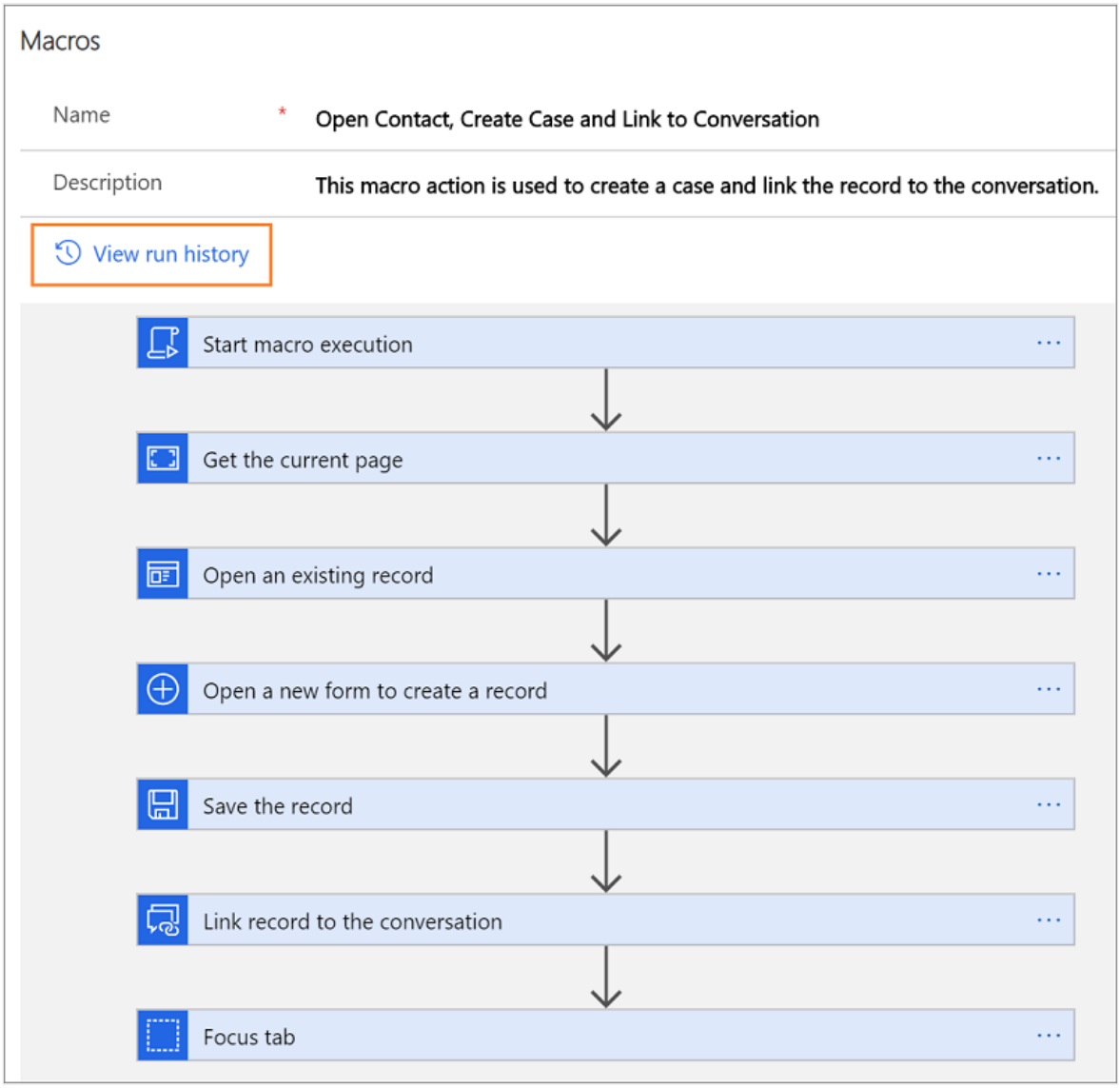
Now, when the agent runs the macro, the actions will be run by fetching the data parameter keys according to the context available from the sources. More information: Use automation dictionary to pass data parameters keys.

View macro run history

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

As an administrator, you can view the macro run history, which shows how many times a macro has been run, along with the success or fail status. When you select a macro that failed, you can view the exact action step at which the failure occurred.

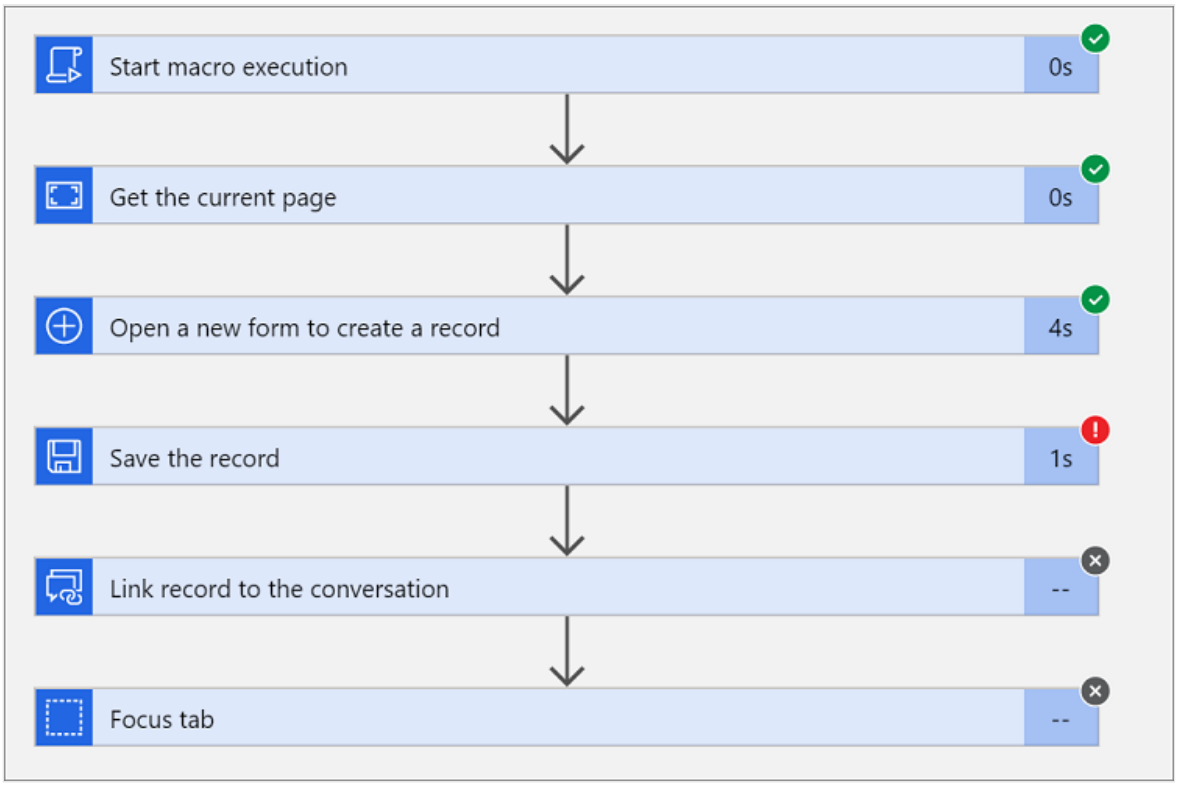
1. Go to the **Macros** page, and select the macro for which you want to view the history.
2. Select **View run history**.



3. Select the macro that failed from the list.

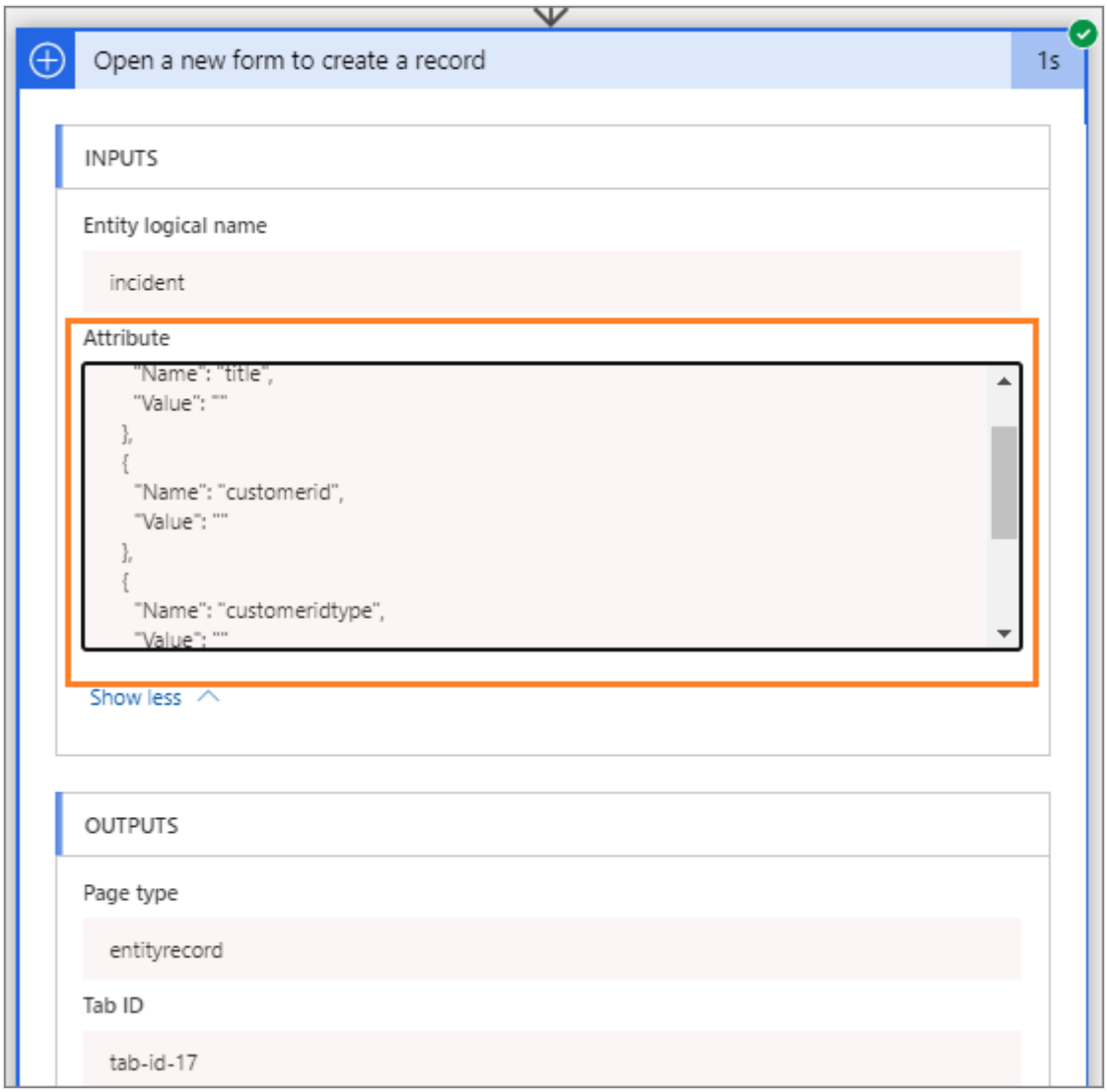
Name	User	Macro status	Executed on
Open Contact, Create	Kenny Smith	Succeeded	1/17/2020 10:42 AM
Open Contact, Create	Kenny Smith	Succeeded	1/17/2020 9:17 AM
Open Contact, Create	Kenny Smith	Succeeded	1/17/2020 1:13 AM
Open Contact, Create	Kenny Smith	Succeeded	1/16/2020 4:46 PM
Open Contact, Create	Kenny Smith	Failed	1/16/2020 3:53 PM
Open Contact, Create	Kenny Smith	Succeeded	1/16/2020 3:51 PM
Open Contact, Create	Kenny Smith	Failed	1/16/2020 3:50 PM
Create Case and Link	Kenny Smith	Failed	1/16/2020 3:44 PM
Create Case and Link	Kenny Smith	Succeeded	1/16/2020 9:42 AM
Create Case and Link	Kenny Smith	Failed	1/14/2020 6:50 PM
Create Case and Link	Kenny Smith	Failed	1/14/2020 6:48 PM

4. See the macro action step that caused the failure. Review the previous step for any issue in the slug data parameters that might've been passed incorrectly or slug data parameters that were updated incorrectly.



For example, when you select on the **Open a new form to create a record** step, select **Show more**, and you can view that the mandatory fields don't have values,

which are mandatory to save the record. Due to this reason, the macro run failed at the **Save the record** step.



5. Fix the macro step action that you think might have caused the failure, and then try running it again. For example, since the values are not resolved, go to the macro designer and then check on the slugs, and then try running the macro again.

> **Note**
>
> If the issue persists, contact Microsoft support.

See also

Use automation dictionary to pass data parameters keys
Agent scripts
Smart Assist

Manage custom productivity tools (preview)

Article • 04/05/2023

> **ⓘ Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

The productivity pane supports custom productivity tools developed as custom pages or Power Apps component framework controls. You can create multiple custom productivity tools and make them available to your users with agent experience profiles.

Prerequisites

Ensure that the following prerequisites are met:

- You have the **Productivity tools administrator** security role. To learn more, see Assign roles and enable users.
- Agents and supervisors have the **Productivity tools user** security role. To learn more, see Assign roles and enable users.
- A custom page or a Power Apps component framework control to be hosted as a custom productivity tool. To learn more, see Overview of custom pages for model-driven apps and Power Apps component framework.

Configure a custom productivity tool

1. In Dynamics 365, go to Customer Service admin center.
2. In the site map, select **Productivity** in **Agent experience**.
3. On the page that appears, select **Manage** for **Productivity tools (Preview)**.
4. Select **New**, enter the following details on **New Pane tool configuration**:
    - **Name**: The display name of the custom productivity tool.
    - **Unique Name**: A unique name.
    - **Type**: Select **Control** or **Custom Page**.
        - **Custom Page Name**: The name of the custom page.
        - **Control Name**: The name of the control.
    - **Icon**: The web resource containing the target icon to be displayed in the productivity pane (optional).
    - **Description**: A description of the productivity pane (optional).
    - **Learn More Link**: A link to the help page for the custom productivity tool (optional).
5. Save the changes.
6. In the site map, select **Workspaces** in **Agent experiences**, and select **Manage** for **Agent experience profiles**.
7. Select the agent experience profile that you want to modify, and select **Edit** for **Productivity pane** on the page that appears.
8. Enable the custom productivity tool, and save the changes.

> ⓘ **Note**
>
> - Custom productivity tools hosted in the productivity pane are not contextually bound to the session.
> - Custom productivity tools don't have a mechanism to retrieve information from the session context.

See also

Productivity tools in Customer Service

Use automation dictionary to pass parameter keys

Article • 02/13/2023

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

The automation dictionary maintains the contextual data for sessions. You can use the keys from the automation dictionary to pass the parameter in an action.

While creating templates and macros in the admin app, you can pass parameter keys such as title of a session, title of notification, title of an application tab template, and custom parameter values for application tab types. These keys are replaced based on the contextual information available at the time of execution.

Pass data parameter in templates

Let's take a scenario for templates with the notifications.

The notification shows certain fields and values, which are called **Field header** and **Value**, respectively.

Kenny Smith, a customer, initiated a conversation and when the agent sees the notification, it displays **Customer Name** as **Kenny Smith**.

Here, **Field header** is **Customer Name** and the **Value** is **Kenny Smith**.

For templates to identify the name of the customer as **Kenny Smith**, you (the administrator) must pass the parameter as keys.

Similarly, for session and notification titles, you can pass the data parameters. More information: Automation dictionary formats to data parameter keys

The system replaces these parameter keys with the actual values based on the context of the session, channel provider, Microsoft Dataverse, and user actions. More information: Types of context data parameters

Pass data parameter in macros and agent scripts

Macros are a set of configured sequential actions that are run on demand by the user. As an administrator, you need to configure the actions that a macro must perform. To configure the actions, you need to pass the data parameters. More information: Automation dictionary formats to pass data parameter keys

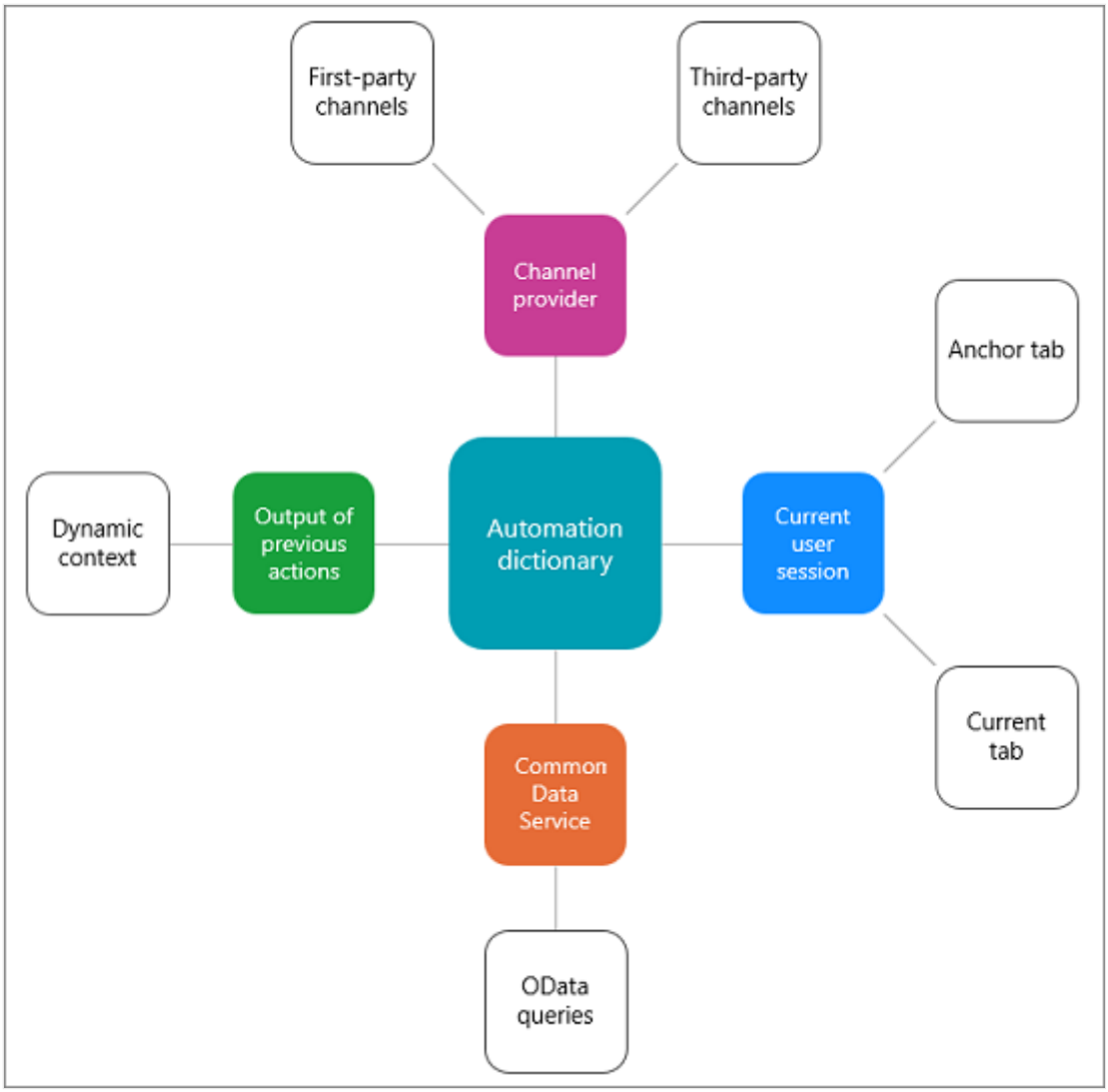
When the agent runs the macro, the system replaces these parameter keys with the actual values based on the context of the session, channel provider, Dataverse, and user actions.

When the context is from a session, the macro action is run based on the information for a current session, where the information is obtained from an Anchor tab or current tab that's in focus. For example, to create a case, you need to define the actions that contain the incident entity form and the GUID of the form (optional). More information: Types of context data parameter

Types of context data parameters

The automation dictionary uses the context data parameters that are available from the following sources:

- Context data from the channel provider
- Context data from user actions
- Context data from Dataverse
- Context data from other macro actions



Context data from the channel provider

This context data is from the first-party channel provider such as Omnichannel for Customer Service or a third-party channel provider that uses the widget exposed by Dynamics 365 Channel Integration Framework. The context data from Omnichannel for Customer Service are pre-conversation survey, visitor portal navigation, and so on.

Context data from user actions

This data is populated as and when agents perform some activities in the session. An example is opening a new customer record, case, and so on.

Context data from Dataverse

The organizational data is stored in Dataverse, and you can fetch the data with the use of OData queries. More information: OData queries

Context data from other macro actions

An *action* in a macro generates context data that is consumed by other actions in that macro.

For example, there are two action steps in the following order:

1. Open a new form to create a record.
2. Open an email form with a predefined template.

While creating the **Open an email form with predefined template** action, you can get the context data parameter keys from the **Open a new form to create a record** macro action step.

The context data parameter from the first macro action are as follows:

- Entity Logical Name
- Page Type
- Tab Id

> **Note**
>
> The context data parameters from other macro actions are specific to macros, and aren't applicable to templates.

Automation dictionary formats to pass data parameter keys

The automation dictionary maintains the contextual data for sessions. The keys in the automation dictionary can be passed as parameters to the action in macros. The system replaces these parameter keys with the actual value based on the context of the session, channel provider, Dataverse, and user actions.

The automation dictionary supports the following formats:

- Slugs
- OData queries
- Static values

Slugs

A *slug* is a replacement parameter that the system populates at runtime based on context. Use the following list of slugs only for macros and agent scripts, and to set an agent script as the default by using the agent script expression builder. More information: Productivity tools

Slugs for productivity tools (macros and agent scripts)

Macros and agent scripts support the following slugs:

Slug	Description
`${customerName}`	The name of the customer who initiated the conversation.
`${caseId}`	The unique ID of a case. The system displays the case ID only if a case is linked to the conversation.
`${caseTitle}`	The title of the case. The system displays the title of the case only if the case is linked to the conversation.
`${LiveWorkItemId}`	The unique ID of the conversation.
`${queueId}`	The unique ID of a queue. This alphanumeric string is displayed in the queue page URL.
`${visitorLanguage}`	The language of the customer who initiated the conversation.
`${visitorDevice}`	The device of the customer who initiated the conversation.
`${entityRoutingLogicalName}`	The name of the entity, if the notification is for an entity record.
`${entityRoutingRecordId}`	The unique ID of the entity record, if the notification is for an entity record. More information: Entity records routing
`${customerEntityName}`	The name of the entity (contact or account), if the customer is authenticated.
`${customerRecordId}`	The unique ID of the entity (contact or account), if the customer is authenticated.
`${<name of the pre-conversation survey questions>}`	All the pre-conversation survey questions that are configured for a workstream will have the slug name as the name of the question.

> **Note**
>
> Only the `${anchor.<attribute_name>}` slug is supported in the macros and scripts for Customer Service workspace.

Slug for reconnection link

The following slug is used to generate a reconnection link that can be shared with customers to connect back to the same agent and conversation. More information: Configure a reconnection to a previous chat

Slug	Description
`{ReconnectUrl{ReconnectID}}`	Used in quick replies to generate the reconnect link.

Format for slugs for productivity tools

The `${Slug}` parameter format that retrieves the context from the channel provider, current user session, output of other macro actions, or Dataverse.

Productivity automation context

When you want to execute a slug in the productivity automation context, which is used to perform operations related to model-driven apps in Dynamics 365, use the ${</slug/>} format. For example: `${customerName}`

Session connector context

When you want to execute a slug in the session context, you must use the `${$session.<slug>}` format. For example: `${$session.customerName}`

Slugs that are available for session context include:

- `${$session.visitorDevice}`
- `${$session.visitorDevice}`
- `${$session.entityRoutingLogicalName}`
- `${$session.entityRoutingRecordId}`
- `${$session.<name of the pre-chat survey questions>`

Omnichannel connector context

When you want to execute a slug in the Omnichannel for Customer Service context, you must use the `${$oc.<slug>}` format. For example: `${$oc.customerName}`

The `Session.CurrentTab.<Attribute>` and `Session.AnchorTab.<Attribute>` parameters provide context data based on the current session and the anchor tab or the current tab in focus. The following are the supported attribute types:

- EntityName

- EntityId

Examples:

- `Session.CurrentTab.<EntityName>`
- `Session.CurrentTab.<EntityId>`
- `Session.AnchorTab.<EntityName>`
- `Session.AnchorTab.<EntityId>`

> **Note**
>
> The `Session.CurrentTab.<Attribute>` and `Session.AnchorTab.<Attribute>` parameters are only applicable to macros and aren't applicable to templates.

Slugs for templates

The list of supported slugs are:

Slug	Description
`{anchor.<attribute_name>}`	Is used to access attributes of the record that is loaded in the anchor tab.
`{customerName}`	The name of the customer who initiated the conversation.
`{caseId}`	The unique ID of a case. The system displays the case ID only if the case is linked to the conversation.
`{caseTitle}`	The title of the case. The system displays the title of the case only if the case is linked to the conversation.
`{queueId}`	The unique ID of a queue. This alphanumeric string is displayed in the queue page URL.
`{visitorLanguage}`	The language of the customer who initiated the conversation.
`{visitorDevice}`	The device of the customer who initiated the conversation.
`{entityRoutingLogicalName}`	The name of the entity, if the notification is for an entity record.
`{entityRoutingRecordId}`	The unique ID of the entity record, if the notification is for an entity record. More information: Entity records routing
`{customerEntityName}`	The name of the entity (contact or account), if the customer is authenticated.

Slug	Description
`{customerRecordId}`	The unique ID of the entity (contact or account), if the customer is authenticated.
`{<name of the pre-chat survey questions>}`	All the pre-chat survey questions that are configured for a workstream will have the slug name as the name of the question.

Format for slugs for templates

The `{Slug}` parameter format that retrieves the template context from the channel provider, current user session, or Dataverse. For example: `{caseId}`

OData queries

You can use OData queries to get the contexts that are available from Dataverse.

The OData query format is:

`{$odata.<entityName>.<entityAttributeName>.<?options>}`

Examples:

- `{$odata.account.name.?$filter=accountid eq '{customerRecordId}'}`
- `{$odata.incident.prioritycode.?$filter=incidentid eq '{caseId}'&$select=prioritycode}`
- `{$odata.incident.title.?$filter=incidentid eq '{caseId}'&$select=title}`

Static values

These are hard-coded values that you update based on your business requirements. For every hard-coded attribute you choose, follow the format type for the particular attribute.

Example (Macro):

You want a case title to always be appended with **Contoso -**. You use the **Open a new form to create a record** action with following fields.

Parameter	Value
Entity Logical Name	incident
Attribute Name	Case title

Parameter	Value
Attribute value	`Contoso - {caseTitle}`

Here, **Contoso -** is the hard-coded static value.

Example (Templates):

For an incoming chat request, you want to provide the static title to the session and notification template that agents see at runtime.

Notification title = `New chat request`

Session title = `Chat conversation`

See also

Manage session templates
Manage application tab templates
Manage notification templates
Associate templates with workstreams

Overview of Community

Article • 01/28/2022

Welcome to Dynamics 365 Customer Service Community, a new app that offers a suite of capabilities that are designed to help your organization invite customer suggestions and crowd source portfolios of outside-in ideas. Community can help fuel your business transformation, build customer trust with process transparency, and drive timely follow-up for suggestions.

In addition to providing feedback to organizations, end users use Community to collaborate on a social scale, and rally behind suggestions from others to help shape the future of the products they use.

The following two separate installations are required to use Customer Service Community:

1. **Dynamics 365 Customer Service Community**: The installation requires at least one Customer Service Enterprise license in your organization tenant. Dynamics 365 Customer Service Community provides community managers and moderators with the necessary capabilities to capture and evaluate ideas and demonstrate care with closed loop, applying their organization brand across user interaction points. This installation allows you to do the following tasks:

    - Configure of the modern Community portal to fit your organization brand, including colors, custom header and footer, and quick links.
    - Enforce acceptance of your terms of use and privacy statement by end users.
    - Create and manage idea forums.
    - Manage content, including content moderation and merge of duplicate ideas.
    - Update the status and respond to community feedback.
    - Manage users and assign security roles on a forum level.

2. **"Modern Community" portal template**: This template offers delightful end-user experiences that are available out of the box. End users can share new ideas with organizations and collaborate on a social scale. This installation lets your end users do the following tasks:

    - Browse, search, filter, and sort idea lists.
    - Post new ideas. This flow includes autosuggestion of existing ideas to prevent duplicates.
    - Collaborate and engage in a community that includes upvoting, commenting, sharing, and following ideas.
    - Flag inappropriate content.

- Track the status of ideas users engaged with in own personalized space.

See also

Get started with Community
Create a Community forum
Content moderation and management
Create new websites in Community
Community FAQs

Install Customer Service Community

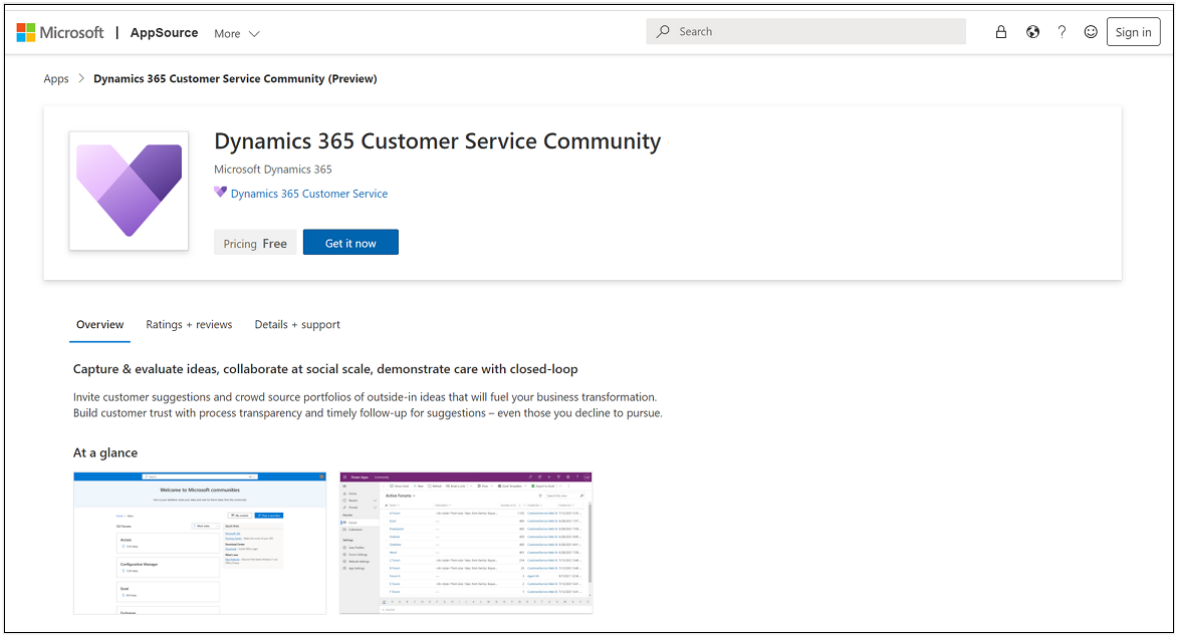
Article • 10/03/2023

The Customer Service Community app allows your organization to invite customer suggestions and crowd source ideas to help shape the future of products they use.

> **Note**
>
> To install Customer Service Community, you must have a Dynamics 365 organization and ensure that the organization tenant has at least one Customer Service Enterprise license.

To install Dynamics 365 Customer Service Community:

1. Go to the Microsoft AppSource Dynamics 365 Customer Service Community download page.
2. Select **Get it now**, and then sign in with your Dynamics System Admin account.



3. Select the environment where you want to install Customer Service Community, accept the terms, and select **Install**.

Provision Modern Community website

1. Confirm that Customer Service Community successfully installed in the previous procedure.
2. Go to Power Pages, and then select the environment where you installed Customer Service Community.

3. Go to **Templates** tab, and then select the **Dynamics 365** tab.
4. Select **Modern Community** > **Choose this template**.
5. Select **Done**. Site provisioning typically takes a few minutes, and then when it completes, it's displayed in the **Active Sites** list under **Home**.

When your Modern Community site has been created, you can view the Community home page by going to https://<name>.powerappsportals.com/d365community.

Next Steps

Create your first Community forum Community overview
Create a Community forum
Content moderation and management
Create new websites in Community
Community FAQs

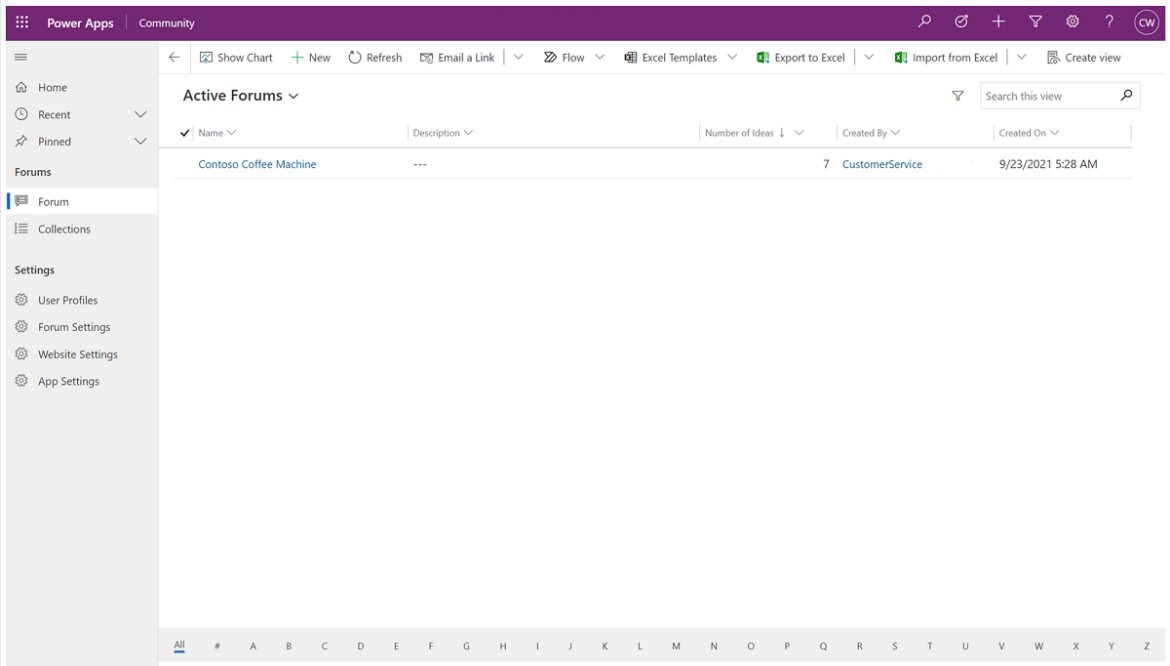
Create a Community forum

Article • 01/28/2022

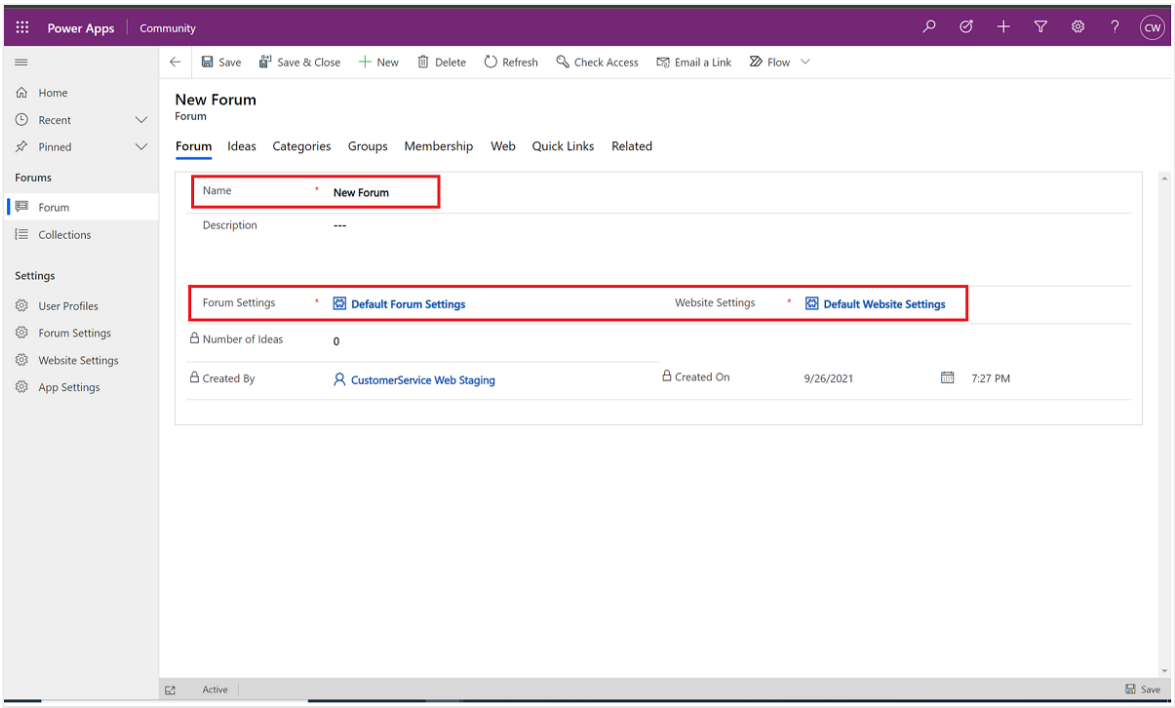
In Customer Service Community, a forum is a container of ideas and the entity where security boundaries are applied. The user who creates a forum automatically becomes the owner, and can assign community roles and membership in the forum, as well as other metadata, like categories and groups.

Create a forum

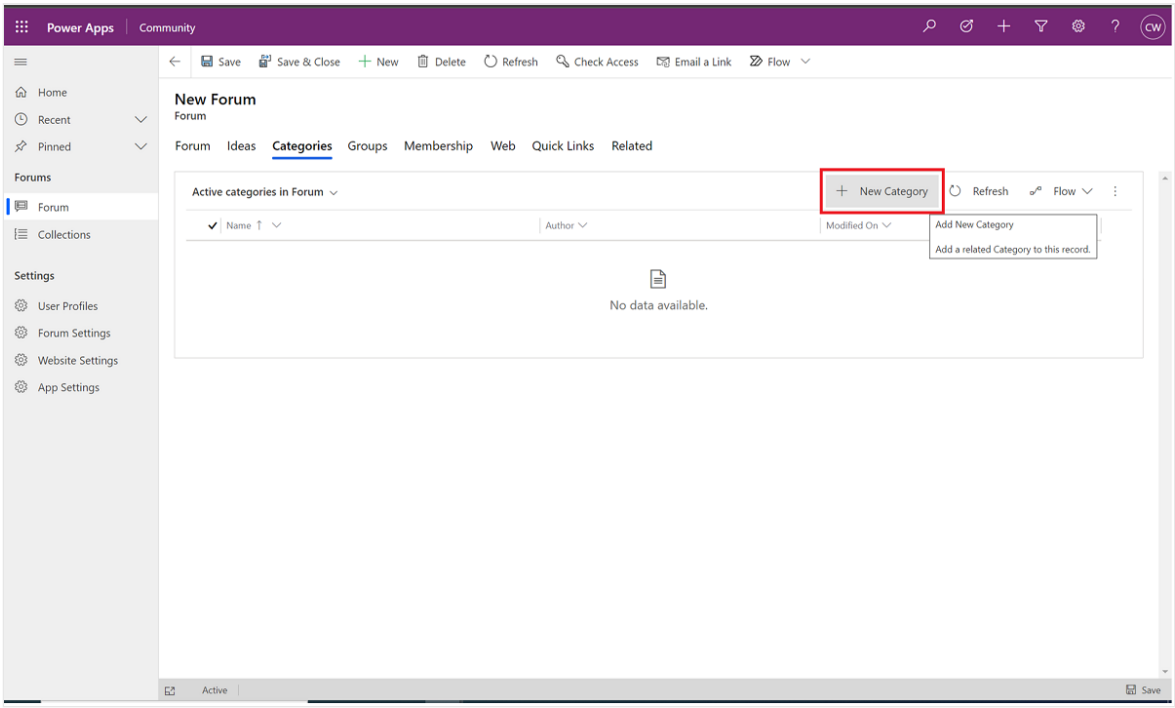
1. On the left-side navigation panel, select **Forum**, and then select **New**.



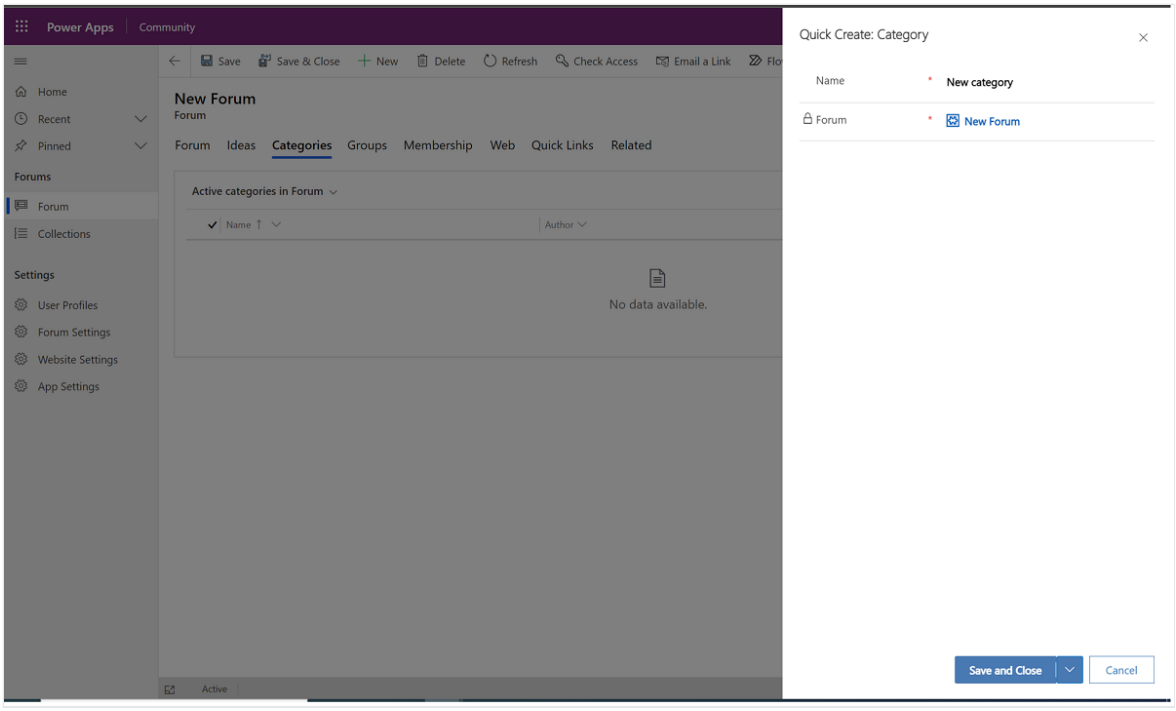
2. Enter a **Name**, then select the **Forum Settings** and **Website Settings** you want to apply to the forum. Settings are managed by your administrator.



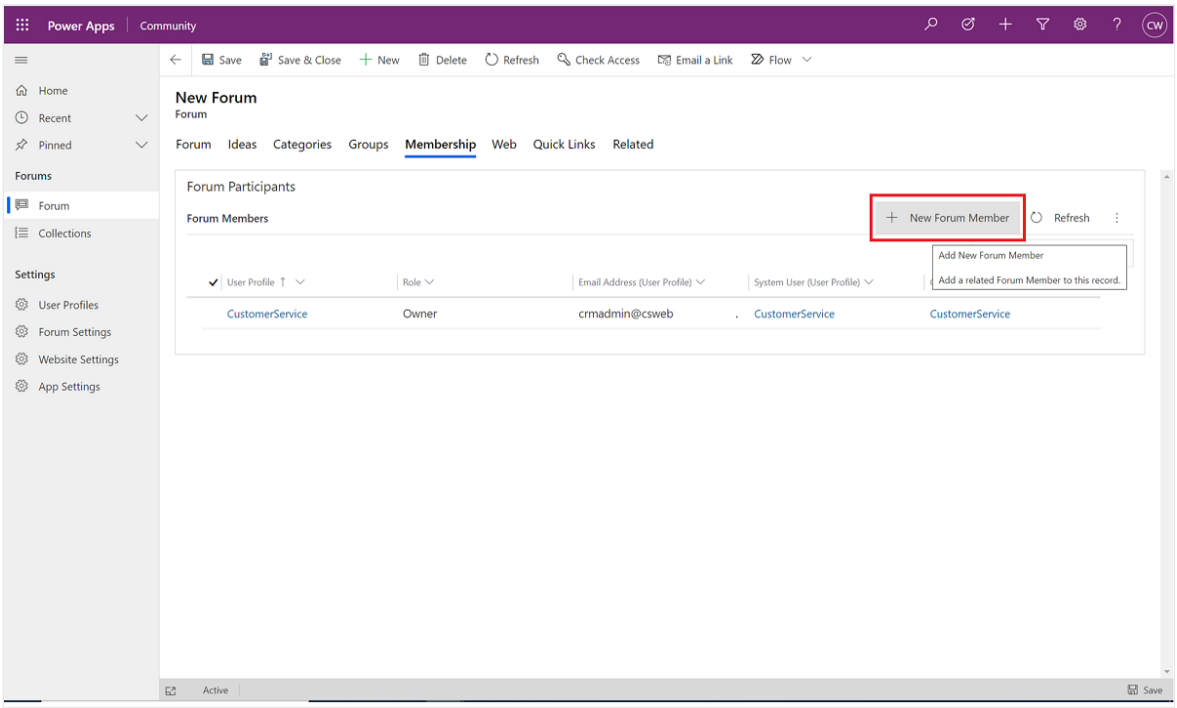
3. Select the **Categories** tab, and then select **+ New Category**. Categories you define here will be available for end-users to select when they create a new idea in this forum.



4. Enter a **Name** for the category, and then select **Save**.

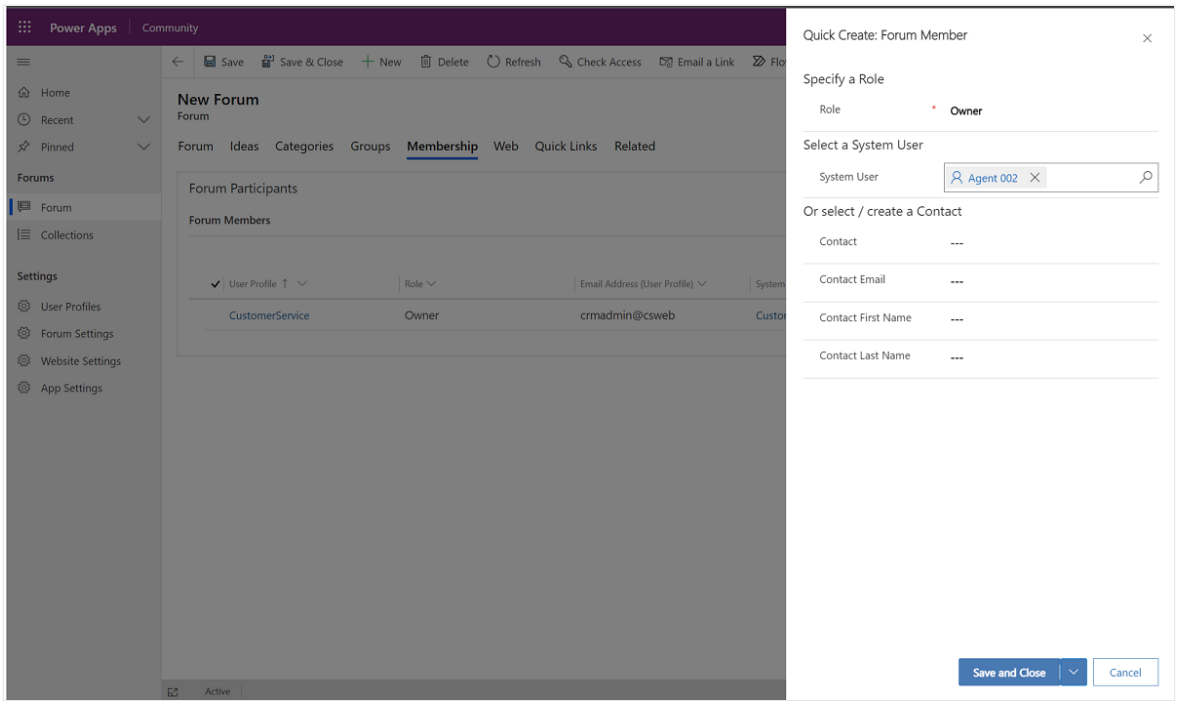


5. To add more categories, repeat steps 3 and 4 above.
6. When you are finished, select **Save and Close**.
7. Go to the **Groups** tab and select **+ New Group**. The groups you define here will be available for end-users to select when they create a new idea in this forum.
8. Enter a group name, and then select **Save**.
9. To add more groups, repeat steps 7 and 8 above.
10. Go to the **Membership** tab to add members to your forums. You'll see that you are already added as owner. The **Membership** tab is where you add forum owners and moderators.
11. Select **+ New Forum Member**.

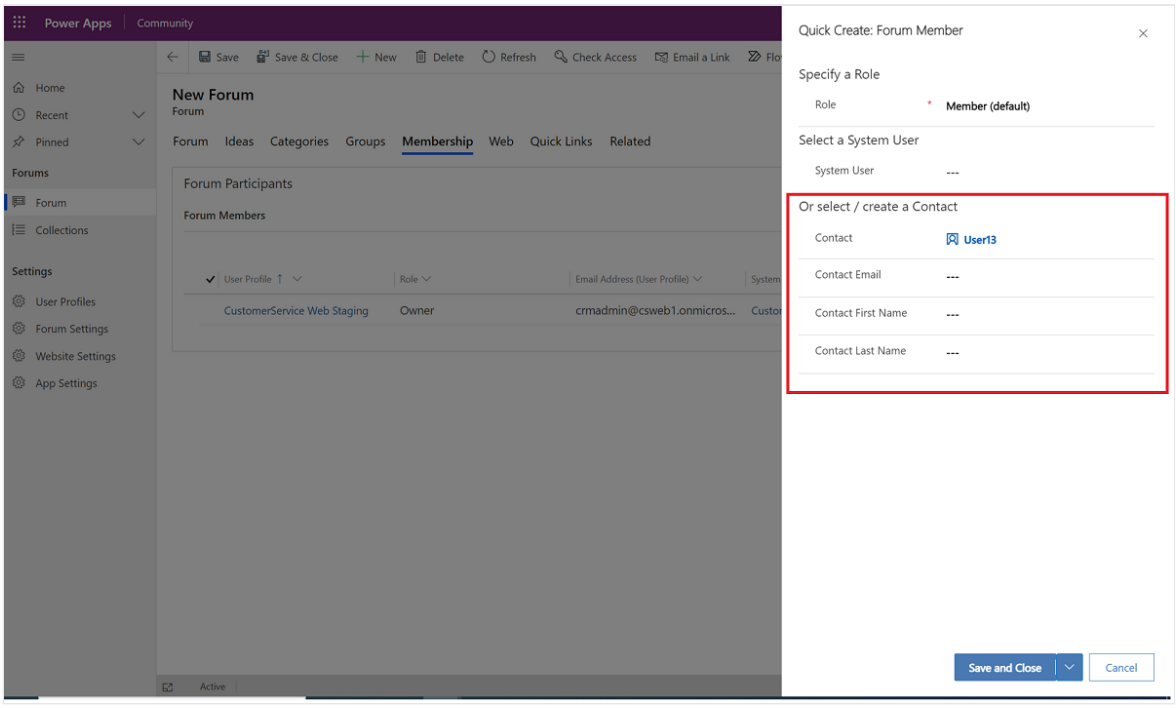


12. In the **Role** dropdown menu, select **Owner** or **Moderator**, then in **System User**, search and select the user you want.

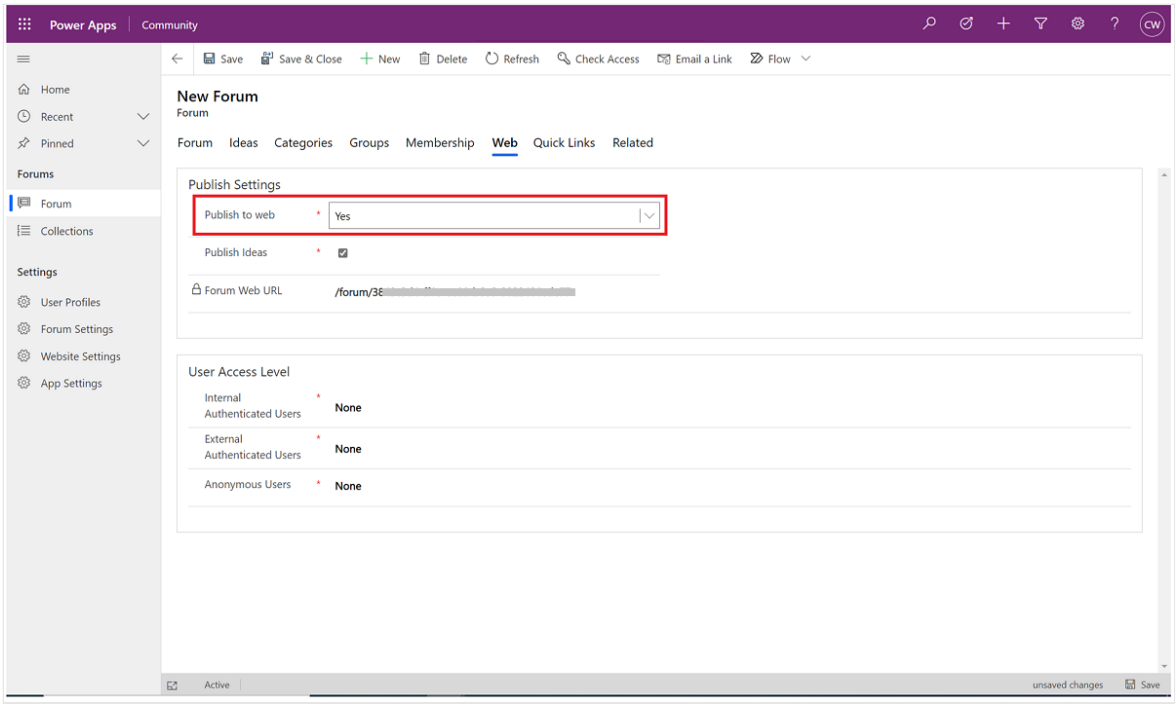
13. Select **Save**.



14. To add other owners or moderators, repeat steps 11-13.
15. (Skip this step if your forum is public.) If your forum is private (for example, accessible to "by-invitation" members only), you'll need to add those individuals as contacts. Select **+ New Forum Member**, select **Member** in **Role**, and then either search for the existing contact in **Contact** or add information for a new contact in **Contact Email**, **Contact First Name**, and **Contact Last Name**. Repeat this step to add all by-invitation members.



16. To publish your forum to the web, go to the **Web** tab, and then select **Yes** in the **Publish to web** dropdown menu.

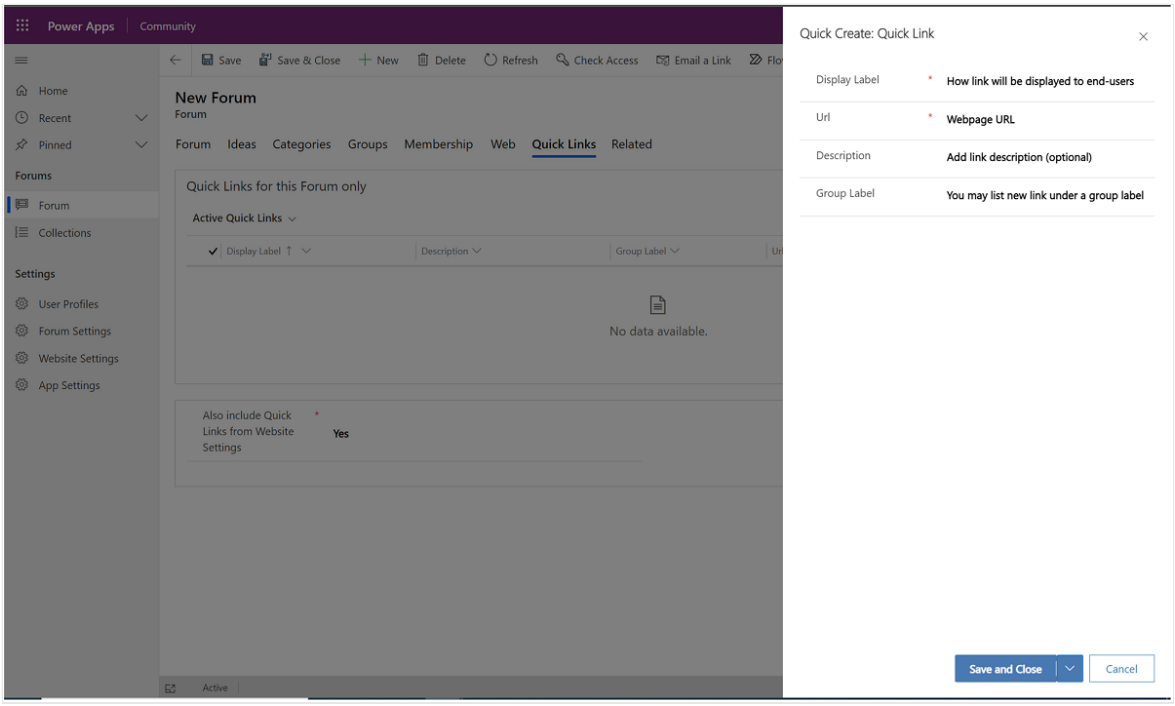


17. Under the **User Access Level**, select the access level for your users in public forums. The default values are **None** for all three configurations. **Important**: For private forums, leave the default settings set to **None**.

    - **Internal Authenticated Users**: Select the access level for users who are authenticated with email domains specified by your admin.
    - **External Authenticated Users**: Select the access level for non-internal authenticated users.
    - **Anonymous Users**: Select the access level for non-authenticated users.

18. Go to the **Quick Links** tab to define links that show to end-users in the forum. You can choose whether to include quick links that the admin added to the portal home page.
19. To add a forum **Quick Link**, select **+ New Quick Link**, and then enter the following values:

    - **Display Label**: Refers to how the link will be displayed in the portal.
    - **URL**: The webpage URL.
    - **Description**: An optional field where you can provide additional information to describe this link to users.
    - **Group label**: An optional field where you can specify the name of the group under which the link will be listed.



See also

Community overview

Get started with Community

Content moderation and management

Create new websites in Community

Community FAQs

Content moderation and management

Article • 01/28/2022

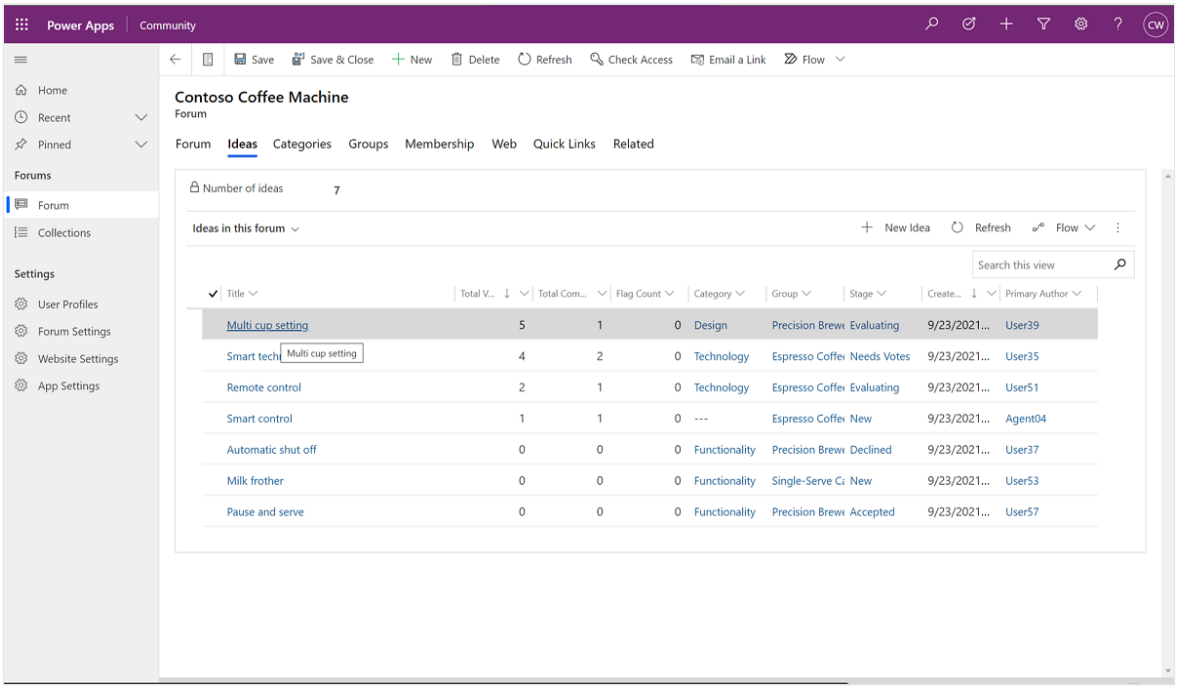
Moderate content in Customer Service Community

Forum owners and moderators will use Customer Service Community to manage and moderate content, and can do the following tasks:

- Edit a forum's name and description
- Edit the idea name and description, and update fields, including category, group, and stage
- Add a new moderator response to an idea
- Manage comments, including adding a moderator response to a comment, and manage comment flags
- Manage idea votes
- Manage idea flags

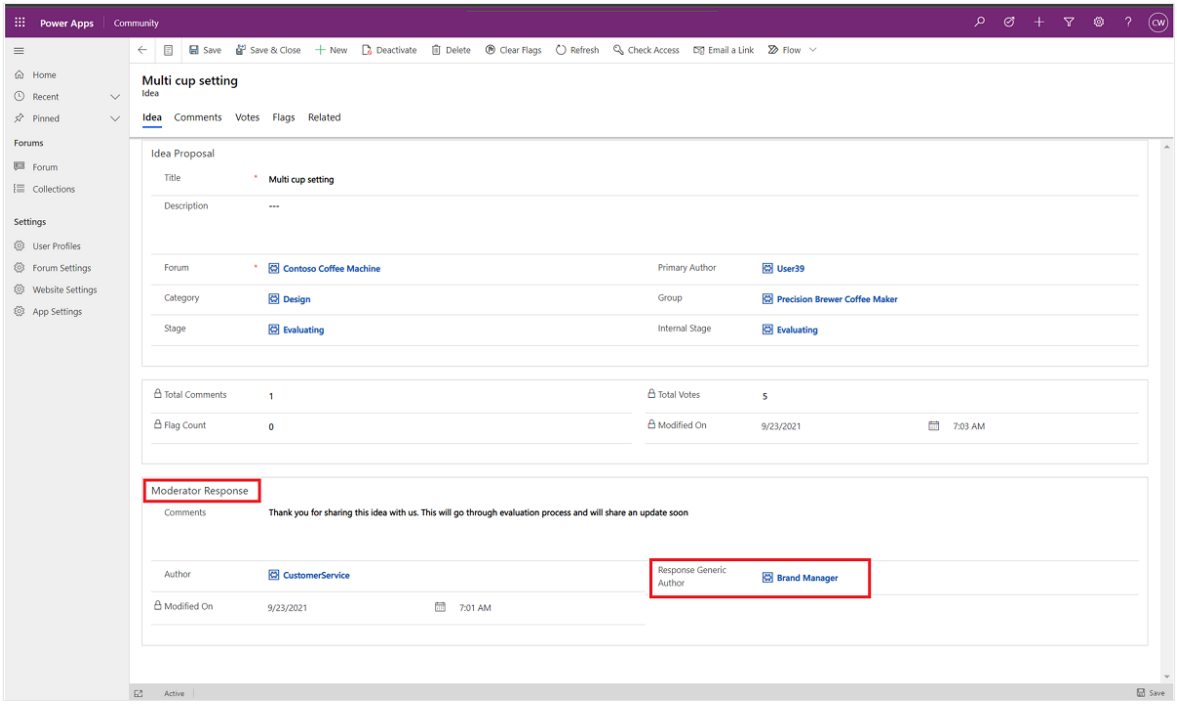
Follow these steps to moderate Community content:

1. Navigate to the forum, and then select the **Forum** tab.
2. Update the forum **Name** and **Description**.
3. Select the **Ideas** tab, and then select the idea you want to edit.

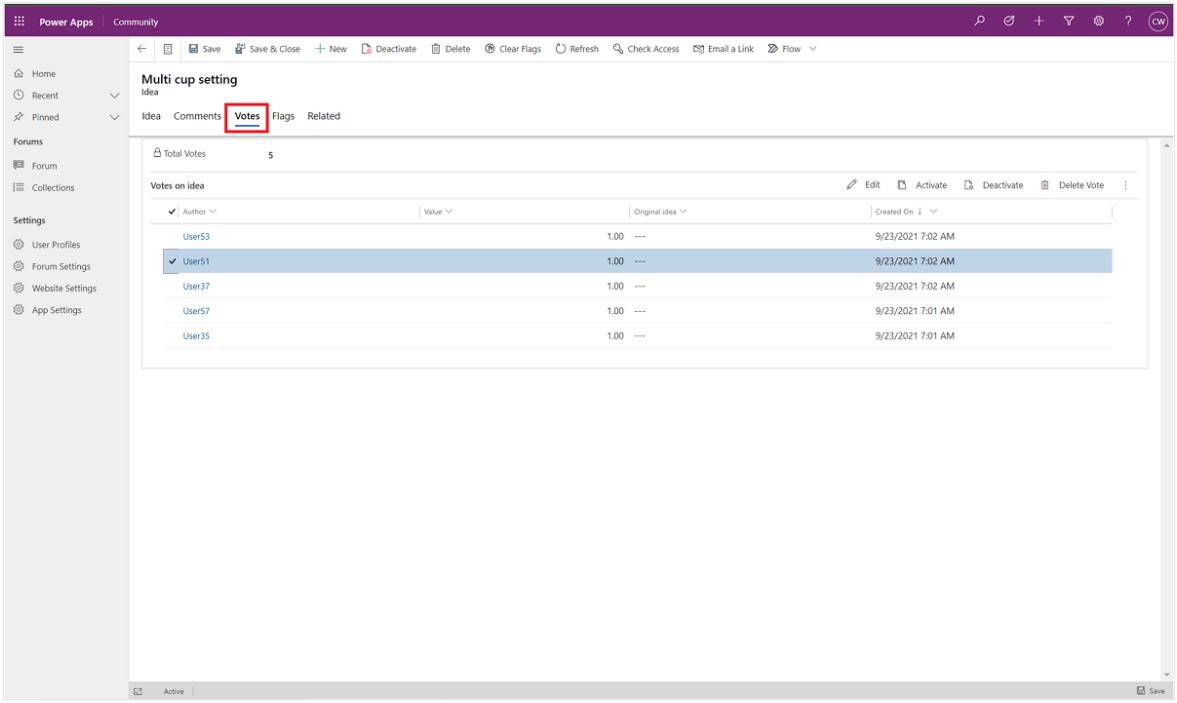


4. Update the fields as desired. You can also add a **Moderator Response** and select **Response Generic Author**. **Response Generic Author** enables you to associate a

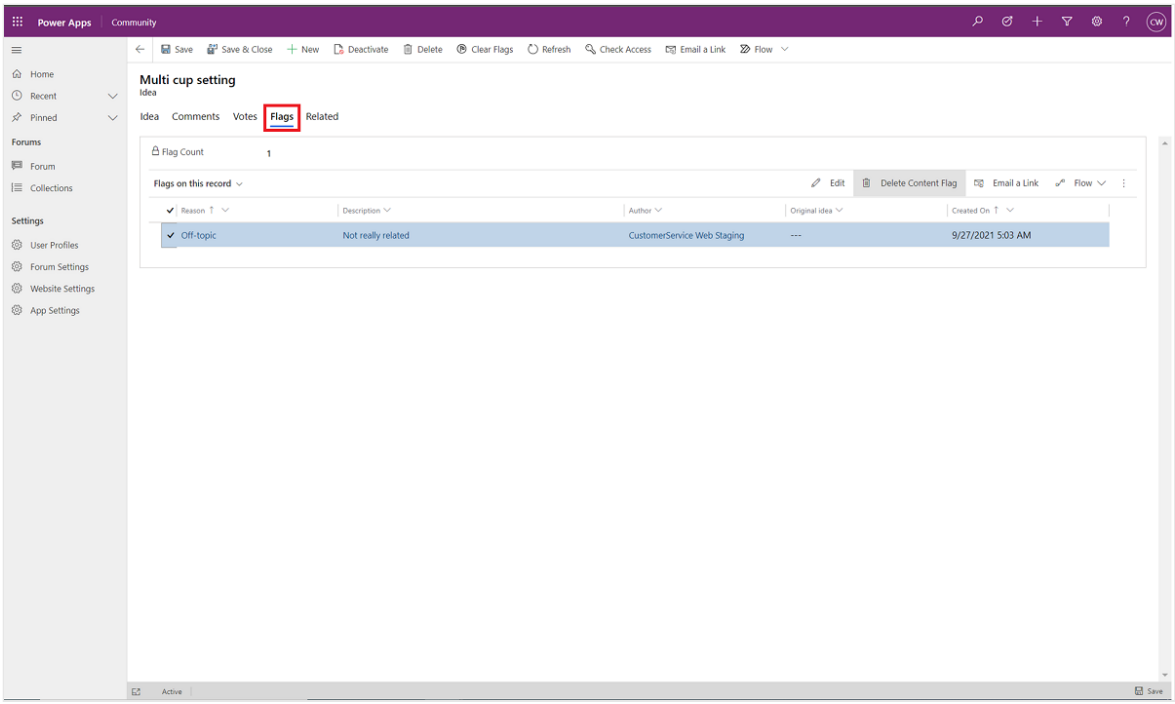
generic role to your response in portal, rather than show your name. The list of generic roles is managed by your admin.



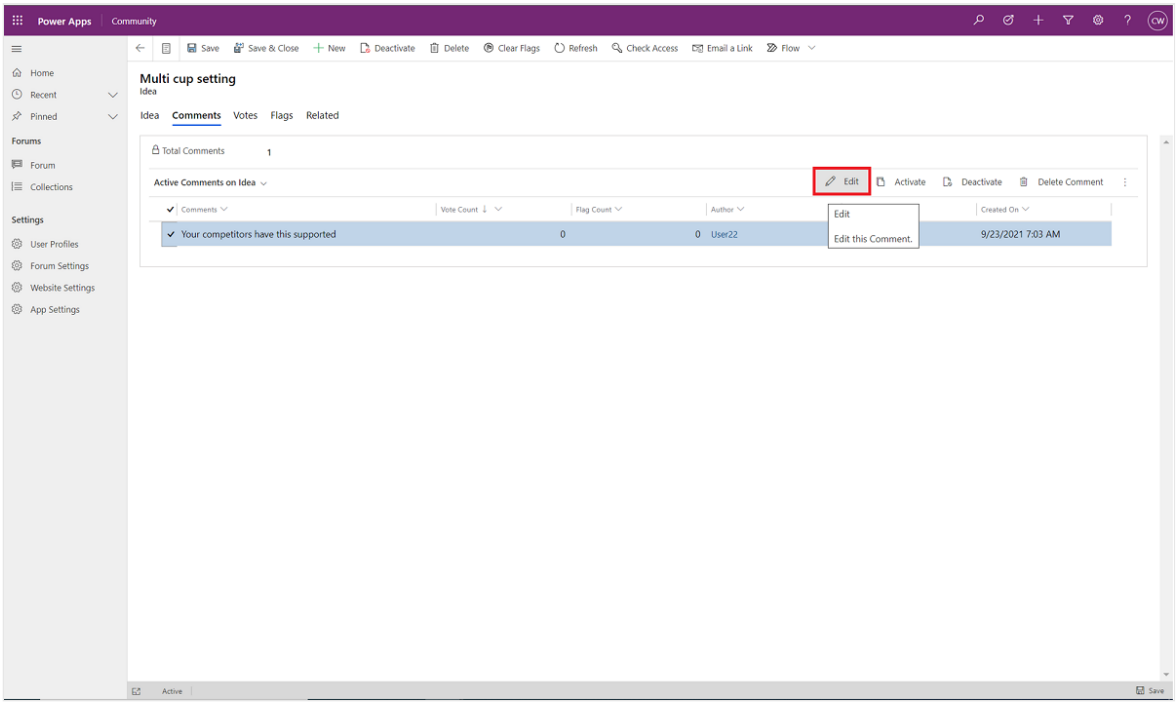
5. To manage idea votes, select the **Votes** tab. A vote value can be either 0 (no vote) or 1 (a single upvote).



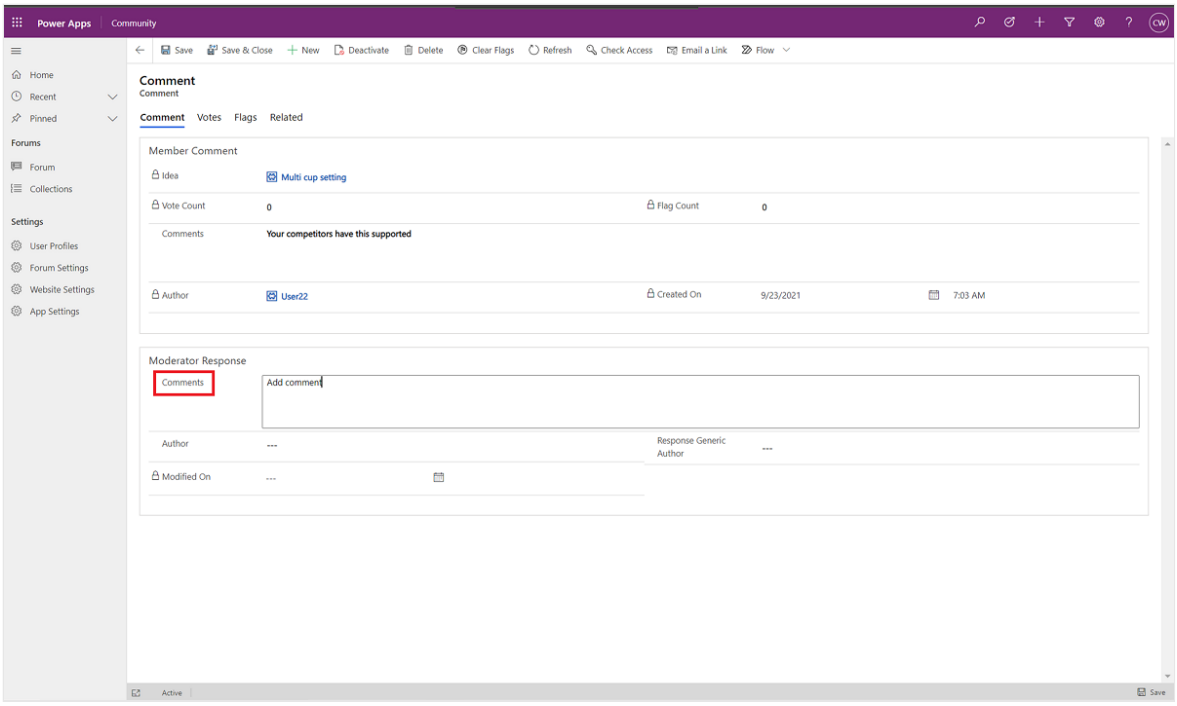
6. From the portal, end-users can flag ideas as inappropriate. Forum owners and moderators can go to **Flags** tab to view and manage idea flags.



7. Go to the **Comments** tab to manage end-user comments. Under **Active comments on idea**, select the comment you want to edit, and then select **Edit**.



8. Under **Moderator Response**, in the **Comments** field, type the desired response. Go to the **Flags** tab to manage flags on this comment.

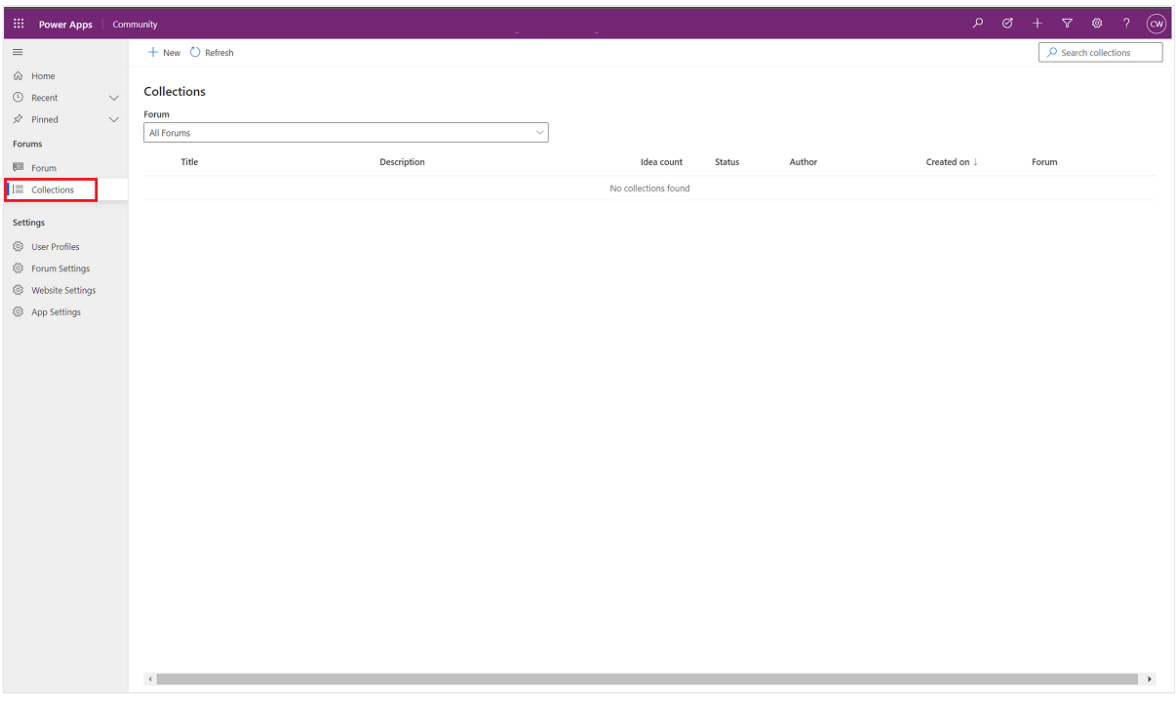


Create collections

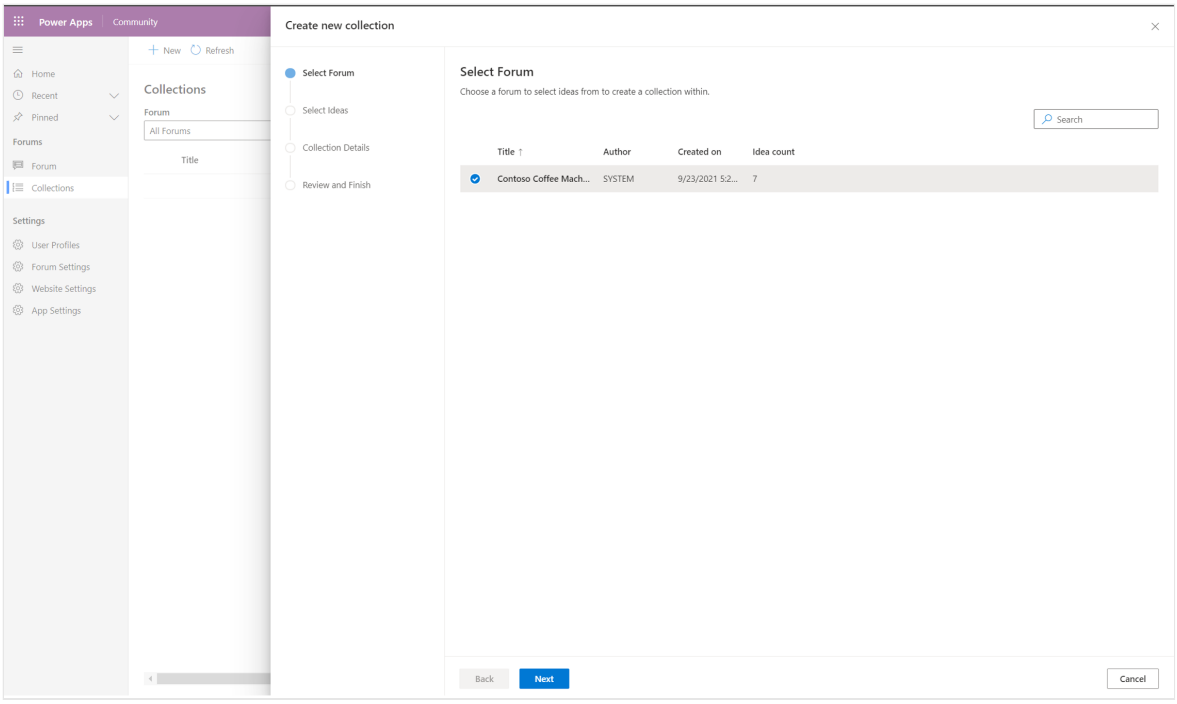
To combine duplicate or related ideas, forum owners and moderators can create a collection. Successfully created collections will show in the portal, and all the associated ideas (also called "children ideas") will be removed. Users who contributed to the children ideas can still view them (read only) on the **My Content** page.

Follow these steps to create a collection:

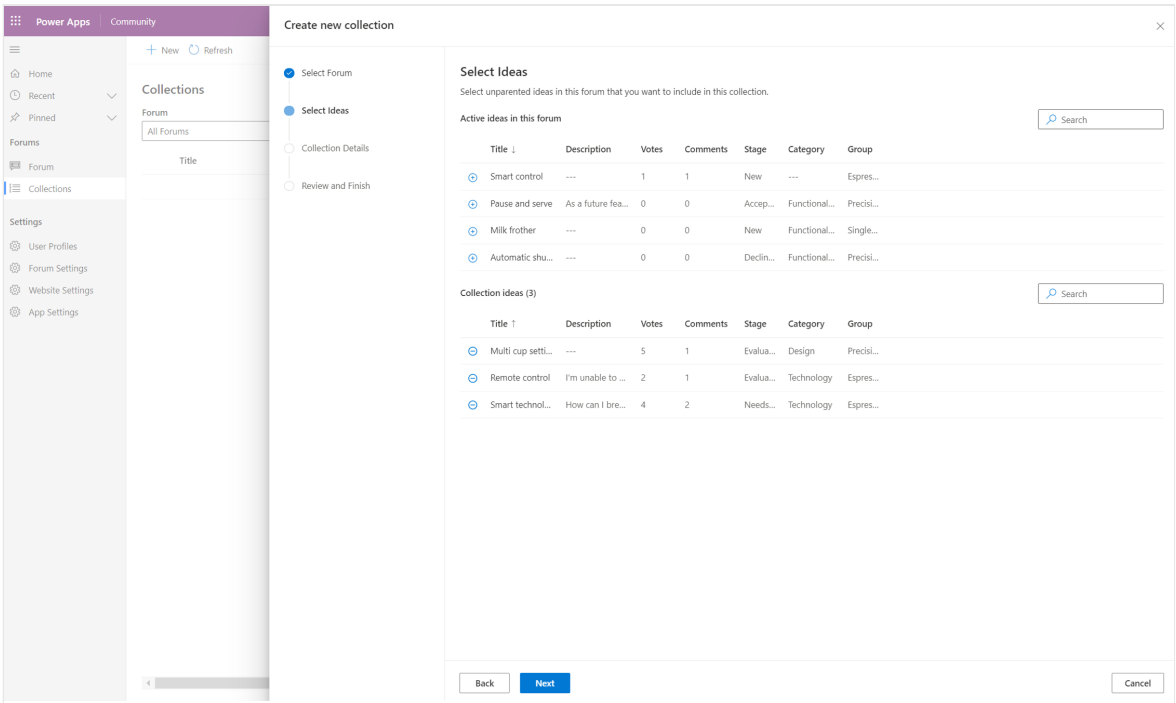
1. On the left-side navigation pane, select **Collections**, and then select **+ New**.



2. Select the forum you want to combine ideas from, and then select **Next**.



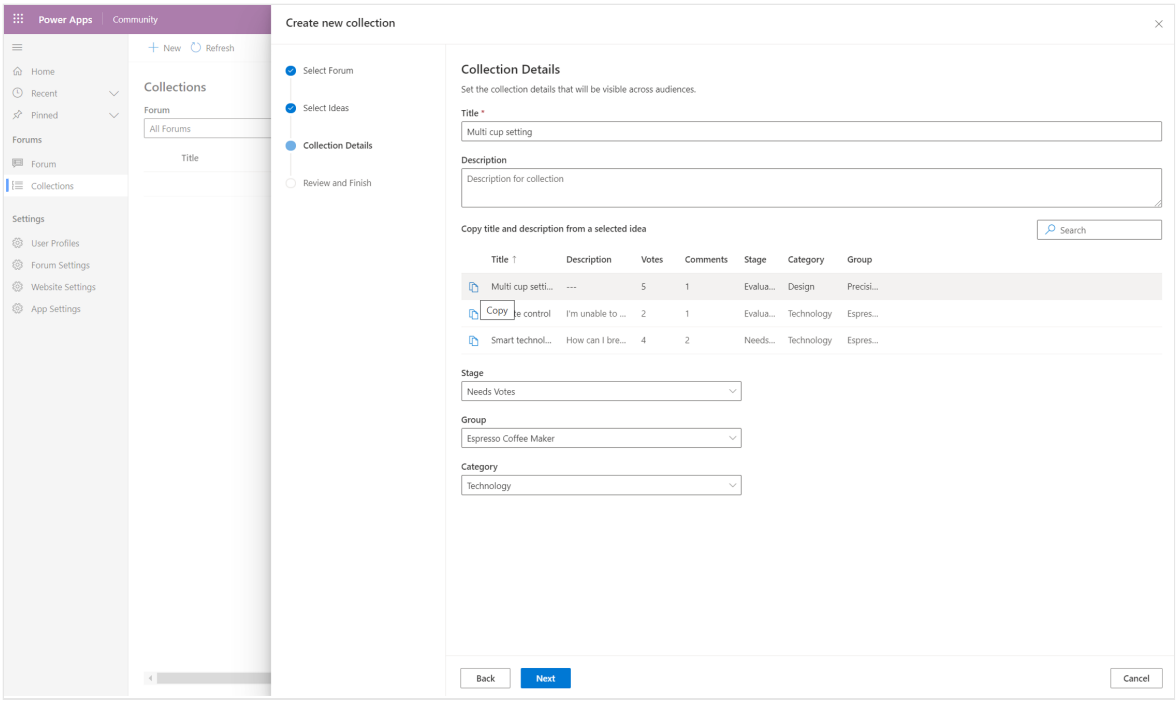
3. Select the plus sign (+) to add ideas from **Active ideas in this forum** list to the collection. Utilize search in long lists. Added ideas will show in the **Collection ideas** list.



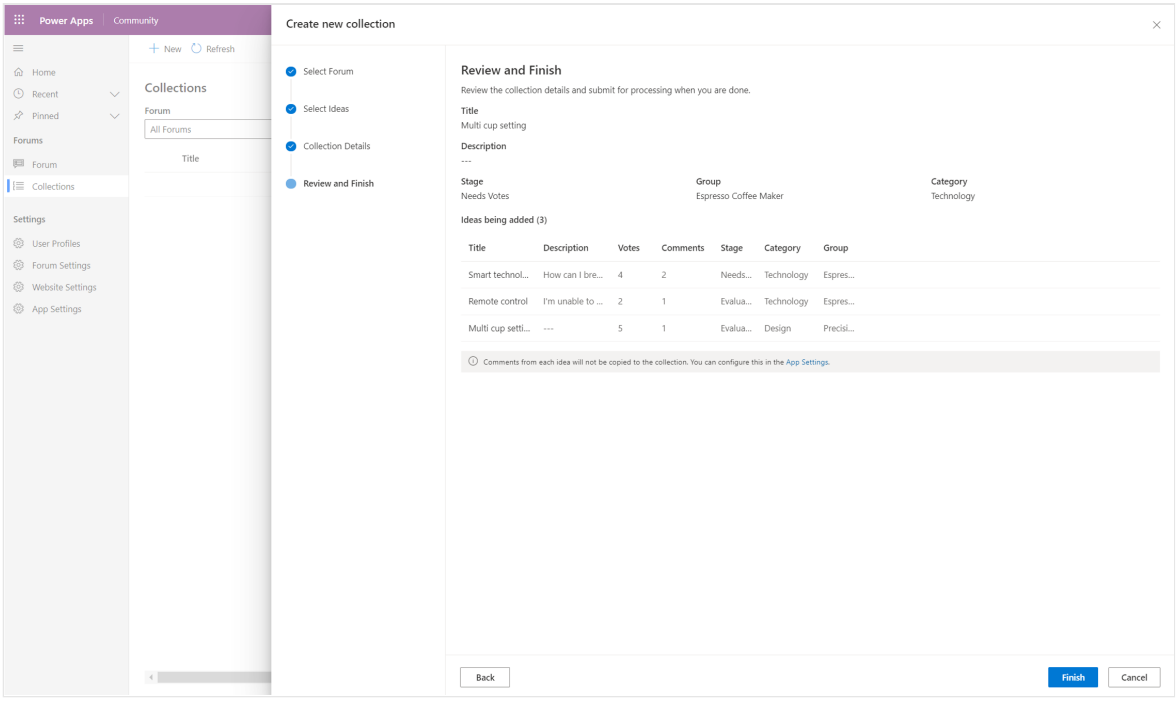
4. When you're done adding ideas, select **Next**.

5. Add a **Title** and **Description** for the new collection. You can also copy these fields from one of the child ideas.

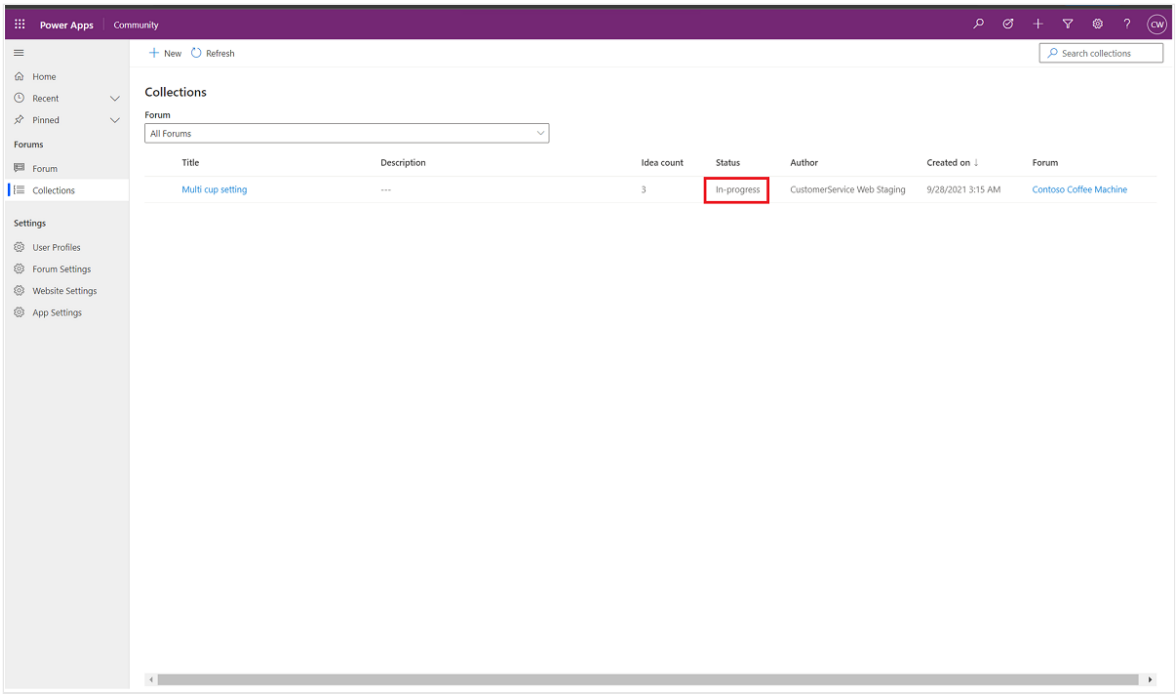
6. Optional: You can select the **Stage**, **Group**, and **Category**, and then select **Next**.

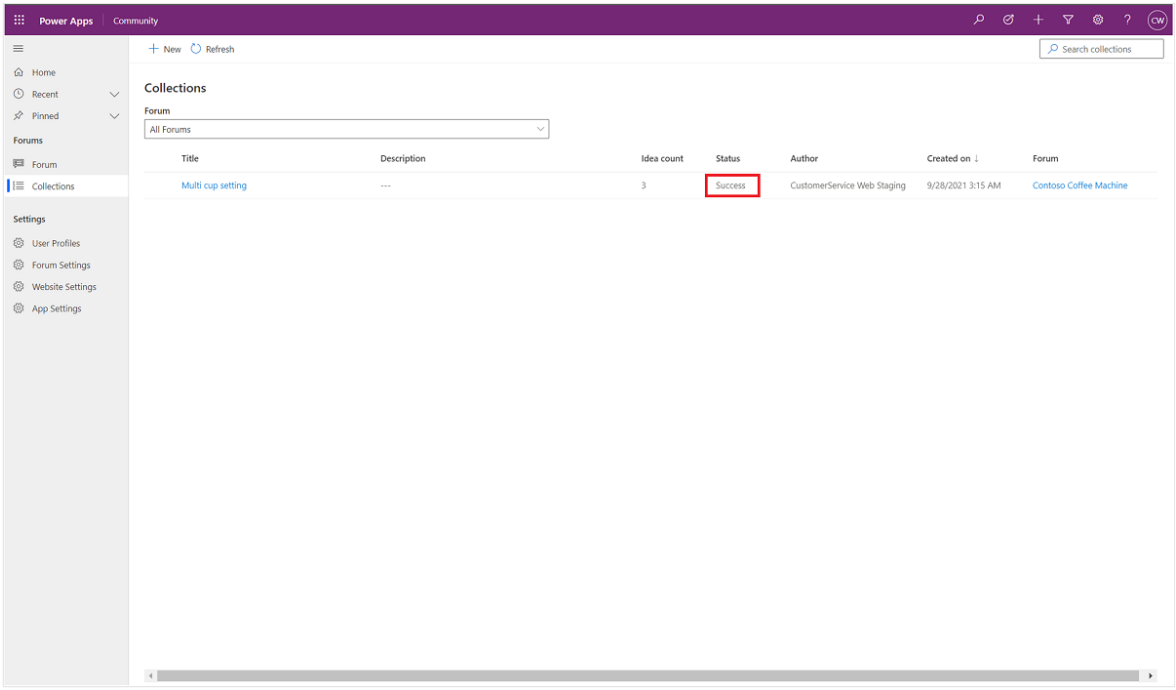


7. Confirm that the details are correct, and then select **Finish**.



8. Wait for the status of the new collection to change from **In-progress** to **Success**. Refresh the page to get the latest status.





See also

Community overview
Get started with Community
Create a Community forum
Create new websites in Community
Community FAQs

Community FAQs

Article • 06/23/2023

I'm unable to install Community. What should I do?

To install Community, make sure that you have at least one Dynamics Customer Service Enterprise license in your tenant.

Is Community available in all clouds?

No. Community is currently only available in the public cloud.

How long does it take for community manager and moderator updates in Dynamics Customer Service Community to reflect in the portal?

It takes up to 15 minutes for these updates to reflect in the portal.

How do I contact Dynamics Customer Service for support on Community?

To post questions for our team, use the Dynamics 365 Customer Service Community forum.

To share feedback and ideas for how we can improve Customer Service, go to the Dynamics 365 Customer Service ideas forum and select the relevant category.

See also

Community overview
Get started with Community
Create a Community forum
Content moderation and management
Create new websites in Community

Create new websites in Community

Article • 10/03/2023

Complete the following steps to create a new website in Community:

1. Go to **Website Settings** in the site map.
2. Select **New** to create a website.
3. Go to Power Pages to provision a portal for the new website.

See also

Overview of Community
Get started with Community
Create a Community forum
Content moderation and management
Community FAQs

Overview of unified routing

Article • 05/31/2023

Unified routing is an intelligent, scalable, and enterprise-grade routing and assignment capability that can direct the incoming work item to the best-suited queue and agent by adhering to work item requirements and matching them with the agent's capabilities.

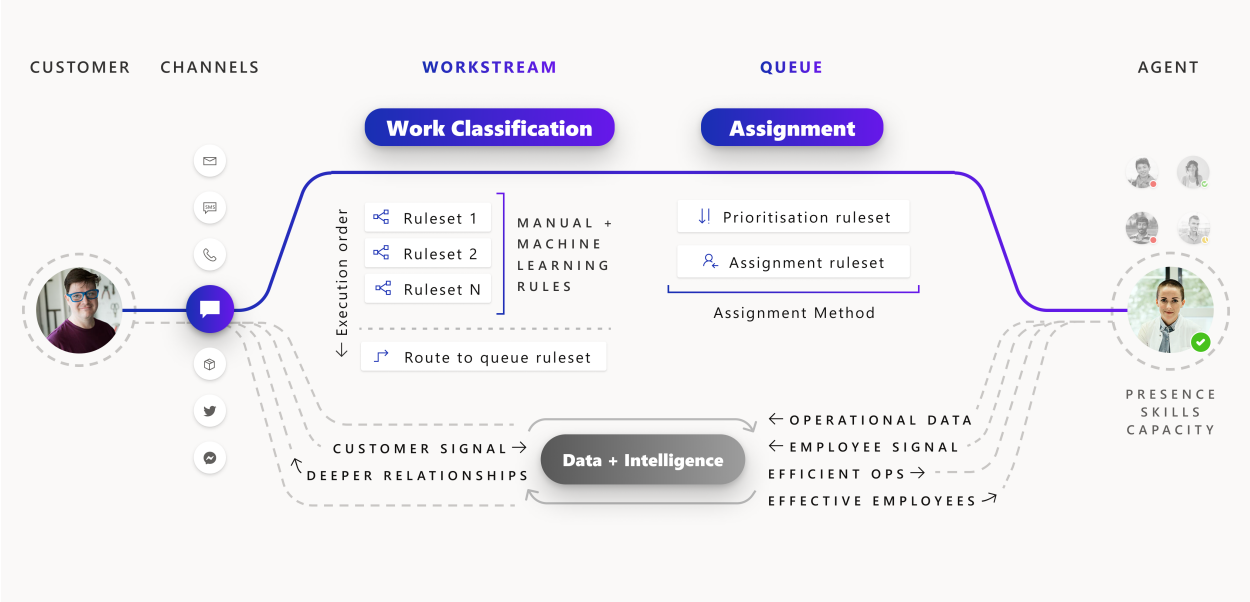
The unified routing infrastructure can be used to route service requests on all channels. This creates a unified view of workforce utilization across multiple channels, and thus helps to optimize distribution of work across the workforce. It works in a truly omnichannel way by ensuring that work items on all the channels are routed in a consistent and similar manner. It takes the agent engagement on different channels into account before any new work is assigned to them.

Unified routing has two main stages: classification and assignment.

In the classification stage, rules and machine learning (ML) models can be used to add information on the work item, which can be used to find the best-suited agent.

During the assignment stage, the service requests are prioritized and then assigned to the agents based on the nature of the work, related entities, agent skills, and the current state of the agent workforce in terms of availability and workload.

For instance, an organization receiving an incoming chat will add information on the work item—such as skills required, urgency level, category of customer, and importance level—in the classification stage, based on certain conditions that are met as part of the configured rules. In the assignment stage, an organization might want to first prioritize the incoming chats based on highest urgency level and importance, and then assign them to the agents by matching the skills required, current workload status, and availability.



How unified routing helps achieve business efficiency

Unified routing optimizes businesses in the following ways:

- Connecting end-customers with the best-suited agent to provide the right outcome upon first contact.
- Routing work items to the best queue by using attributes in a related entity, thereby saving an admin from creating a custom workflow.
- Using skills-based routing to automatically assign incoming work, matching to the best agent and decreasing resolution time.
- Adding more context to the incoming work item using conditions on work item attributes and related-entity attributes, and then further using that information to route to a particular queue and also while assigning to the right agent.
- Using machine-learning models to predict skills and assigning incoming work items to the best agent using skills to avoid writing manual declarative skill-identification rules.
- Prioritizing work items within a queue using work item attributes, added context, or related entity attributes so as to ensure the business is able to use the agent's time on the most important work items first as per the business need.
- Assigning work items within a queue by matching agent attributes against work item requirements dynamically, thereby assigning agents as per the business requirement.

System requirements, supported geographical regions

Unified routing is supported in the same geographical regions as those supported by Omnichannel for Customer Service. More information: International availability of Omnichannel for Customer Service

The requirements for unified routing are same as those that are applicable for Omnichannel for Customer Service. More information: System requirements for Omnichannel for Customer Service

For the languages that are supported in unified routing, see Supported languages.

You can configure unified routing only through the Customer Service admin center, Omnichannel admin center, and Customer Service Hub apps. Agents must use the Customer Service workspace or Omnichannel for Customer Service app only to be assigned work through unified routing.

The intelligent skill finder depends upon the custom AI Builder category classification model. Therefore, AI Builder should be available in the geographical region where you want to use intelligent skill finder. The languages supported in the intelligent skill finder are determined by the languages that AI Builder supports. For more information, see the following:

- Availability of AI Builder
- Supported languages

> **Note**
>
> Unified routing is not supported in Unified Service Desk.

See also

How routing and assignment works
Create workstreams for unified routing
Set up record routing
Configure work classification rulesets
Historical analytics for Unified routing in Customer Service
Historical analytics for unified routing in Omnichannel for Customer Service
FAQ on unified routing
Migrate workstreams created in Omnichannel Administration app

Export and import configuration data for the record channel

Export import data for the live chat channel

How to set up unified routing

Article • 11/18/2022

Introduction

You can set up unified routing in Customer Service Hub or Omnichannel admin center.

Typically, you'll use Customer Service Hub to set up routing of records, such as case.

You'll use Omnichannel admin center to route work items that come through different channels, such as live chat or Microsoft Teams.

In this article, we'll take you through the high-level process of configuring unified routing in both the apps.

> ⓘ **Note**
>
> We recommend that you familiarize yourself with the UI because you'll perform the steps and procedures on different pages.

Prerequisites

The following prerequisites are applicable:

- The latest release of Customer Service must be installed. More information: What's new in Customer Service
- The System Administrator role to set up unified routing for records and work items.
- To route records, you must enable the record for routing using the records channel configuration. More information: Records routing

Set up unified routing for records in Customer Service Hub

The sequence of the tasks that you'll need to perform for setting up unified routing are outlined in the following table.

Step	Task	Description

Step	Task	Description
1	Provision unified routing for Customer Service	Turn on unified routing in Service Configuration Settings.
2	1. Create users in Microsoft 365 admin center 2. Set up the user as a bookable resource	Create users in Microsoft 365 and configure them in Customer Service.
3	Create and manage queues for unified routing	Set up queues in advanced queues section and add users.
4	Set up unified routing for records	Configure a record for routing.
5	Create workstreams for record routing	Configure a workstream for record routing
6	Enable routing diagnostics	Turn on routing diagnostics

Try the runtime experience in Customer Service workspace

Make sure that you have the Customer Service Representative role to try the runtime experience and do the following:

1. Perform the steps in Create a case.
2. Go to the case details page, and select **Save & Route** on the window.

Set up unified routing for channels in Omnichannel admin center

The high-level process to set up unified routing for a channel is as follows.

Step	Task	Description
1	1. Create users in Microsoft 365 admin center 2. Set up the user as a bookable resource	Create users in Microsoft 365 and configure them in Customer Service.

Step	Task	Description
2	Create a workstream for unified routing	Create a workstream for routing conversations
3	Create and manage queues	Configure queues for conversations
4	Configure routing rules	Configure routing rules for conversations
5	Configure assignment rules	Configure assignment rules for routing conversations.

Additional settings

Optionally, you can configure the following settings.

Task	Description
Configure and publish the skill model to use machine learning work classification. More information: Set up intelligent skill finder model	To route records and work items from channels
Configure capacity profile to use capacity profile-based classification. More information: Create and manage capacity profiles	To route records and work items from channels

See also

Overview of unified routing
Set up unified routing for records
Set up skill-based routing
Manage capacity profiles
Migrate workstreams created in Omnichannel Administration
Export and import configuration data for the record channel
Export import data for the live chat channel
FAQ on unified routing

Create and manage workstreams

Article • 05/05/2023

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

A workstream is a container to enrich, route, and assign work items, and can be associated with a channel, such as live chat, voice, or case.

The workstream can belong to multiple channels of the same type, like multiple chat channels. In this case, all the conversations from these channels inherit the routing and work assignment settings of the workstream they belong to.

The workstream can be one of the following types:

- **Messaging**: To route conversations from live chat, SMS, social, and Microsoft Teams channels.
- **Record**: To route records, such as case, email, and activity.
- **Voice**: To route calls made to support numbers listed on the customer portal. More information: Introduction to the voice channel

> **ⓘ Important**
>
> - Unified routing must be enabled in the service configuration settings in Customer Service Hub for records to be routed using unified routing. More information: **Provision unified routing**
> - Workstreams that you created in the Omnichannel Administration app can't be modified in the Omnichannel admin center app. You'll need to migrate the existing workstreams and then manage them in the Omnichannel admin center app. More information: **Migrate workstreams created in Omnichannel Administration**

Create a workstream

You can create workstreams for unified routing in the Customer Service admin center, Omnichannel admin center, or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps:

   Customer Service admin center

   - In the site map, select **Workstreams** in **Customer support**.

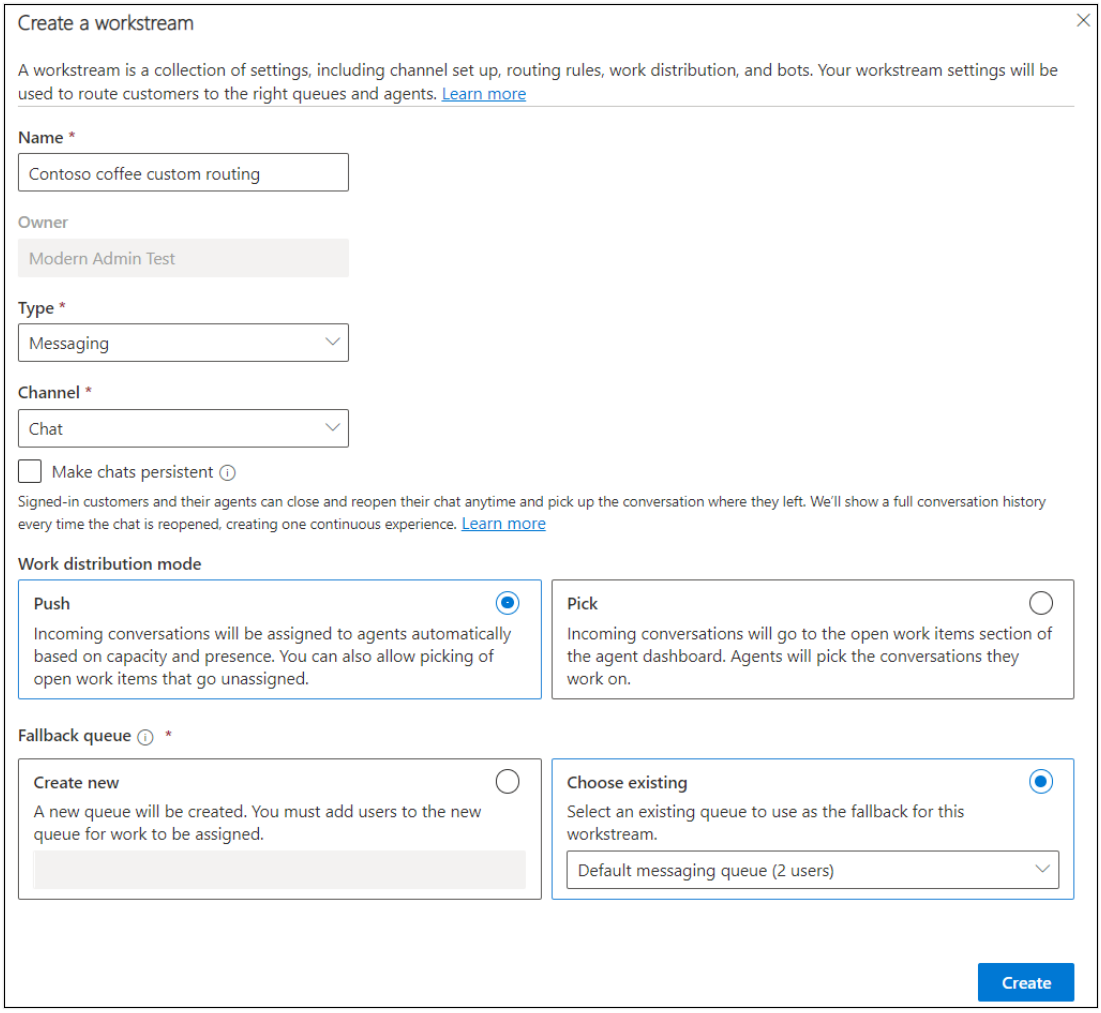
2. Select **New workstream**.

3. In the **Create a workstream** dialog, enter the following details:

   - **Name**: Enter an intuitive name, such as **Contoso chat workstream**.
   - **Type**: Select one of the following types:
     - **Messaging**
     - **Record**
     - **Voice**
   - **Channel**: This box appears if you've selected the type as **Messaging**. Select a channel from the list. If you select **Chat**, the **Make chats persistent** checkbox appears. Select the checkbox if you want to configure persistent chat. Also make sure that you select **Keep same agent for entire conversation** in the **Work distribution** settings of the workstream. More information: Configure persistent chat
   - **Record**: This box appears if you've selected the type as **Record**. Select the record from the list. More information: Set up record routing
   - **Work distribution mode**: Select **Push** or **Pick**. You can't edit this setting later.
     - In **Push** mode, a work item is dispatched to agents automatically using a message alert. You can configure the push work item to be explicitly picked up. For voice, only push mode is available.
     - In **Pick** mode, a work item is dispatched to agents when they explicitly pick the work item from the **Open work items** in the agent dashboard.
   - In **Fallback queue**, select one of the following options:
     - **Create new**: Enter a queue name to which work items will be sent when no queue is identified in the the route-to-queue rules. You'll need to add users to the queue after creating the workstream.
     - **Choose existing**: Select an existing queue from the dropdown list. By default, the out-of-the-box queue for the selected channel type is

selected.

More information: Fallback queues



4. Select **Create**. The workstream that you created is displayed with the option to configure the selected channel instance.

5. Perform the steps outlined in one of the following sections depending on the channel that you've selected.

   - Configure a chat widget
   - Configure a voice channel
   - Configure a Facebook channel
   - Configure a WeChat instance
   - Configure a LINE channel
   - Configure a WhatsApp channel
   - Configure a Microsoft Teams channel
   - Configure an SMS channel using Azure Communication Services
   - Configure an SMS channel for TeleSign
   - Configure an SMS channel for Twilio
   - Configure a custom messaging channel

- Configure record routing

> **Note**
>
> If asynchronous plug-ins are installed but disabled in your organization, ensure that you set the value of "DisabledForAsyncProcessing" to "No" to avoid issues when you're creating workstreams.

Configure routing rules

Routing rules for a workstream consist of work classification rules and route-to-queue rules. To learn about configure routing rules, see the following articles:

- Configure work classification rules
- Configure route-to-queue rules

Configure work distribution

In the **Work distribution** area of a workstream, you can either accept the default settings or select **See more** and update the following options:

- **Auto-close after inactivity**: Select a time period after which inactive conversations will be moved to the closed state automatically. This option is available for only persistent chat, SMS, social, and Microsoft Teams channels.
- **Work distribution mode**: The option that you selected in step 3 is displayed and can't be edited.
- **Capacity**: Select one of the following options. More information: Create and manage capacity profiles
  - **Unit based**: Enter a value if your organization has configured unit-based capacity.
  - **Profile based**: Specify a profile in the list if your organization has configured profile-based capacity.
- **Block capacity for wrap up**: Select a duration to block capacity when the agent is in **Wrap-up** state, such as **1 minute** or **60 minutes**. After the specified duration, agent capacity is released and presence is automatically reset. By default, **Always block** is selected, where agent capacity is blocked as long as the conversation is in **Wrap-up** state. You can also select **Don't block**, where agent capacity is released immediately, when the conversation moves to the **Wrap-up** state.

> **Note**
>
> If you've selected **End of Day mode** in capacity profile, agent capacity won't be reset when the duration selected in the **Block capacity for wrap up** field is over.

- **Allowed presences**: Select the presences in which agents will be assigned.
- **Default skill matching algorithm**: Select **Exact Match**, **Closest Match**, or **None**.
- **Keep same agent for entire conversation**: Set the toggle to **Yes** if you want the conversation to remain assigned to the originally assigned agent. More information: Agent affinity

Configure advanced settings

For a selected workstream, expand **Advanced settings** to configure the following options:

- Sessions
- Agent notifications
- Context variables
- Smart assist bots
- Quick replies

Add a bot to a workstream

To add a bot to a workstream, the bot must be configured and available for selection.

For Power Virtual Agents bots, see Connect omnichannel to your Power Virtual Agents bot. For Azure bots, see Integrate Azure bots with Omnichannel for Customer Service.

To add the bot to the workstream

1. In Customer Service admin center or Omnichannel admin center, go to **Workstreams**, and select a workstream.
2. For the selected workstream and channel, in the **Bot** area, select **Add bot**.
3. In the **Add a bot** dialog, select the required bot from the **Name** dropdown list, and then select **Save and close**.

When a work item needs to be assigned, the classification rules are run and the work distribution system checks and routes the work item to the bot, if the selected

workstream has a bot. After a bot is added to the workstream, the incoming work item is first routed to the selected bot at runtime.

> ⓘ **Note**
>
> - Bots can receive conversations only if they're added to push-based workstreams.
> - We recommend that you don't add bots to workstreams that are meant for record routing.

Manage workstreams

You can manage workstreams on the workstreams page of any of the Customer Service admin apps.

Select a workstream to perform any of the following actions:

- **Edit**: Lets you edit the workstream, such as add a new channel or update the existing settings.
- **Copy**: Lets you create a copy of the workstream with all the properties, such as the rules, so that you can reuse the configured workstream in another organization. The copied workstream name is prefixed with "Copy of "`<workstream>`.
- **Delete**: Lets you delete the workstream if you no longer need it in your organization. You can't delete workstreams that are used in intake rules for record routing. You'll be prompted to remove the dependencies and then try to delete the workstream.
- **Fallback queue**: Select an existing queue or create a queue to set as the fallback queue. More information: Fallback queues

Agent affinity

The agent affinity feature ensures that work items are assigned to the agents based on their work history. Agent affinity ensures that conversations are automatically reassigned to the same agent, irrespective of the agent's capacity and presence.

The feature is enabled by default for persistent chat, SMS, social channels, and Microsoft Teams. In these channels, when a conversation moves from the waiting to active state, it might not get assigned to the same agent who had previously handled it. You can set the **Keep same agent for entire conversation** toggle to **Yes** when you configure the work distribution for the workstream to reassign the conversation to the agent. This

helps save the effort to reorient the agent or set the context about the customer issue again.

However, for live chat, there's no waiting state. So, when the state of the conversation changes from active to open state, it'll be reassigned to the same agent. The agent can, however, choose to reject the assigned conversation via the notification pane.

> **Note**
>
> Agent affinity is applicable only for push type of work distribution.

Associate templates

You can keep the default templates for sessions and notifications or update to use custom templates. More information: Associate templates with workstreams

See also

Configure persistent chat
Set up record routing
Configure routing for email records
Manage users in Omnichannel for Customer Service
Create workstream for entity record routing in Omnichannel Administration
Work with queues
Automatically identify customers using pre-chat responses

Create and manage queues for unified routing

Article • 10/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

In Customer Service, queues are used to collect and distribute workload among agents. Workload includes records such as cases, and conversations such as chat or SMS. Agents are added as members to the queues and the workload is distributed among the agents based on assignment methods.

How work items are routed to queues

You can create separate queues for each line of business such as billing, investment, and products. When a customer query is raised for any of the areas, it's routed to the corresponding designated queue based on how you define route to queues in the classification. You can also set up a customer support availability matrix by using a combination of queues, operating hour schedules, and routing rules.

In an enterprise scenario, you can have various supervisors handling different issues, and therefore, different types of queues are required to handle the various scenarios. Accordingly, routing rules are set up based on the complexity of issues that need to be handled.

To simplify the routing experience for administrators and supervisors, queues are categorized based on the channel types as follows:

- **Messaging**: To route all messaging conversations pertaining to the live chat, SMS, and social channels.
- **Records**: To route work items pertaining to records, such as cases and emails.
- **Voice**: To route calls made to support phone numbers listed on the customer portal.

The queue types allow issues to be routed correctly and help avoid cross-queue assignments. When you configure workstreams and routing rule items, the queues that

are available for selection are based on the channel type for the workstream. For example, for routing rules for a live chat workstream, only messaging type queues are shown for selection. Similarly, you can transfer a chat conversation only to a messaging queue, and a case only to a record queue.

Assign a group number that helps you organize your queues in the list view. The group number doesn't affect the priority of the queue or incoming conversations.

Create a queue for unified routing

1. In Dynamics 365, go to one of the apps, and do the following steps:

   Customer Service admin center

   a. In the site map, select **Queues** in **Customer support**.

   b. On the **Queues** page, select **Manage** for **Advanced queues**.

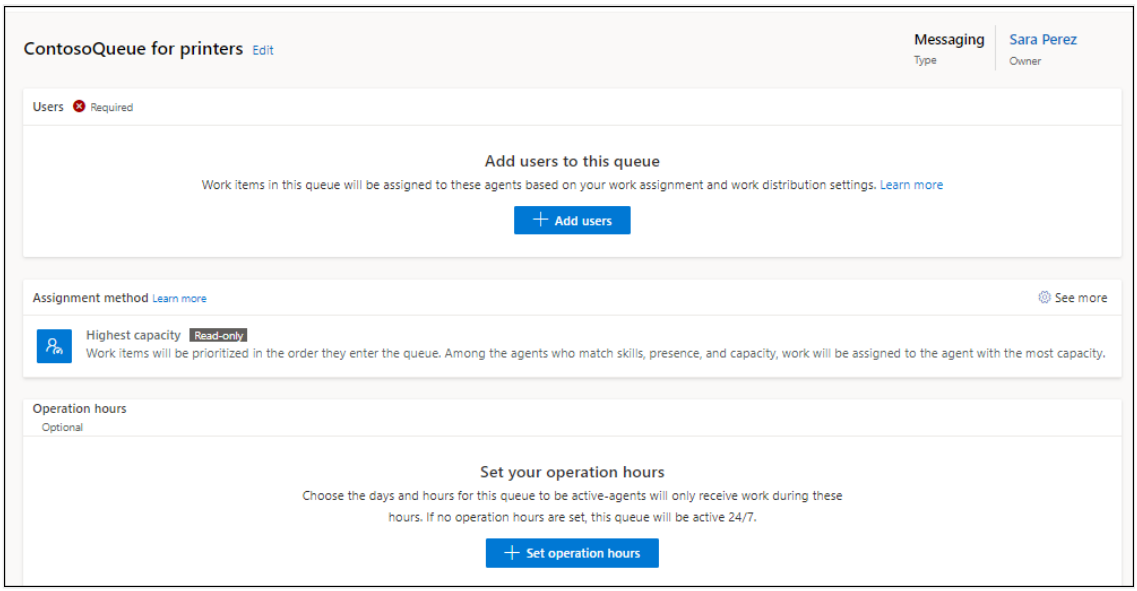
2. On the **Queues** page, do the following steps:

   a. Select **New**.

   b. In the **Create a queue** dialog, enter the following details:

   - **Name**: A name for the queue.
   - **Type**: Select **Messaging**, **Record**, or **Voice**.
   - **Group number**: A number to organize the queue.

   c. Select **Create**. The queue that you created is displayed.



3. Select **Add users**, and in the flyout menu, select the users who should be part of the queue, and then select **Add**. The users are added to the queue.

4. In **Assignment method**, select any of the following options:

    - **Highest capacity**: Assigns a work item to an agent with the highest available capacity. This agent has the skills that are identified during the classification stage and presence that matches one of the allowed presences in the workstream.
    - **Advanced round robin**: Assigns a work item to the agent who matches the criteria for skills, presence, and capacity. The initial order is based on when a user is added to the queue. Then, the order is updated based on assignments.
    - **Least active**: Assigns a work item to the agent who has been least active among all the agents who match skills, presence, and capacity.
    - **Create new**: Lets you create a custom assignment method. The custom assignment method lets you use your own rulesets and rules to configure priority, severity, and capacity for choosing the queues to which work items need to be routed by setting up the rulesets for prioritization and assignment. For more information about the custom assignment method, see Create custom assignment method.

5. To manage overflow of queues, in **Overflow management**, select **Set overflow conditions**, and perform the steps described in Manage overflow of queues.

6. To set the operating hours, in **Operation hours**, select **Set operation hours**. If you don't set operation hours, the queue is considered to be available round the clock. You must configure the operating hour record before you can set it for the queue. More information: Configure operating hour record

7. On the **Set operation hours** dialog that appears, select an operating hour record in the **Name** list.

8. Select **Save and close**. The operating hour record that you selected is configured for the queue.

Manage queues for unified routing

You can manage queues on the **Queues** page, and perform operations such as search, edit, copy, and delete the queues.

- Select a queue to edit the users, assignment methods, or operating hour record.

- Select a queue on the **Queues** page, select **Copy** on the command menu, and then select **Copy** in the *<queue_name>* dialog. The queue is copied and inherits the settings of the queue you copied from, including its name, prefixed with **Copy of**.

> **Important**
>
> If unified routing is enabled, make sure that the **Queue** form, which is the default form, exists and hasn't been removed through customization. Otherwise, you aren't able to create a basic queue in Customer Service Hub.

How fallback queues work

To efficiently manage the work items, you can configure a fallback queue per workstream that acts as a safety net. You can set an existing queue as the fallback queue or create a fallback queue with the required settings when you're creating a workstream.

For existing workstreams, you can configure the fallback queue on the workstream page. If you choose to create a queue, you need to add users. By default, the assignment method for the fallback queue is highest capacity.

If any overflow settings exist, they are overruled and work items are routed to the fallback queues in the following scenarios:

- Work item encounters an error during classification.
- Work item encounters an error when running a route-to-queue rule.
- Work item doesn't match any route-to-queue rules.

How default queues work

Default queues are a finite set of system-defined queues that help you manage work items when other queues aren't available for routing them. All agents who have the Omnichannel agent role are a part of the default queues. Out of the box, the following default queues are available:

- **Default entity queue** for routing entity records.
- **Default messaging queue** for routing all messaging conversations pertaining to live chat, SMS, Microsoft Teams, and social channels.
- **Default voice queue** for routing all voice calls.

For a workstream, you can set any queue as a fallback queue, including a default queue but vice versa isn't possible. You can update the assignment method only for the default queues. However, we recommend that you always create advanced queues and define

the assignment strategy instead of using the default queues. No other settings are available to edit.

See also

Create and manage workstreams
Create and manage assignment methods
Create and manage operating hours
Configure the voice queues
FAQ about time taken by configuration changes in unified routing

Configure work classification rulesets for unified routing

Article • 04/26/2023

In unified routing, work classification lets you define rules to add detailed information to incoming work items that can be used to route and assign the work items optimally.

Typically, rules are written in the format of "if defined condition satisfies, then set the output attributes to certain values," but can also be surfaced through machine learning models. They are optional and can be used to add additional information to the incoming work items that are then used for more precise routing and assignment.

Work classification rules can be written by using the logical declarative decision list or by using machine learning models.

> **Important**
>
> You can create 10 rulesets per workstream, and for each ruleset, you can create up to 100 rule items.

How classification rulesets work

A classification ruleset is an ordered list of multiple work classification rulesets and route-to-queue ruleset. During evaluation, the work classification rulesets are run first, followed by route-to-queue ruleset.

The work classification rulesets will be run in the order they are listed. Within a ruleset, rule items will be run in the order they are listed. As soon as one of the rule item conditions matches the output section of the rule item is run, and the system evaluates the rules in the next ruleset if it is configured.

After all the work classification rulesets have been run, the system evaluates the route-to-queue ruleset in which all the rule items will be run in the order they are listed. This is unlike the classification rules, where control passes to the next ruleset when one of the rule items in a ruleset condition matches.

In work classification rulesets, the values set in one of the rule items of a ruleset can be used in the next rulesets' rule items. For example: If in output section of one of the rule items of ruleset 1, priority is set to High; then any next ruleset rule item can use the

priority variable and corresponding value "High" to set value for another attribute, such as, "If Priority equals High, set severity to critical".

For a rule item, you can set the output values for up to five attributes.

Prerequisite

You need the CSR Manager or Omnichannel administrator role to configure the work classification rules for a workstream.

Create work classification rulesets

Logical classification rules are run to update work item attributes. They are written in the format of "if defined condition satisfies, then set the output attributes to certain values." You can create conditions to define rules based on multiple entity attributes. Routing rules are written as rulesets that consist of rule items.

To create a logical work classification ruleset, do the following steps:

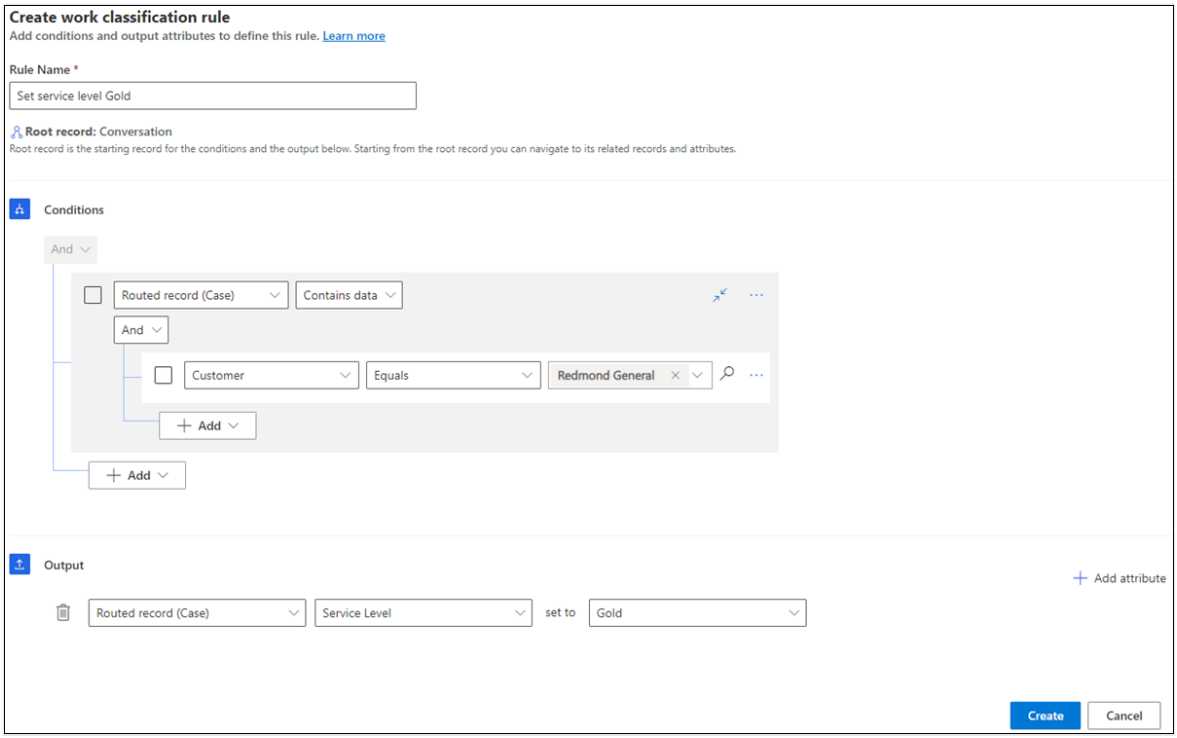
1. In Customer Service admin center or Omnichannel admin center (deprecated), select a workstream, and in the **Routing rules** area, for the **Work classification (optional)** option, select **Create Ruleset**.

2. On the **Work classification** page, select **Create new**, and in the **Create work classification ruleset** dialog, select **Logical rules** in **Rule type**, and enter a name and description. By default, the root record is selected and displayed at the top of the condition builder for ease of reference and visibility of the record for which you are creating the rule.

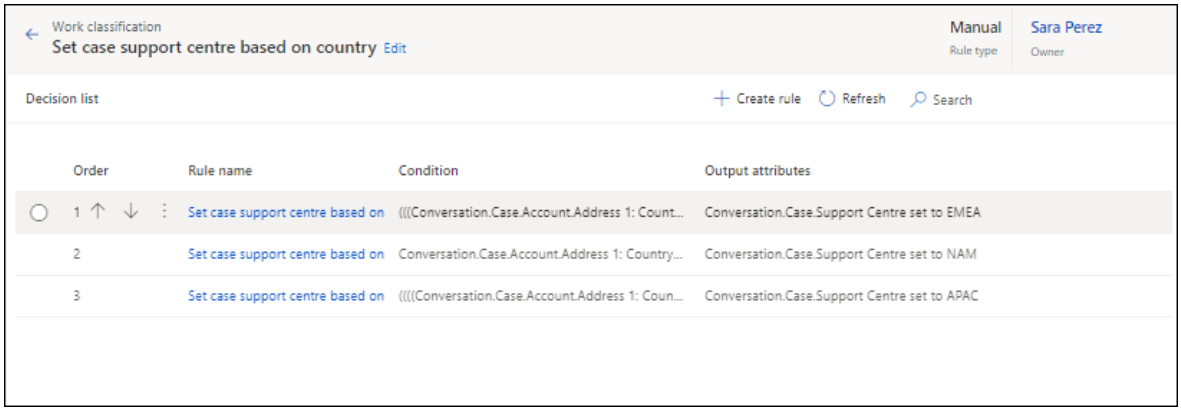
3. In the **Decision list** area, select **Create Rule**, and on the **Create work classification rule** dialog, enter a name.

4. In the **Conditions** area, define the conditions according to your business needs. If you are creating classification rules for records, then the top-level condition is automatically populated. You can define conditions for up to two levels of the related records and attributes.

5. In the **Output** area, select the attribute for which value needs to be set if the conditions are met.



6. Repeat steps 3 through 5 to create the demand rules.



Create logical skill classification rulesets

Skill attachment rules are a sub-type of logical work classification rules and are defined to attach skills to the work item. They are written in the format of "if defined condition satisfies, then attach defined skills to the work item."

Follow these steps to create a logical skill classification ruleset:

1. For the selected workstream, in the **Routing rules** area, for the **Work classification (optional)** option, select **Create Ruleset**.

2. On the **Work classification** page, select **Create new**.

3. In the **Create work classification ruleset** dialog, select **Logical rule** in **Rule type**, and enter a name and description.

4. Select **Create Rule**, and on the **Create work classification rule** dialog, enter a name.

5. In the **Conditions** area, define the conditions as per your business needs:
   a. Select **Add row**, and select **Skills** from the list box.
   b. Select the required operator, and then select the skills for the condition.
   c. Repeat the steps to define any other conditions.

6. In the **Output** area, select the attribute whose value will be set if the conditions are met.

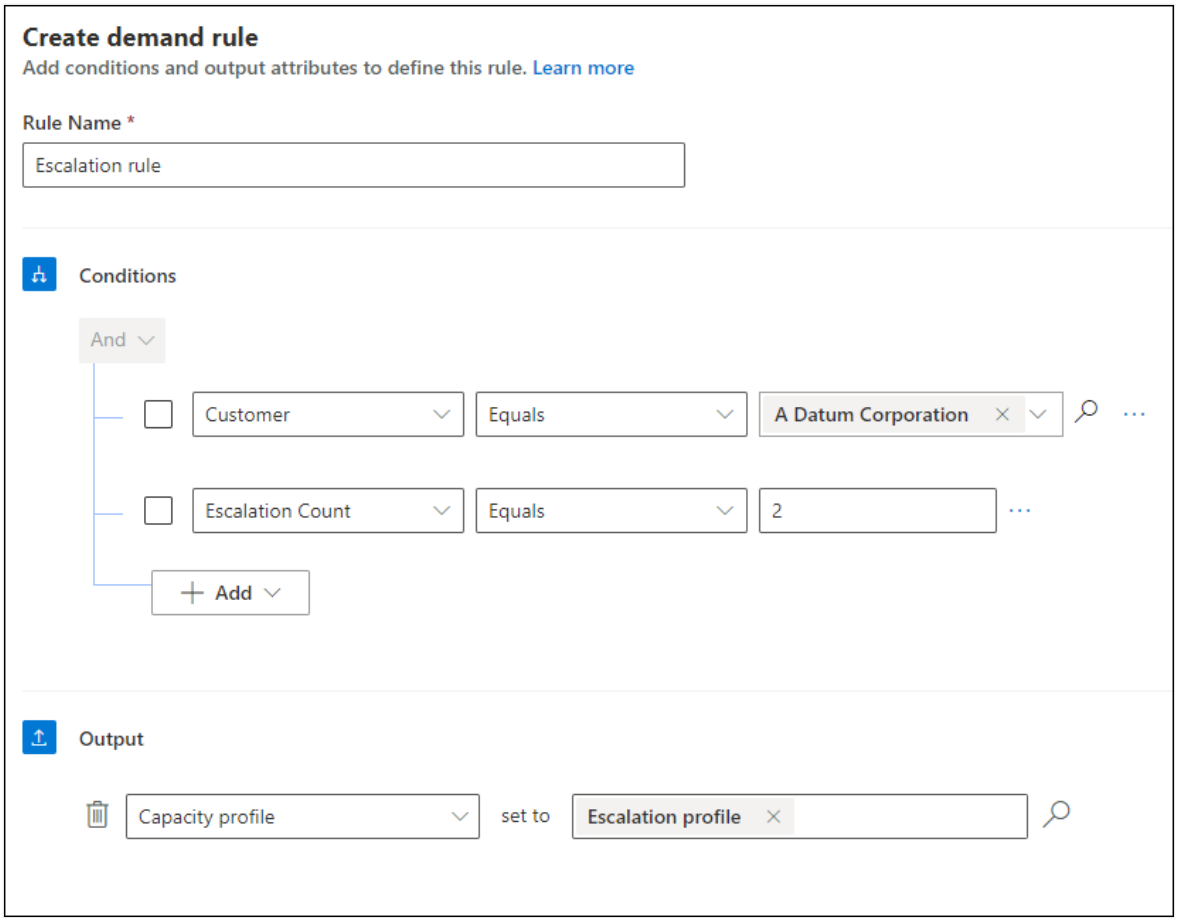
7. If you want to set up the skill attribute, in the **Conditions** area, define the conditions, and select the required value in the **Output** area for the skill that needs to be set.

> ⓘ **Note**
>
> - Ensure that the rating model that you choose for a skill in the work classification rule is same as the rating model that's defined for the skill attached to the agent. Also, ensure that you don't attach the same skill with two different rating models.
> - When you reroute a work item, new skills are appended to the existing ones if any.

Create classification rulesets based on capacity profiles

Create work classification rulesets that are based on capacity profiles to route work items to agents based on capacity.

1. Perform the steps 1 through 5 in Create logical skill classification rulesets.
2. In the **Output** area, select **Capacity profile**, and choose a capacity profile whose value should be set if the conditions are met.



Create machine learning-based skill classification rulesets

Machine learning model-based rules are a sub-type of work classification rules, and are rules defined to attach skills to the work item using the AI Builder text classification machine learning model created as part of the intelligent skill finder bootstrapping experience. They are written in the format of "send work item selected attributes to the published model and attach the returned tags from the model as skills on the work item."

To configure a skill classification ruleset by using the machine learning option, you must have configured the intelligent skill finder models. More information: Set up intelligent skill finder model

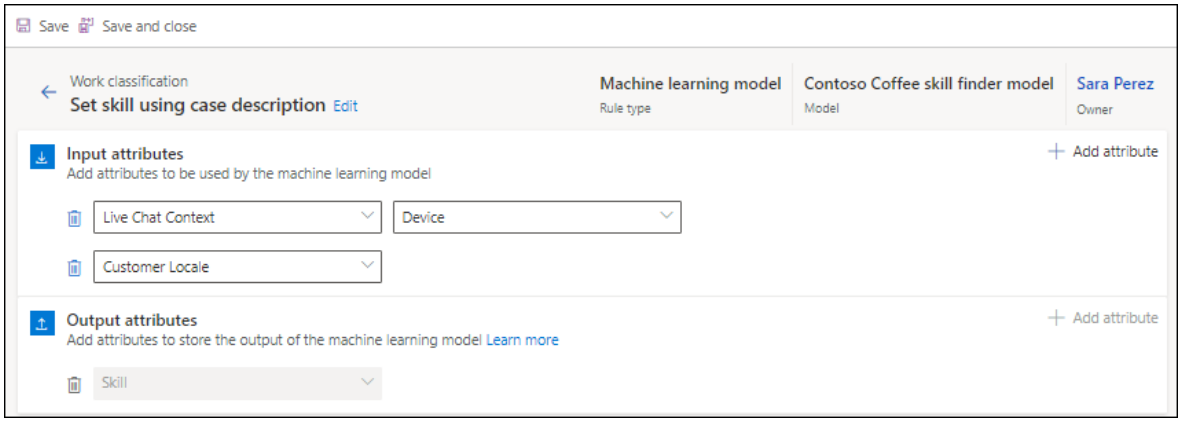
Do the following to configure a machine learning-based ruleset:

1. In Customer Service admin center, Omnichannel admin center, or Customer Service Hub, select a workstream, and in the **Routing rules** area, for the **Work classification (optional)** option, select **Create Ruleset** or **See more**.

2. On the **Work classification** page, select **Create new**.

3. In the **Create work classification ruleset** dialog, select **Rule Type** as **Machine learning model**, and enter a name and description.
4. Select a model in the **Select skill identification model** list, and select **Create**.
5. On the page that appears, in the **Input attributes** area, select **Add attribute**, and select the attributes from the **Attributes** or **Related Entities** category. For an incoming work item, these attribute values will be concatenated and sent to the machine learning model for skill prediction.

> **Note**
>
> Skill is the default selection for output attributes and can't be edited or deleted.



Create rulesets based on sentiment prediction model (preview)

> **Important**
>
> This section is pre-release documentation and is subject to change.

You can create rules that are based on the sentiment prediction model to classify work items. More information: Use sentiment prediction.

Create rulesets based on effort estimation model (preview)

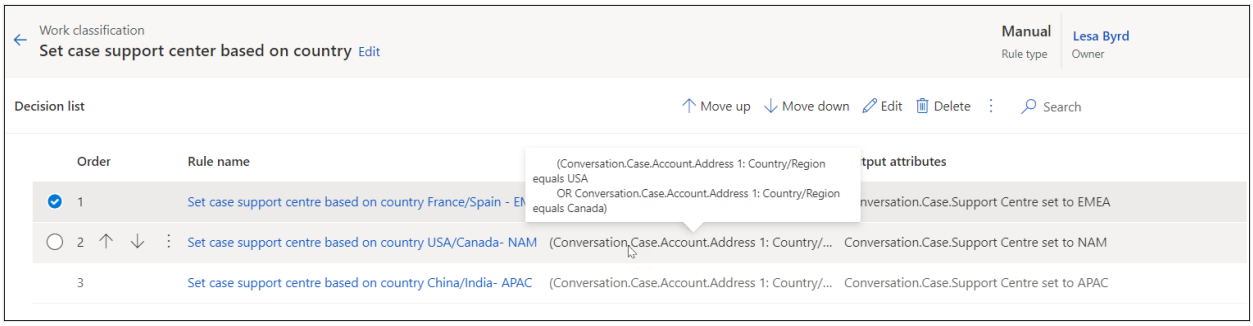
> **Important**

This section is pre-release documentation and is subject to change.

You can create rules that are based on the effort estimation model to classify work items. More information: Use effort estimation.

Options available for rulesets

After you create the rules, you can change the order in which the rules should be evaluated, search for rules, and view the condition that's been used for each rule by hovering the mouse over the condition. You can also create copies of the rules and update only the necessary information to avoid writing the conditions from scratch. You can hover the mouse over a condition to view it without having to navigate to each condition.



See also

Create a workstream for unified routing
Set up record routing

Configure route-to-queues rules for a workstream

Article • 02/24/2023

Queue routing rules send the work item to the right queue. The rules are written in the format of, "If defined condition satisfies, then route the work item to the defined queue." If no rules are defined or no rules match, then the incoming work item will be routed to the fallback queue of the respective workstream.

The route-to-queue ruleset is run after all the work classification rulesets are run.

A workstream can have only one route-to-queues ruleset.

After you configure the rules, the system matches the rule conditions, and overflow handling of the corresponding queue to assign a work item to a queue. If more than one rule matches the required condition and the corresponding queues aren't overflowing, then the queue corresponding to the first rule in the list is selected for assignment. If all the queues corresponding to the rules are overflowing, the work item is assigned to the queue that will be available first.

The routing diagnostics gives a detailed view of the matched and applied rules in the route-to-queue stage. More information: Diagnostics for unified routing

Percentage-based allocation of work to queues

To balance the workload optimally and distribute it across multiple contact center vendors, organizations can configure percentage-based routing. The routing of work items to queues is controlled using percentage allocation. Percentage-based allocation of work items is an optional setting that can be configured in the route-to-queue rules as discussed in the following section.

When you configure this feature, the system picks a queue from the available list of queues in the route-to-queue rule, as per the configured percentages. The final queue that's selected, however, is also dependent on the ruleset evaluation logic, such as queue overflow and override overflow settings.

Configure rules in route-to-queue ruleset

1. In Customer Service admin center, select a workstream.

2. In the **Routing rules** section, select **Create ruleset** next to **Route to queues**, and then select **Create Rule** in **Decision list**.

3. In the **Create route to queue rule** dialog, enter a name in **Rule Name**. By default, the root record is selected and displayed at the top of the condition builder.

4. In **Conditions**, define the set of conditions. If you're creating rules for records, then the top-level condition is automatically populated. You can define conditions for up to two levels of the related records and attributes.

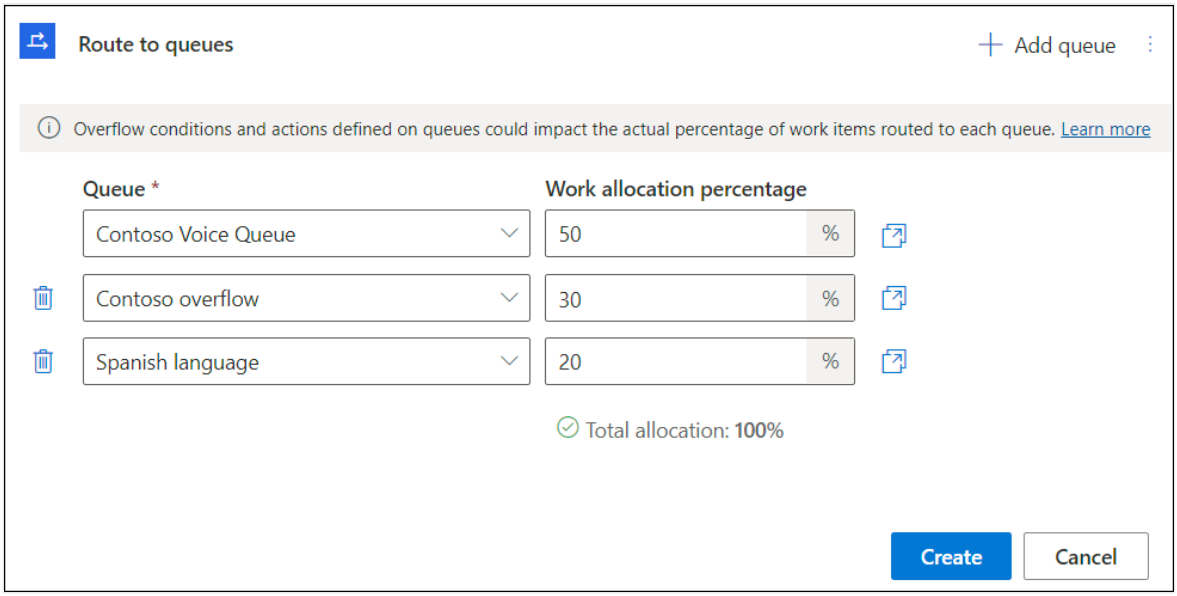
5. In **Route to queues**, select the queue to which the work items will be routed if the conditions are met.

6. To configure percent allocation, select **Add queue** and do the following:

   a. **Queue**: Select a queue in the dropdown list.

   b. **Work allocation percentage**: Enter a value that denotes the percentage of work allocation for the queue.

7. Repeat **Step 6** to define the percentage allocation for up to five queues. The total percentage allocation for all the queues should sum up to 100.



8. Use the **Remove allocations** option that's available in the **More commands** ellipses to remove the percentage-based routing. When you update the percentage-based settings, you must ensure that the allocation totals to 100.

9. Repeat **Steps 2 through 6** to define the rules to cater to your business needs.

10. Optionally, after you create the required rules, reorder them in the ruleset by selecting the arrows in the **Order** column on the **Decision list** page.

Options available for rules

The following options are available for the rules:

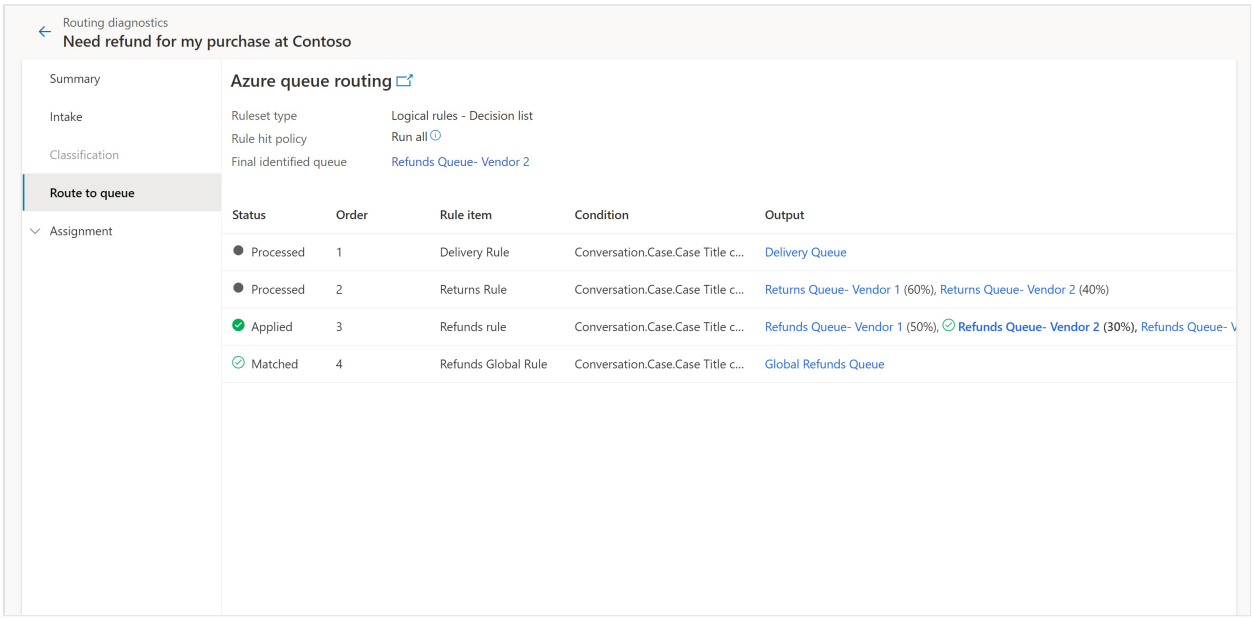
- Change the order in which the rules should be evaluated
- Search the rules
- View the condition that's been used for each rule by hovering the mouse over the condition.
- Create copies of the rules and update only the necessary information to avoid writing the conditions from scratch.

Diagnostics for percentage-based allocation

The route-to-queue stage of the diagnostics displays the following information about the rules:

- The rules that are matched.
- The final rule that's applied and the queue to which the work item is routed.

For each of the matched or applied rules, the corresponding queue is also displayed. For the percentage-based rule, the queue that's picked up from the set is highlighted.



The runtime allocation percentages might deviate slightly from the allocation that you've configured in the rules. The margins tend to be negligible as the number of work items increases.

Engagement context for asynchronous channels

You can configure routing rule conditions for the social channels, such as Facebook and WhatsApp based on the attribute values. The attributes are listed channel wise as follows:

- **Microsoft Teams**: Use the **Teams Engagement Context** entity to set a condition on the **Customer name** attribute.
- **Facebook**: Use the **Facebook Engagement Context (Conversation)** entity to set conditions on the following attributes:
  - **Customer name**: The customer name is shown in the format "first name, last name".
  - **Locale**: For a list of locales, go to Facebook developer documentation.
  - **Timezone**: Timezone is shown as a number relative to GMT, for example, “5.5”.
  - **User Page Scoped Id**: This is shown as a number string.
- **Google's Business Messages**: Use the **Google's Business Messages** entity to set conditions on the following attributes:
  - Entry point
  - Place id
  - Resolved locale
  - User device locale
- **Apple Messages for Business**: Use the **Apple messages for business** entity to set conditions on the following attributes:
  - Group id
  - Intent id
  - Locale
- **LINE**: Use the **LINE Engagement Context** entity to set conditions on the **Customer name** attribute.
- **WeChat**: Use the **WeChat Engagement Context** entity to set conditions on the following attributes:
  - Customer name
  - Gender
  - City
  - Province
  - Country
- **WhatsApp**: Use the **WhatsApp Engagement Context (Conversation)** entity to set conditions on the **Customer Phone Number** and **Customer First Message** attributes. The **Customer First Message** attribute lets you create a pre-filled message that will automatically appear in the text field of a customer chat.

- **Twitter**: Use the **Twitter Engagement Context (Conversation)** entity to set conditions on the following attributes:
  - Customer name
  - Customer screen name
  - Followers count
  - Friends count

- **SMS**: Use the **SMS Engagement Context** entity to set conditions on the following attributes:
  - Customer phone number
  - Org phone number
  - Locale
  - Provider
  - Provider display name

See also

Manage overflow conditions
Create and manage queues
Create a workstream for unified routing
Configure work classification rules
Set up record routing

Assignment methods in unified routing

Article • 10/09/2023

Use assignment methods to determine how to assign work items. You can use the out-of-the-box assignment methods or build custom assignment rules by configuring the prioritization rules and assignment rulesets.

How auto assignment works

The auto-assignment process in unified routing matches incoming work items with the best-suited agents based on the configured assignment rules. This continuous process consists of multiple assignment cycles and a default block size of work items.

Each cycle picks up the top unassigned work items in the applicable default block size and attempts to match each work item with an appropriate agent. Work items that aren't assigned to agents because of unavailability of agents or right skill match wasn't found are routed back to the queue.

The next assignment cycle picks up the next block of the top-priority items that includes new work items.

When eligible agents aren't found for the work items, the assignment cycle keeps retrying to assign the top number of default sized block items as applicable for the channel.

For digital messaging and voice, the default block size is 100 work items of top priority.

For records channel, each assignment cycle prioritizes up to 2000 work items and processes them in a block size of 500.

> **Note**
>
> Queue prioritization isn't available in unified routing.

For more information, see best practices to manage queues.

Types of assignment methods

The following assignment methods are available out of the box:

- **Highest capacity**: Assigns work item to the agent with the highest available capacity. This agent is from among those agents who have the skills that are identified during the classification stage and presence that matches one of the allowed presences in the workstream. The work items are prioritized in the first-in, first-out manner—that is, the work item that was created first is assigned first. If more than one agent is available with the same capacity, the work item is assigned based on the round-robin order of the agents whose highest capacity is the same.

  If you want to use skill-based routing and set the default skill-matching algorithm for the workstream as exact match and choose highest capacity as the assignment method, then the system filters agents using exact skill match, workstream's presence, and capacity requirements, and order the filtered agents by available capacity.

  If **Default skill matching algorithm** in the workstream is **Closest Match**, then the system filters agents based on the workstream's presence and capacity requirements and orders the filtered agents by closest match and not available capacity. More information: Closest match

  If you need to distribute work fairly among agents, then you should consider switching to a round robin assignment strategy.

- **Round robin**: Assigns a work item to the agent who matches the criteria for skills, presence, and capacity. The initial order is based on when a user is added to the queue. Then, the order is updated based on assignments. Similar to how work items are assigned in the highest capacity method, in round robin assignment, the work items are prioritized in the first-in, first-out manner—that is, the work item that was created first is assigned first.

  In scenarios when multiple agents match the work item requirement, and there's a tie in the "order by", like, multiple matched agents with the same available capacity, the system resolves the assignment using round robin based on the earliest time of the last assignment.

  For example, three agents, Lesa, Alicia, and Alan, are available with the coffee refund skill and can handle up to three chats at a time. Their last assignment time stamps are 10:30 AM, 10:35 AM, and 10:37 AM, respectively. A work item about a coffee refund arrives in the queue at 10:40 AM. With the order by set to "profile-based available capacity", all the agents at 10:40 AM have the same available capacity of 2 each. To break the tie between the agents, the system uses round robin. Therefore, the incoming chat is assigned to Lesa because her last assignment was the earliest at 10:30 AM. Later at 10:45 AM, if another coffee refund work item comes in, the system assigns it to Alicia. This is also based on the

round robin order of assignment between Alicia and Alan because their available capacities are 2 each and Alicia had an earlier assignment than Alan at 10:35 AM.

- **Most idle (preview)**: Assigns a work item to the agent who has been idle the most among all the agents who match skills and capacity.

  The assignment method uses the time since last capacity is released for a voice call to determine the agent to whom the next incoming call should be routed. For example, if two agents are configured in a queue, and both receive calls one after the other, the agent who finishes their current call first and is available is assigned the next call. The wrap-up settings that are configured for the workstream are accounted for in determining the most-idle agent. The agent presence statuses aren't used in determining the most-idle agent.

  Routing to the most-idle agent assignment strategy helps in better use of agents with a more fair distribution of work items across agents. This strategy provides higher agent satisfaction and improved customer satisfaction.

  > **ⓘ Important**
  >
  > The route to the most-idle agent feature is in preview and is available for the voice channel only.
  >
  > To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
  >
  > A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
  >
  > We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
  >
  > Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.
  >
  > This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making—and should not be used to make—decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements.

> Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

You can also create a custom assignment method to suit your business needs.

- **Create new**: Lets you create and use your own rulesets and rules to configure priority, severity, and capacity for choosing the queues to which work items need to be routed. You can create the following rulesets:
  - **Prioritization rulesets**: Lets you define the order in which the work items are assigned to agents when they're available to take more work.
  - **Assignment rulesets**: Represent a set of conditions that are used to select agents and use an order by option to sort the matching agents.

> ⓘ **Important**
> - You must configure presence, capacity, and skill-matching rules in the custom assignment method because the default settings defined for the workstream won't be used in custom assignment method.
> - The out-of-the-box assignment strategies don't consider the agent operating hours. You must write a custom assignment method by using the "is_working" operator in the rule definition.

Assignment cycle

Assignment cycle is prioritization of work items, their selection, and their assignment to the best-suited agent based on the assignment rules. Unified routing optimizes the assignment cycles across the multiple queues in the organization for best performance.

The assignment cycle starts with one of the following triggers:

- Arrival of a new work item in the queue.
- Change to agent presence.
- Updates to agent capacity.
- Addition of an agent to the queue.

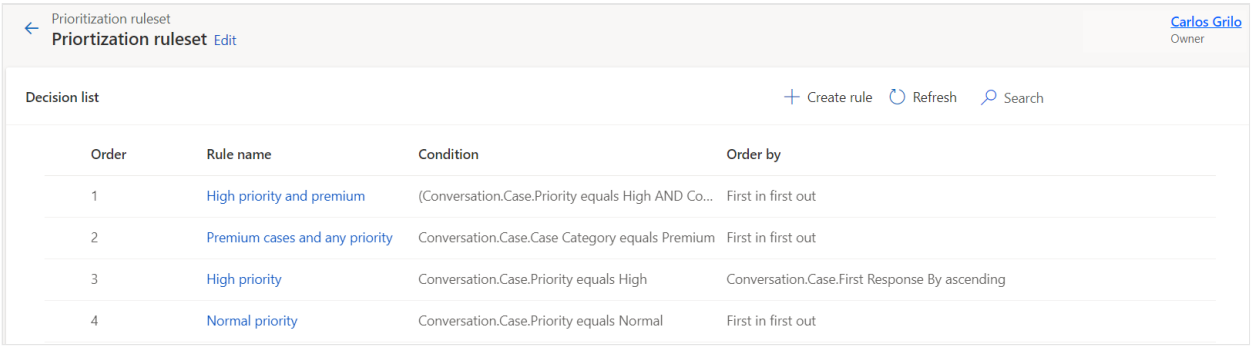
- Periodic trigger every five minutes for record type of work item.

How prioritization rulesets work

A prioritization ruleset is an ordered list of prioritization rules. Every prioritization rule represents a priority bucket in the queue. In a prioritization rule, you can specify a set of conditions and order by attributes. During evaluation, the prioritization rules are run in the order they're listed. For the first prioritization rule, the work items in the queue that match its conditions is put in the same priority bucket. In the priority bucket, the items are further sorted by the order specified in the prioritization rule. The second rule runs on the rest of the items in the queue, to identify the next priority bucket, and sort that bucket by the order by attribute until all rules are evaluated.

You can create only one prioritization ruleset per queue.

As an example, consider the prioritization ruleset as seen in the following screenshot with four rules.



- During any assignment cycle, this prioritization ruleset runs, and the rules within the ruleset run in the order they're listed.

- The first rule, "High priority and premium," finds all work items in the queue where the associated case priority is "High" and the case category is "Premium". The system creates the top priority bucket with those work items and sorts them in the "First in and first out" manner as specified in the **Order by** attribute. The first work item to be assigned from the queue is the oldest item in this bucket.

- The next priority bucket is the work items where case category is "Premium". The work items with "Premium" case category and "High" priority have already been put in top bucket as per the preceding rule, so this rule only considers other work items with "Premium" case priority. The **Order by** attribute in this case also is "First in and first out".

- The next priority bucket consists of work items where case priority is high and they haven't been bucketed already. Here the work items are ordered by their "First

Response By" field in the ascending order—that is, the work items that require the first response at the earliest are prioritized first.

Some important points about prioritization rules are as follows:

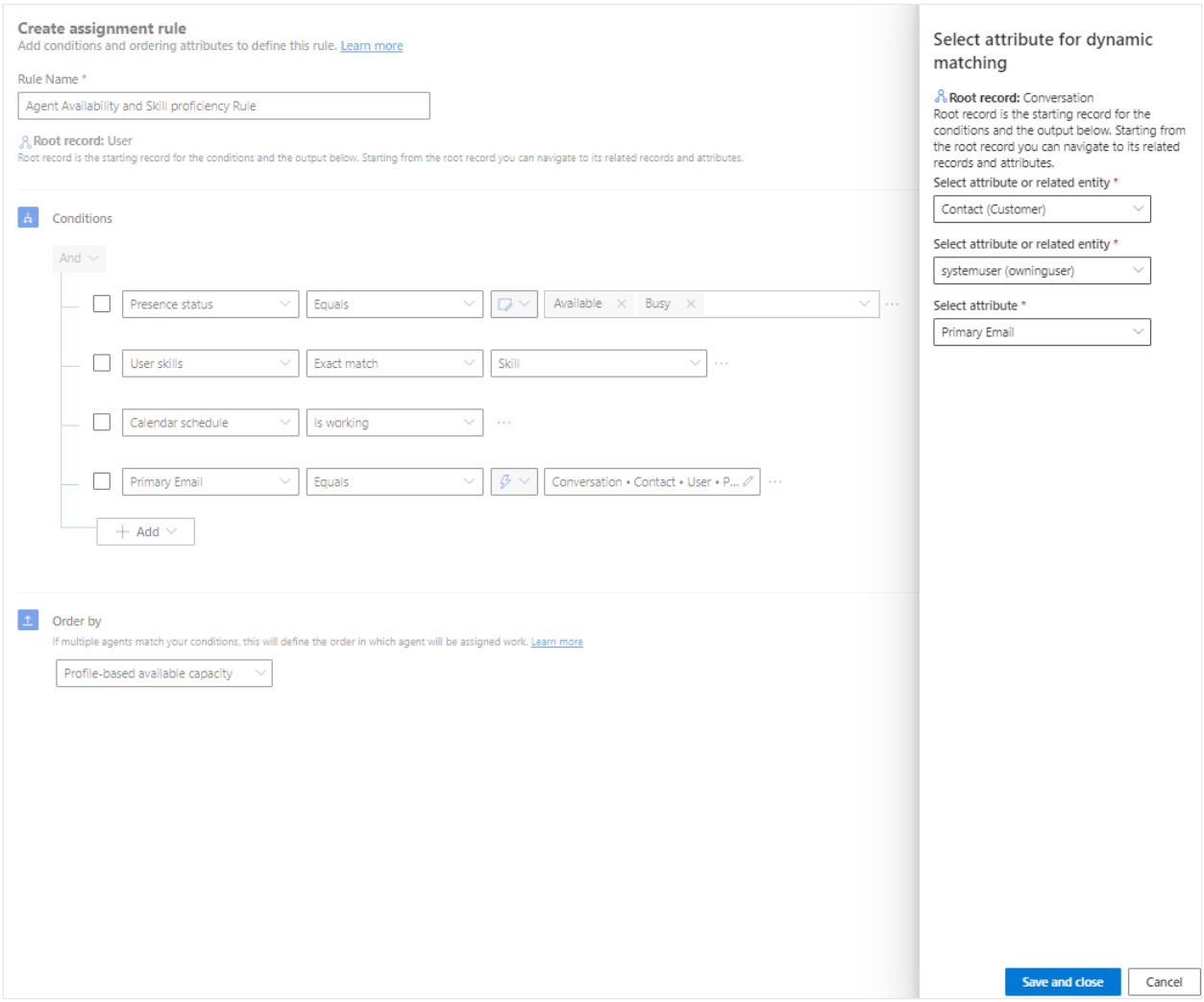
- You can create only one prioritization ruleset per queue.
- Prioritization rules are run during every assignment cycle. If you change any attributes of the work item, such as the priority of the case, that change is considered during the next assignment cycle.
- By default, the queue is sorted on a "first in and first out" manner. If you don't create a prioritization rule, then the oldest work item is assigned first.
- In normal scenarios, when a sufficient number of agents are available to take up the work items, the processing period is a couple of seconds only. The agents are assigned work items in the priority order. However, if work items pile up because of fewer eligible agents, and then an agent becomes available during the processing period, the agent is offered the next work item according to the priority order. This strategy might create a perception that the highest priority item wasn't assigned; especially after some top-priority items are attempted for assignment and yet remain in the queue.
- The work items that don't match the criteria of any of the prioritization rulesets are kept in the last priority bucket, and are ordered by "first in first out".
- Prioritization rules are skipped for affinity work items and such work items is assigned before other work items in the queue. For information about affinity, go to Agent affinity.

How assignment rulesets work

The assignment ruleset is an ordered list of assignment rules. Each assignment rule represents a set of conditions that is used to determine the agents to select and an order-by field to sort the matching agents. At runtime, the assignment rule with the top order is evaluated first. The agents are matched as per the conditions specified in the rule. If more than one matching agent exists, they're sorted by the order by field, and the top agent is assigned the work. If no agents are matched, then the next assignment rule in the ruleset is evaluated. This method can be thought of as a gradual relaxation of constraints in the assignment, such that first, the strictest criteria are applied, and then the conditions are reduced so that the best agent is found. If no matching agents are found, then the work item remains in the queue.

In the assignment rule, the system user attributes are matched with the requirement of the work item. When you select static match, the condition is formed on the System User entity attribute and static values. When you select dynamic match, the conditions

on the left are based on the system user root entity and the conditions on the right are based on the conversation root entity. You can drill down to two levels on the conversation root entity to form the rule conditions. An assignment rule with the dynamic match and static match is as follows.



Components of an assignment rule

The assignment rules are composed of the following items:

- **Order**: Specifies the order in which the assignment rule is evaluated in a ruleset. The lower-order rules are run first. If any rule results in matching a user, then the next set of rules isn't evaluated.
- **Name**: The unique rule name.
- **Condition**: The expressions that are evaluated to match the users with the attributes of incoming work. The conditions have three parts:
  - **User attribute**: Properties of the users that can be used for comparing the user with the incoming work. The user attributes can be one of the following:
    - **Select attributes on the System User table.**

- **Presence Status**: Maintained by the unified routing service based on user workloads and manual selection.
- **Capacity**: Maintained by the unified routing service based on user workloads and manual selection.
- **User skills**: Represents the skills associated with the user that can be used for doing skill-based assignment.
- **Calendar Schedule**: Schedule of the user as represented in the user service scheduling calendars.
- **Bot attributes**: Can be used only when you have configured bots as users and want to do some comparisons on them.

- **Operators**: Define the comparison relationship between the User attribute and incoming work item attributes.

  Unified routing filters the attribute-specific operators for you to choose from. Some special operators that are available for the attribute types are as follows.

Attribute type	Operator	Definition
Presence Status	Equals, Does not equal, Contains data, Does not contain data	Use an operator to find agents who have matching presence status as specified in the work item.
Capacity	Equals, Does not equal, Contains data, Does not contain data	Use an operator to compare if the agent has enough capacity to work on the specified items.
User skills	Exact match	Use an operator to find agents who have all the skills which the incoming work item requires.
User skills	Custom match	Use the operator to find agents whose skills match at runtime based on the selected lookup attribute on the work item.
Calendar schedule	Is working	Use this operator to find agents who are working as per their service scheduling calendars.

- **Value**: The user attributes are compared against this value to find the right agent. The value can be static, such as Address 1: County equals "USA". The value can also be dynamic, so that you can compare the user attribute dynamically with the values on the work item. In dynamic values, you can select any attribute on the work item or related records. For example, the following

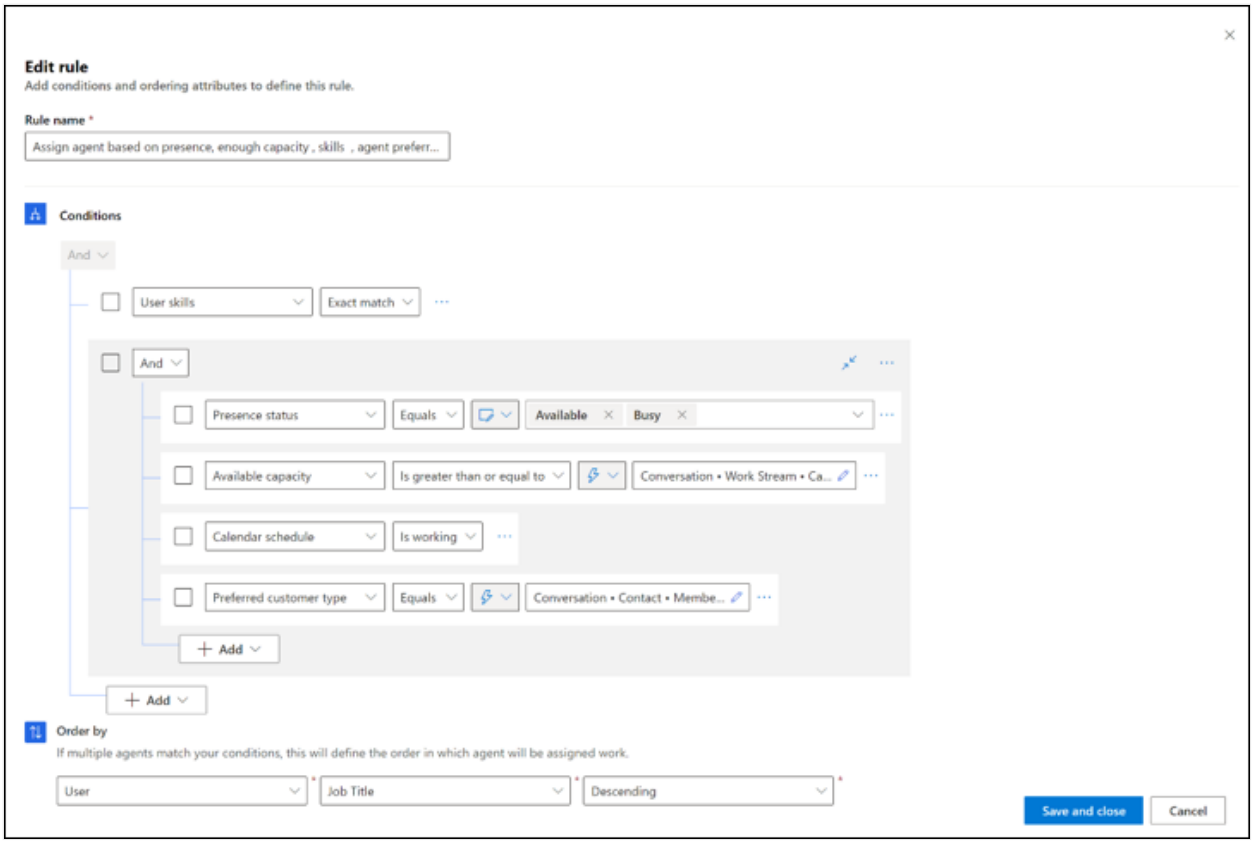
condition finds users whose country is the same as that of the customer associated with the case.

For some operators, values aren't required. They can be conditions, such as "Contains data," "Does not contain data," and "Calendar schedule: is working."

For user skills, the values are predefined for the operators. More information: Set up skill-based routing

- **Order by**: If multiple agents match the conditions in a rule, you can use the "Order by" clause to find the best-suited one. You can specify the following order by clauses:
  - **Ordering Attributes**:
    - **Most idle (preview)**: In preview release, this option is available for voice channel queues only. The work item is routed to the agent who is idle the most among all the agents who match skills and capacity. For more information, see the Types of assignment methods section.
    - Round robin
    - Unit-based available capacity
    - Profile-based available capacity
    - Proficiency
    - Skill count
  - **User Attributes**: These attributes are defined on the system user entity.

A sample assignment rule is explained in the following scenario with a screenshot.



The first condition specifies the "user skills" on which the operator is an exact match. Then the user attributes are evaluated. The different user attributes are specified with operators, and values for each attribute, such as the **Presence status** attribute, should be equal to "Available" or "Busy". On the right of the operator, you can specify the value that you want the attribute to be matched against. The values can be "static," such as "presence status equals Available or Busy". If you specify "dynamic," the condition is matched at runtime based on the expression you specify. For example, if you specify "Preferred Customer Type Equals Conversation.Contact.Membership Level," the "preferred customer type" of every agent is matched against the dynamically calculated membership level of the customer associated with the chat.

Dynamic match reduces the effort of having to write and maintain multiple static rules for each permutation and combination of the possible value.

Limits on offering a work item repeatedly to an agent

When agents are offered a work item through automatic assignment, they typically can accept or decline. Both rejection and time out of the notification is considered as a decline. An agent who declines the same work item thrice won't be considered for further auto assignment for the specific work item. The system tries to offer the declined work item to other agents in the queue if they're eligible.

For example, agent Serena Davis rejects a chat from customer Ana Bowman twice and the assignment notification times out in the third attempt. The system considers it as

three declines and auto assignment won't offer the same chat to Serena Davis again. But the system offers the chat from Ana Bowman to other eligible agents. Also, Serena Davis is considered for other incoming conversations except the declined chat from Ana Bowman.

> **Note**
>
> If all matching agents decline the work item because agent availability is low or the work requires a very specific skill and proficiency, the work remains in the queue. Similarly, if 100 agents decline a particular work item, auto assignment won't consider the work item in further assignment cycles. It can be manually assigned by supervisors or can be picked up by agents including those who rejected it.

You can update the default limit of three declines to a value between one and five based on your org requirement. The limit is applicable to all channels in the org.

You can make an OData call as follows to check the limit for your organization.

```
<org-url>/api/data/v9.0/msdyn_omnichannelconfigurations?$select=msdyn_number_of_declines_allowed
```

If this OData call returns the null value, it means that the decline limit is set to a default value of 3.

You can update the OData call as follows to modify the limit.

```
var data = { "msdyn_number_of_declines_allowed": 3 } // update the record
Xrm.WebApi.updateRecord("msdyn_omnichannelconfiguration", "d4d91600-6f21-467b-81fe-6757a2791fa1", data).then( function success(result) { console.log("Omnichannel Configuration updated"); // perform operations on record update }, function (error) { console.log(error.message); // handle error conditions } );
```

See also

Configure assignment methods and rules
FAQ about unified routing in Customer Service, Omnichannel for Customer Service
Diagnostics for unified routing
Create workstreams
Create queues
Set up unified routing for records
Set up skill-based routing for unified routing

Configure assignment methods and rules for queues

Article • 04/10/2023

After creating queues, if you want to use custom assignment methods, you'll create assignment rulesets comprising rules.

You can create the custom assignment methods in the Omnichannel admin center and Customer Service Hub apps.

In unified routing, the process of creating assignment rulesets involves the following steps:

1. **Create assignment rulesets**: For each assignment ruleset, you'll configure the conditions and order by option.
2. **Create selection criteria**: If you create more than one assignment ruleset, you'll need to define the rules for the selection criteria. The selection criteria determines the ruleset that should be run out of the many that exist. More information: Configure selection criteria.

Create an assignment method and configure rules

Follow the steps to create a custom assignment method:

1. In Dynamics 365, go to one of the admin apps, and do the following steps.

   Customer Service admin center

   a. In the site map, select **Queues** in **Customer support**.

   b. On the **Queues** page, select **Manage** for **Advanced queues**.

2. Select a queue, and on the **Assignment method** page, select **Create New**.
3. In the **Create work assignment** dialog, enter a name and description for the ruleset, and select **Create**.

4. Select the ruleset, and select **Edit**. The options to configure prioritization rulesets and assignment rulesets are displayed.

5. Do the following to set up prioritization rulesets:

   a. On the **Create Prioritization Ruleset** dialog, enter a name and description for the ruleset, and select **Create**.

   b. On the **Decision list** page, select **Create rule**, and on the **Create prioritization rule** dialog, enter a rule name and define the conditions when the rule should be run. By default, the root record for which you're creating the rule is selected and displayed at the top of the condition builder.

   c. To route the work item to agents, select the attribute on which you want to define the order by.

   d. Create as many rules as needed.

   > **Note**
   >
   > For routing records, we recommend that you manage the custom prioritization rules through the UI only and not create or update them through scripts.

6. To create an assignment ruleset, on the **Assignment method** page, select **Create ruleset**.

7. Enter a name and description for the ruleset, and select **Create**. The ruleset is created.

8. On the **Assignment ruleset** page that appears, select **Create rule**.

9. In the **Create assignment rule** dialog, do the following to add conditions and order by attributes:

   a. **Rule Name**: Enter a rule name.

   By default, the root record is selected and displayed at the top of the condition builder.

   b. **Conditions**: Select **Add** to select an attribute or related entity and define condition. You can define conditions for up to two levels of the related records and attributes.

c. **Order by**: Select an attribute to define the order of work assignment if multiple agents match the condition.

- **Ordering Attributes**:
  - **Most idle (Preview)**: in preview release, this option is available for voice channel queues only. Work item is routed to the agent who is idle the most among all the agents who match skills and capacity. For more information, see Types of assignment methods.
  - Round Robin
  - Unit-based available capacity
  - Profile-based available capacity
  - Proficiency
  - Skill count
- **User Attributes**: These attributes are defined on the system user entity.

d. Select **Create**.

e. Repeat the steps a through d to configure multiple rules.

> ⓘ **Note**
>
> We recommend that you reduce the granularity of the conditions for the assignment rules in a descending order.

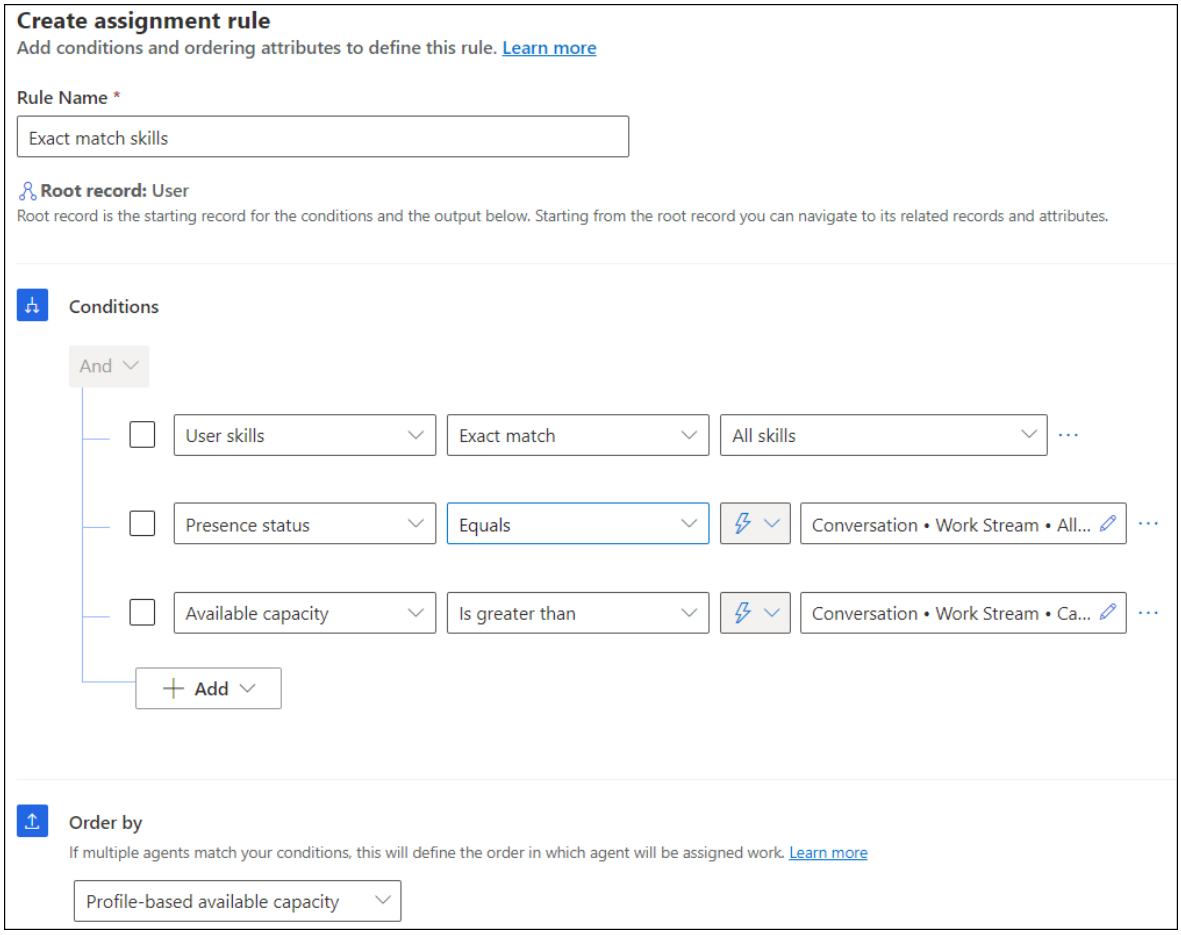
10. You can sort the order in which the rules should be evaluated during work assignment. For other tasks that you can do, such as copy, edit, and delete, see Options available for rulesets.

11. If you create more than one assignment ruleset, a warning message is displayed that alerts you to define the selection criteria to run the rulesets.

    Create a sample assignment rule with the following conditions.

Attribute	Operator	Match type	Attribute value
User skills	Exact match		All skills
Presence status	Equals	Dynamic match	Conversation.Workstream.Allowed Presences
Available capacity	Is greater than	Dynamic match	Conversation.Workstream.Capacity

> **Note**
>
> If you want to define a condition on unit-based capacity of users, then use the Available capacity attribute only as suggested in the example. Use the "is greater than" operator to ensure that available capacity is more than the required capacity.



Configure selection criteria

The selection criterion lets you define a set of conditions to determine the ruleset to be run when the condition is met. You should define the selection criteria when you configure more than one ruleset in the custom assignment method. After the ruleset is picked up by the work assignment engine, if no rule matches in the selection criteria or if no selection criterion is met, the system runs the default ruleset.

Follow these steps to configure the selection criteria for the assignment rulesets:

1. For the assignment method, in the **Assignment** section, select **Create rule**, and in the **Decision list** area, select **Create rule**.

2. In the **Create selection criteria rule** dialog, enter a rule name, and define the conditions.

3. In **Execute ruleset**, select the assignment ruleset that must be run when the conditions are met, and then select **Create**. The rule is listed in the **Decision list** area.

4. Define as many rules as the number of assignment rulesets.

See also

Create workstreams
Create queues
Set up records for unified routing
Set up skill-based routing for unified routing
FAQ about unified routing in Customer Service, Omnichannel for Customer Service

Configure routing to preferred agents

Article • 03/13/2023

For a more personalized experience, Dynamics 365 Customer Service gives you the option to route work items from a specific contact to the customer's preferred agents or relationship managers.

You can configure contacts and their preferred agents in the Customer Service admin center. If a contact isn't configured, then you can't assign a preferred agent to the contact. You can map agents to contacts only.

Prerequisites

- You must have one of the following roles to configure preferred agent routing:
  - **For Customer Service**: CSR Manager
  - **For Omnichannel for Customer Service**: Omnichannel Administrator
- You must be able to access the Contact entity. More information: Contact
- If you have a custom role, you must also have access to the msdyn_preferredagent and msdyn_preferredagentcustomeridentity entities.
- Ensure that the agent you want to assign to a contact is a member of the queue to which work items will be routed.

Configure preferred agent for contacts

1. In the Customer Service admin center site map, select **Routing**.
2. On the page that appears, select **Manage** next to **Preferred agent routing**.
3. Turn on **Enable preferred agent routing**.
4. Select who should get the work item if preferred agent is unavailable:
   - **Next best agent based on assignment logic**: The work item will be routed based on the assignment rules. We recommend that you use this option for live chat conversations and voice channel calls.
   - **No one. Let the work remain unassigned in the queue**: The work item will remain in the queue until an agent picks it up or it's manually assigned to

another agent. We recommend that you use this option for asynchronous channel conversations.

5. Select contacts and their preferred agents in the **Preferred agents matrix** area by doing the following steps:

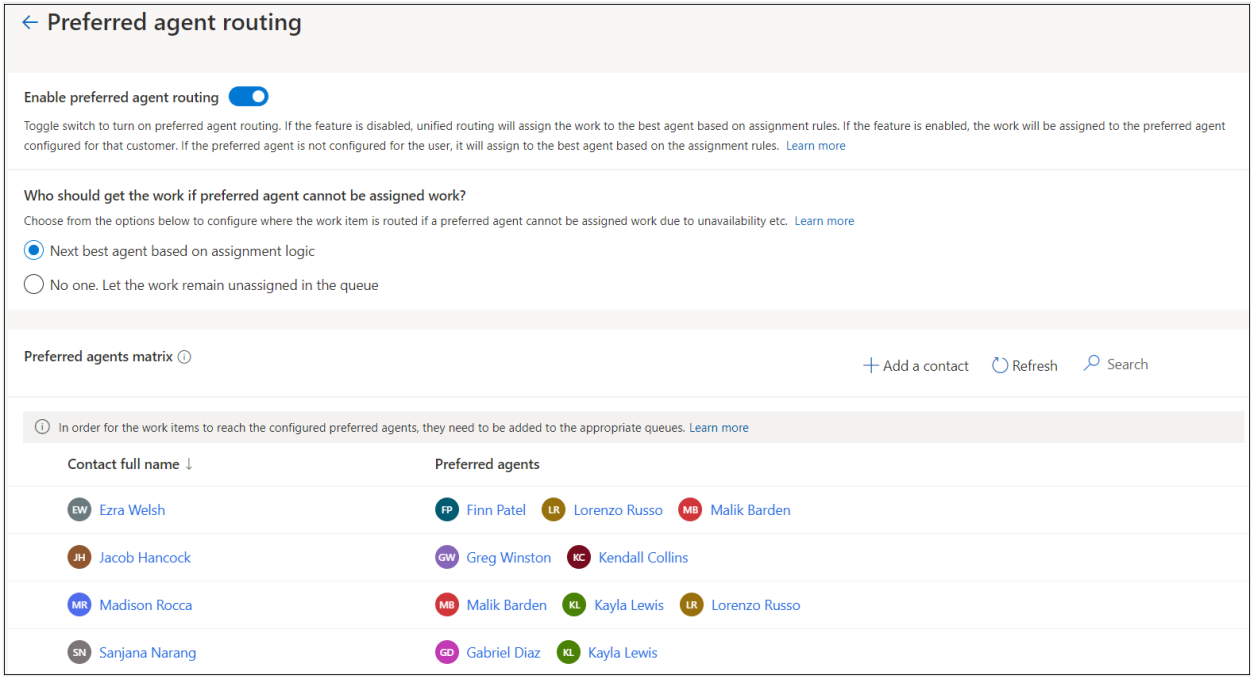
   a. Select **Add a contact** to add a contact.

   b. In **Contact full name**, enter a contact name, and select a value from the dropdown list.

   c. Select **Add user** to map agents to the contact.

   You can map up to three preferred agents to a contact. The order in which the agents are listed is the order in which they'll receive a work item if an agent earlier in the list isn't available. You can sort the agent order by selecting an agent in the list and using the **Move up** or **Move down** option.

6. Save and close.



How routing to preferred agent works

If a preferred agent exists for a contact, the system will try to directly assign the conversation to an available preferred agent whose presence matches with one of the allowed presence configured in the workstream. The check for capacity, skills, and assignment rules will be skipped. If no preferred agents are available for a contact and **Next best agent based on assignment logic** is selected as the fallback option, then the

system will try to find a matching agent according to the configured assignment strategy.

Check diagnostics for routing to preferred agents

If you've turned on routing diagnostics, the work item's diagnostics page will include information about preferred agent routing under **Agent assignment trace**. The **Assignment criteria** section shows whether the setting is turned on. The **Assignment trace** section displays the reason information. More information: Diagnostics for unified routing

Update contacts and preferred agents

In the **Preferred agents matrix** section, use the edit and remove options to modify contacts and their preferred agents.

For each contact, you can map a maximum of three agents, but ensure that at least one agent is mapped to the contact.

Identify contacts in supported channels

To find the preferred agent for an incoming work item, the contact should be identified. For supported channels, use the information mentioned in the following table to identify customers as contacts.

Channel	Customer record
Record	• **Case**: Use the **Customer** field to store the contact ID. • **Email, phone, fax, letter, appointment**: Use the **Regarding** field to store the contact ID.
Digital messaging: Chat, voice, and other channels	• **Chat**: Authenticated users are automatically identified as contacts. For unauthenticated users, use the pre-conversation survey to set the survey question name as **Name**. • **Voice**: Authenticated with the phone number. • Other channels: Social profiles.

Add multiple preferred agent records

You can add multiple preferred agents to contact records at a time using the createRecord call to update the preferred agent entities, msdyn_preferredagent and

msdyn_preferredagentcustomeridentity.

If you want to add multiple preferred agent routing records through the script, ensure that you map only three unique agents to a contact. If you add more than three agents, though the application displays all the mapped agents, work items are routed only to the top three agents. Agents are ordered based on the preference rating. If agents have the same preference rating, the application orders the agents based on the record creation timestamp.

You can also update or delete records using the updateRecord or deleteRecord calls.

> **Important**
>
> We recommend that you add the contact and preferred agent routing through the Preferred agent routing page.

See also

Overview of unified routing
Configure queues
Blog: Use preferred agent routing to create lifelong customer relationships

Manage overflow of work items in queues

Article • 08/10/2023

When a new work item gets routed with unified routing, the system tries to find the best-suited agent to work on the work item. Sometimes all eligible agents are at maximum capacity. In scenarios like these, you can configure overflow conditions to handle the surge and unassigned work items to ensure customer satisfaction. You can also send notifications to the customer about their waiting state or when their query will be resolved.

For work items, such as calls, conversations, and cases, you can address the following scenarios:

- When an incoming work item exceeds a defined number of conversations or calls that can wait in the queue.
- Calls and conversations are received during non-business hours of the call center.
- The wait time is high for customers and you want to reduce it.

If you don't configure overflow, by default, the work item will stay in the queue until it gets routed based on the routing rules configured for the workstream.

How queue overflow is evaluated

The overflow conditions and actions are run only if the route-to-queues rule is configured. The overflow evaluation takes place before a work item is routed to a queue and after the route-to-queues rules are evaluated. Any manual actions like agent transfer or supervisor assign won't trigger overflow actions.

The following factors are considered during the overflow evaluation:

- If multiple queues match in the route-to-queues rules, the system routes the work item to the first queue that's not overflowing.

- If all matched queues are overflowing, one of the following actions takes place:
  - The system routes to the queue that's operational and the overflow action is triggered.
  - If none of the queues are operational, the system routes the work item to the queue that will be operational at the earliest and the overflow action is triggered.

- If percentage-based routing is configured, the overflow conditions are evaluated after percentage-based routing identifies the queue.
- If the matched queue is overflowing due to multiple conditions:

  The system evaluates the action that's defined for the operating hours condition first, followed by the other conditions in the order they've been defined.
- If a work item is routed to a fallback queue because of errors or no route-to-queue rule has matched the requirement, the overflow settings for the fallback queue aren't considered and work item is assigned to the queue.
- If a bot is configured for the workstream, the overflow settings are evaluated only after the bot escalates the conversation to human agents.
- If multiple bot escalations happen before the conversation is escalated to a human agent, the overflow settings are evaluated and triggered after the first bot escalation.

When you add an operating hour record to a queue, the system assigns a default overflow condition as **Out of operation hours**, and its action as **Assign to queue anyway**. You can't edit the condition but can set another action for it.

The channel-specific operating hour setting that's configured in the workstream doesn't affect the overflow settings.

The following table lists the condition and action pairs available for different channel types.

Channel	Condition	Action
Voice	• Out of operating hours • Work item limit exceeds • Average wait time	• Assign to queue anyway • Direct callback • End call • Transfer to a different queue • Transfer to an external number • Voicemail
Live chat and other messaging channels	• Out of operating hours • Work item limit exceeds	• End conversation • Transfer to a different queue • Assign to queue anyway

Channel	Condition	Action
Record	• Out of operating hours	• Assign to queue anyway • Transfer to a different queue

Prerequisites

For overflow to work correctly, the following prerequisites must be met:

- Agents should be configured for the queues.
- To transfer calls, make sure that external phone numbers with outbound calling are available.

Configure overflow conditions

In the Customer Service admin center app, do the following steps:

1. In the site map, select **Queues** in **Customer support**.
2. On the **Queues** page, select **Manage** for **Advanced queues**.
3. Select the queue for which you want to manage overflow.
4. In **Overflow handling**, select **Add condition-action pair**. The **Overflow handling** dialog displays the options to configure conditions and actions.
5. Select **Add condition-action pair**. The **Condition** and **Action** fields are displayed.
6. For the record, messaging, and voice queues, you can set the **Out of operation hours** condition and one of the following actions:

   - **Assign to queue anyway**: The work item is routed to the queue although it's in the overflow state.
   - **Transfer to a different queue**: Select a queue in the dropdown list.

   For the **Out of operation hours** condition, the following extra actions are available for the messaging and voice queues:

   - **End call**: For voice queues only. An automated voice message is presented to the caller and the call ends.
   - **End conversation**: For messaging queues only. The conversation is routed to the queue and ended.

- **Transfer to a different queue**: Select a queue from the dropdown list that appears. The work item is transferred to the selected queue.
- **Transfer to an external number**: For voice queues only. Enter the number to which the call must be transferred.
- **Voicemail**: For voice queues only. Customers can choose to leave a voicemail that the agents will receive to act upon.

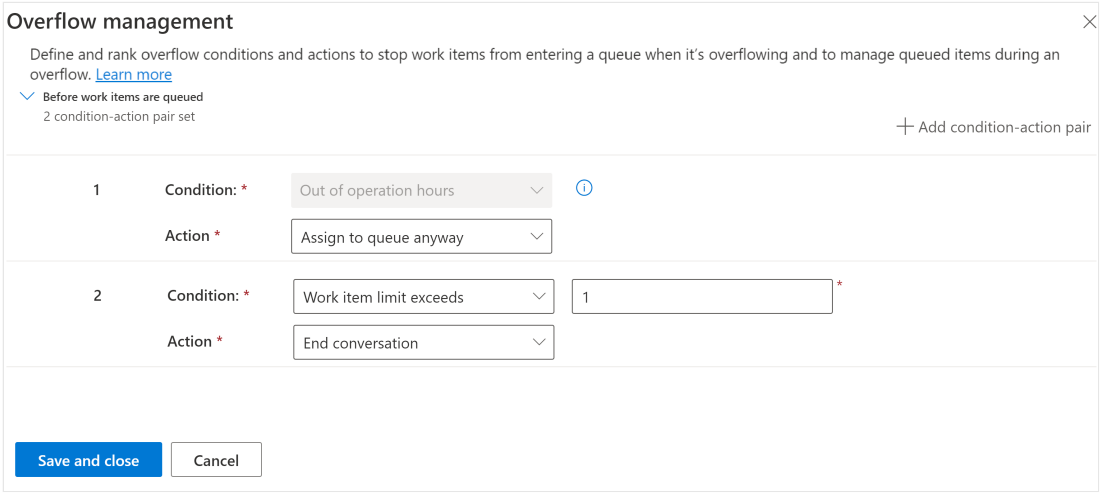
7. For the messaging and voice queues, you can set the following extra conditions and actions:

    - **Work item limit exceeds**: Enter a value between 1 and 100 to denote the maximum number of work items that can be in the open state before overflow is reached. For example, if you enter 2 as the value, then two items should be open in the queue for the third item to trigger one of the following actions:
        - **Direct callback**: For voice queues only. Customers can choose to receive callback from agents that's presented to them by the automated message. The work item stays in the open state and is routed to the next available agent to call back the customer.
        - **End call**
        - **End conversation**
        - **Transfer to a different queue**
        - **Transfer to an external number**
        - **Voicemail**

    - **Average wait time**: This condition is available for voice queues only. Enter a value between 30 seconds and 60 minutes to denote the wait time. If the predicted wait time for the queue is more than what you have configured, the system triggers one of the following overflow actions for the work item instead of adding it to the overflowing queue:
        - **Direct callback**
        - **End call**
        - **Transfer to a different queue**
        - **Transfer to an external number**
        - **Voicemail**

        > ⓘ **Note**
        >
        > The average wait time is calculated for a queue by taking the average of the wait times for the previous 48 hours and a minimum of 50 conversations in the queue.
        > For example, if a customer calls on a Thursday at 5:00 PM, the wait time

is calculated by taking the average wait time of all the calls from 5:00 PM, Tuesday that denotes the previous 48 hours, provided 50 or more calls are in queue. If the number of calls is less than 50, the "Average wait time" overflow condition isn't evaluated because it doesn't meet the criteria to calculate the wait time.

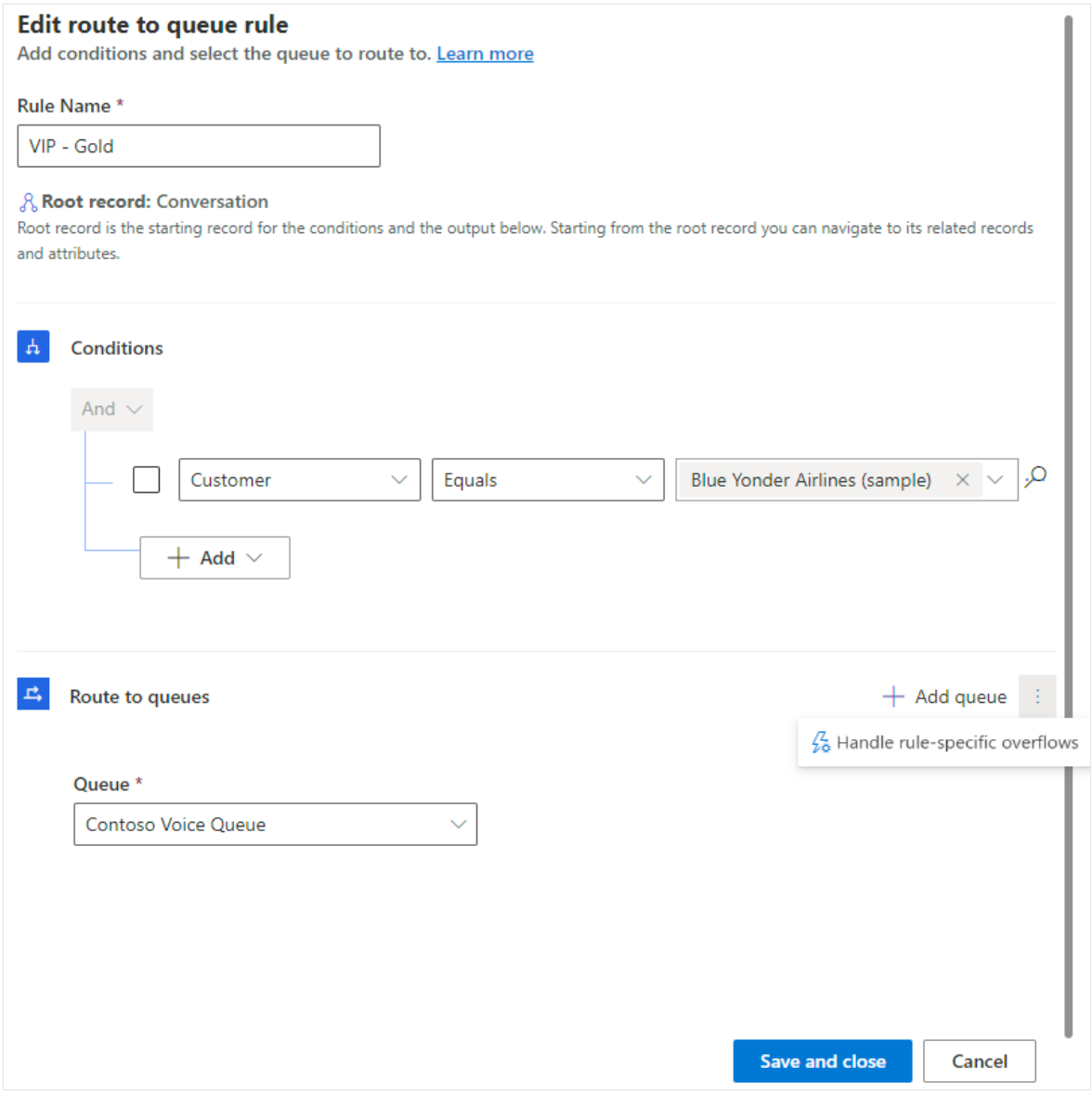


Configure rule-specific overflows

Sometimes, you might not want an overflow action to run for specific types of work items or for priority customers. For example, a priority customer raises an issue and the queue to which it's routed could be overflowing as "end call" or "keep waiting in queue". This action might not meet the service-level agreement (SLA) that you have with your customer. To handle such a scenario, you might want to configure rule-specific overflow conditions for those queues in the route-to-queue rules for a workstream.

1. In the Customer Service admin center, go to the workstream and select the route-to-queue rule in which the queue is configured.

2. In the **Route to queues** area, select the **More commands** ellipses next to **Add queue**.

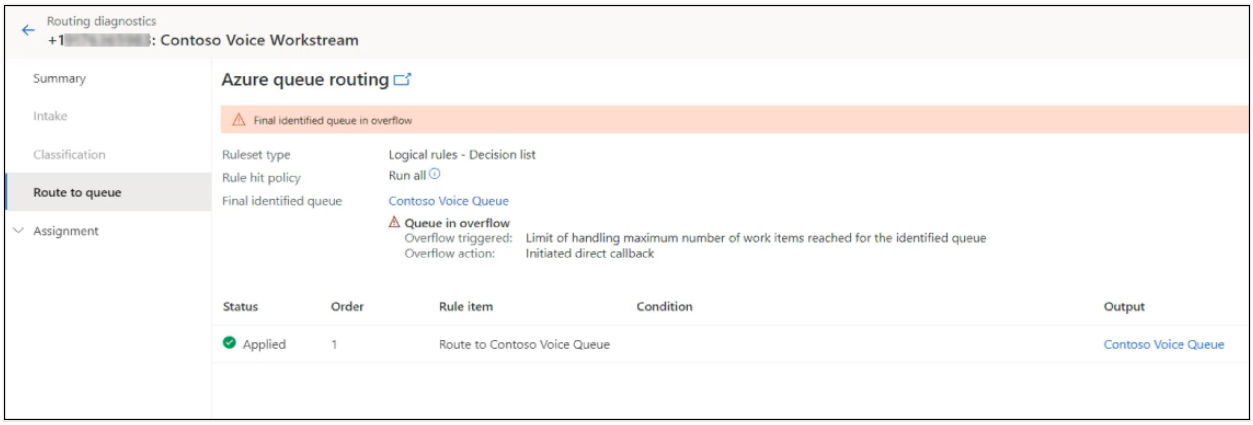


3. Select **Handle rule-specific overflows**.

4. Do the steps to add condition and action pairs and set the action for each condition that you define as listed in the **Configure overflow actions** section in this article.

View diagnostics for overflow

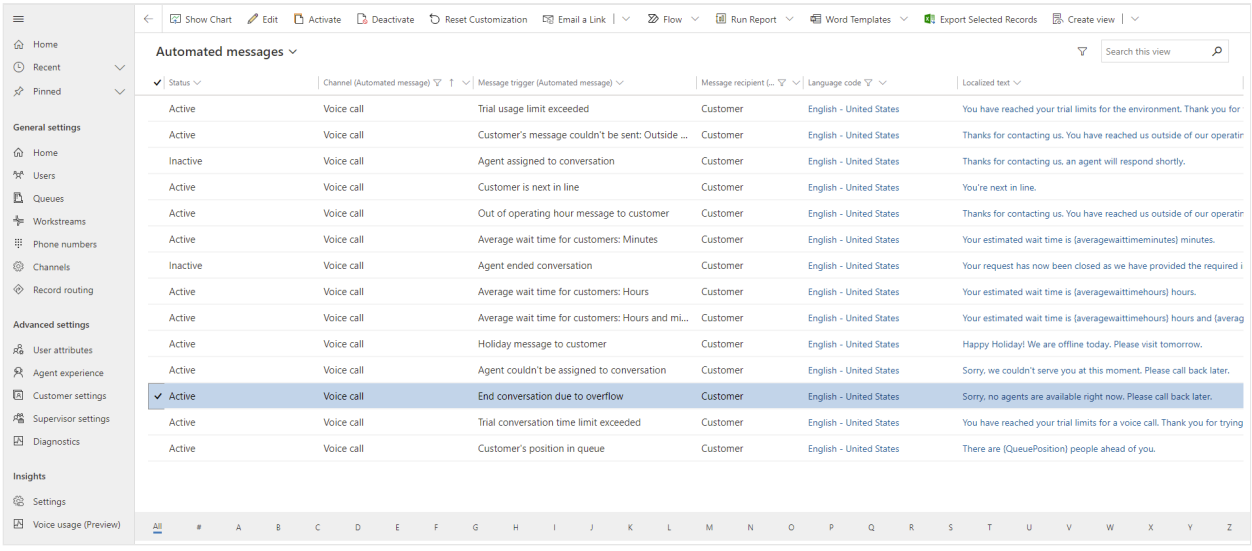
Whenever a work item is handled by the overflow action instead of being assigned to an agent, you can view its status in the **Route to queue** stage of the diagnostic page.



Edit automated messages for end call overflow action

If you have set **End call** as an overflow action for the voice queue, an automated message will be delivered to the customer to let them know that the conversation will end. You can edit the message that the customer will hear.

1. In the Customer Service admin center site map, go to **Customer settings** in **Customer support**, and select **Automated messages**.
2. Find the automated message for the **Voice** channel where the message trigger is "Voice call ended".
3. Edit the value in the **Localized text** column as needed.



More information: Customize automated messages

See also

Configure voicemail
Configure direct callback
Create and manage queues
Configure percentage-based routing

Overview of voice channel

Overview of unified routing

Configure routing for the voice channel

Provision unified routing for Customer Service

Article • 08/11/2023

Perform the steps mentioned in this topic to provision unified routing in Customer Service. By default, unified routing is not enabled.

Prerequisites

- Ensure that the provisioning user has the following permissions:
  - Microsoft 365 Global admin role. More information: Assign admin roles to user in Microsoft Office 365
  - Customer Service Representative or CSR Manager to be able to set up configuration.
  - Dynamics 365 System Administrator role on the root business unit for your organization. More information: Assign security roles to a user in Power Platform and Create or edit business units
  - Read-Write access in the Client Access License Information (CAL). More information: Create a Read-Write user account in Power Platform
- **License required for unified routing**:
  With the Customer Service Enterprise license, you'll get unified routing for tables, such as Cases, Leads, and custom tables. The license for Chat and Digital messaging includes unified routing for chat, SMS, and messaging channels, and the Teams channel. More information: Dynamics 365 Licensing Guide

Provision unified routing for only Customer Service

To provision unified routing in Customer Service, do the following:

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Routing**. The **Routing** page appears.

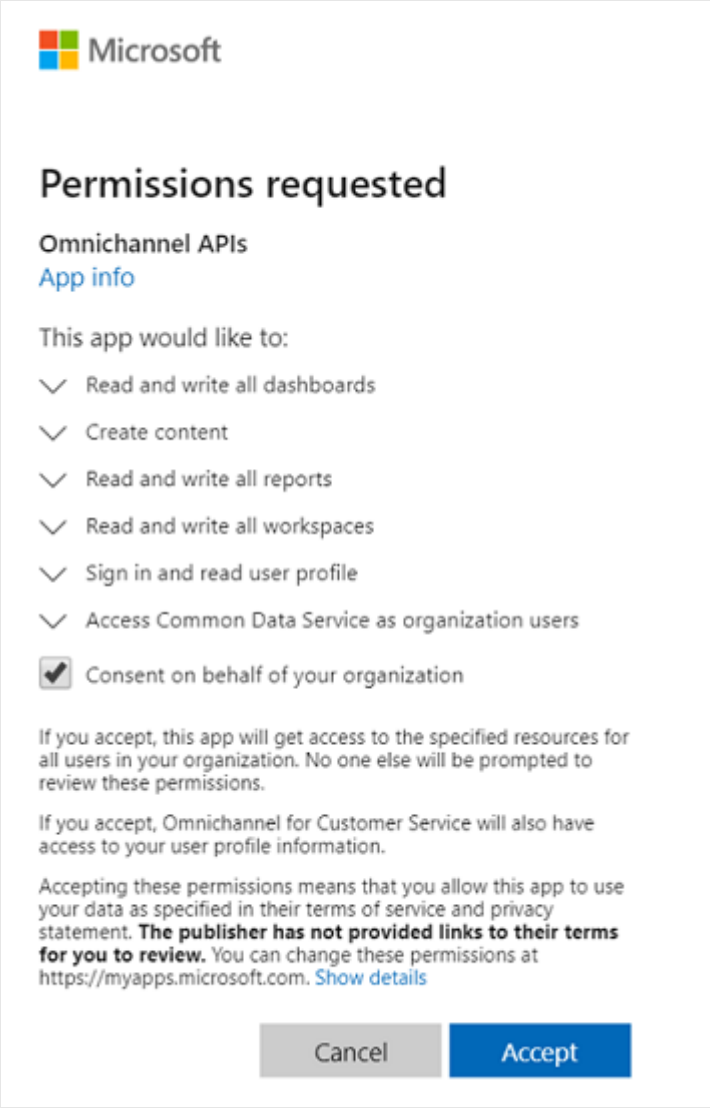
   b. Select **Manage** for **Turn on Unified Routing for Records**.

2. If consent is already provided by the tenant administrator, go to **Step 5**.

   If consent to access is not provided by the tenant administrator, in the **Unified routing** section, the following message with a link to the consent page will be displayed:

   "Unified routing requires application permissions. A tenant administrator must provide consent before it can be turned on. Provide consent."

3. Select **Provide consent**. The following consent form is displayed on a new tab.



   For information on consent, see Consent to access data to provision Omnichannel for Customer Service

4. Select **Consent on behalf of your organization**, and select **Accept**.

5. After access is granted, you can close the page to return to the **Service Configuration Settings** page.

6. Set the toggle to **Yes** for **Turn on unified routing**. A message that unified routing is being provisioned appears.

After unified routing is provisioned, **Unified routing successfully provisioned** message appears on top of the toggle key.

Provision unified routing in Customer Service with Omnichannel for Customer Service

When Omnichannel for Customer Service is available but not deployed, in the **Service Configuration Settings** page, the following message will appear:

"Some required services need to be installed before unified routing can be turned on. Please contact Microsoft Support."

When Omnichannel for Customer Service doesn't have the required solutions, the following message will appear:

"Before unified routing can be turned on, Omnichannel needs to be updated. Please contact Microsoft Support."

> ⓘ Note
>
> **Unified Routing** also appears in the site map if you install or upgrade Omnichannel for Customer Service.

Next steps

- Set up the user as a bookable resource
- Process for setting up unified routing

See also

- Provide consent to access data
- Set up record routing
- Provision Omnichannel for Customer Service

Set up unified routing for records

Article • 09/20/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can configure routing for records in Customer Service admin center, Customer Service Hub, or Omnichannel admin center. However, unified routing can be configured only in Customer Service Hub or Omnichannel admin center.

If you only have Dynamics 365 Customer Service, then the options to configure unified routing will be available only after you enable unified routing in the service configuration settings.

Important

- After you enable the unified routing feature in **Service Configuration Settings**, you can't disable it. You'll need to contact Microsoft Support to disable the feature.
- Provisioning unified routing might impact runtime operations on account of solution import that can impact SQL load.
- If you're upgrading your environment and Omnichannel for Customer Service is also installed, you might have existing workstreams for record routing. We recommend that you provision unified routing only after recreating those workstreams for record routing in your admin app.
- If you're an existing customer, we recommend that you configure and test unified routing in a test or development environment before configuring it in your production environment.
- If you're routing, updating, or deleting multiple records at a time, and facing any technical or performance-related issues with unified routing, we recommend that you contact Microsoft Support to troubleshoot the issues.

Prerequisites

- To set up record routing for Customer Service, unified routing must be enabled in your environment. More information: Provision unified routing for Customer Service
- To route records, you must enable the record for routing using records channel configuration. More information: Records routing
- You must have the System Administrator role to configure record routing.
- You must have users configured as bookable resource. More information: Set up the user as a bookable resource

Configure unified routing for records

1. In Dynamics 365, go to one of the apps, and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Routing** in **Customer support**. The **Routing** page appears.

   b. Select **Manage** for **Record routing**.

2. On the **Record routing** page, select **Add**.

3. In the **Add a record type** dialog, select a record from the **Record type** list, and select **Add**. The record is added and listed on the **Record routing** page.

4. Configure the following:
   a. Workstreams
   b. Intake rules

Create workstreams for record routing

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Workstreams** in **Customer support**.

   b. Select **New workstream**.

2. In the **Create a workstream** dialog, enter the following details:

- **Name**: Enter an intuitive name, such as **Contoso case workstream**.
- **Work distribution mode**: Select **Push** or **Pick**.
- **Type**: Select **Record**.
- **Record type**: Select a record from the list.

3. Select **Create**. The workstream is created.

Configure intake rules

Intake rules for a record help determine the workstream to be picked up to assign an incoming work item.

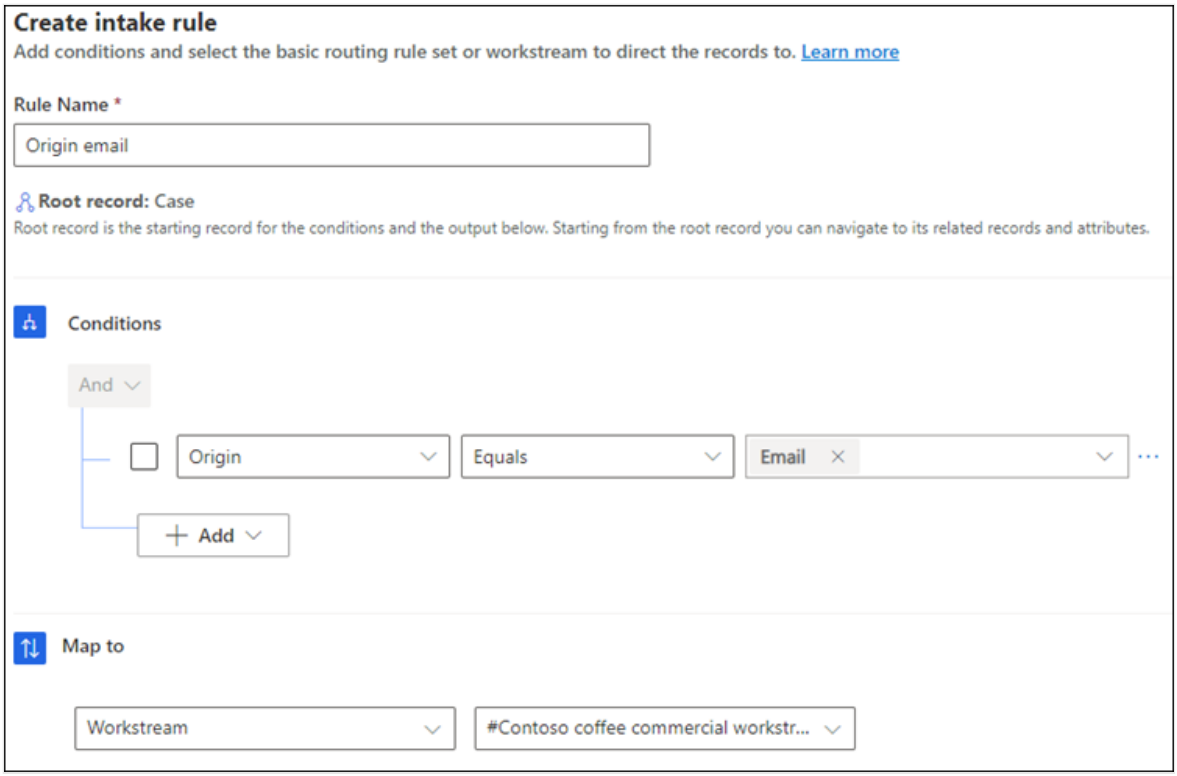
You can create intake rules independently and map them to basic routing rulesets also. However, on any workstream details page, only those intake rules will be displayed that are mapped to the workstream. Therefore, if you want to prioritize the runtime evaluation of the intake rules, you'll need to select **See more** on the workstream details page, and reorder the rules in the **Decision list**.

Perform the following steps:

1. Select the workstream that you configured for routing records, such as the case.

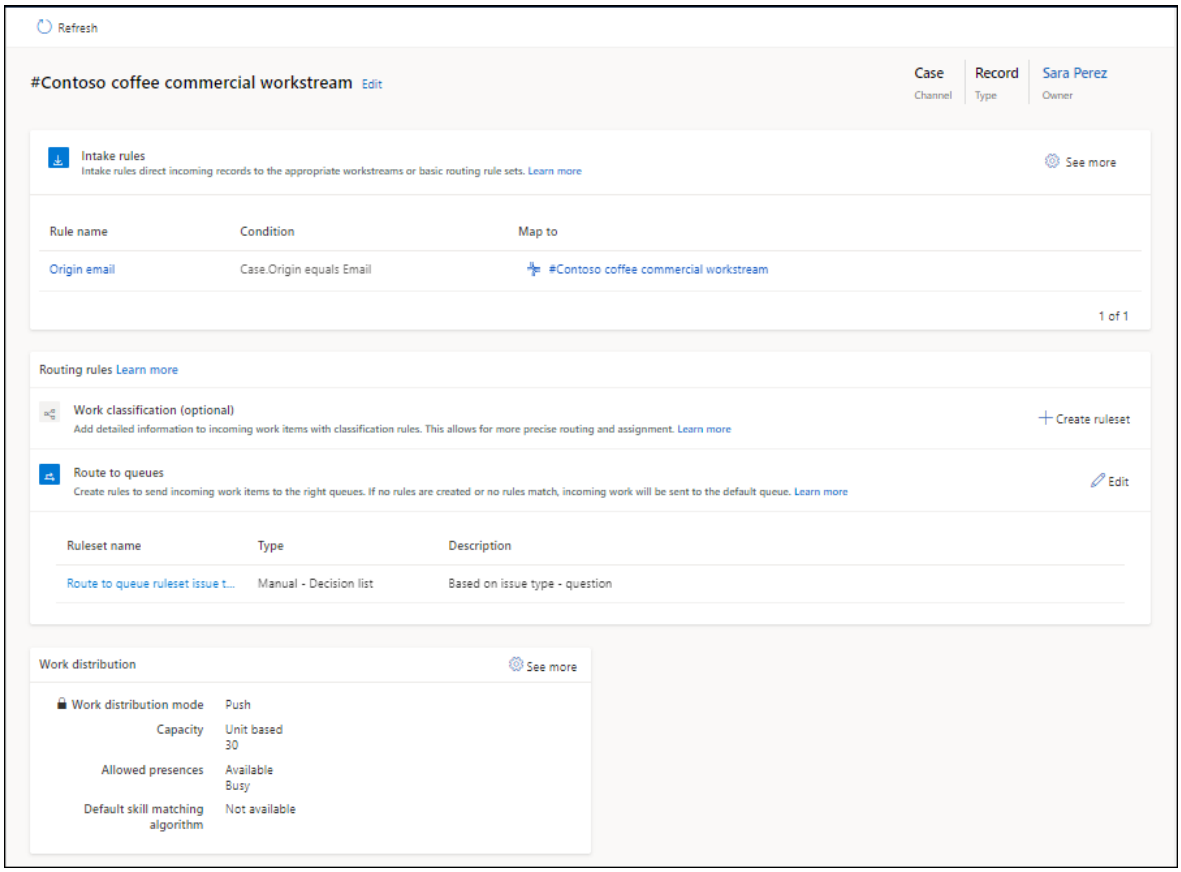
2. In the **Intake rules** area, select **Create rule**.

3. In the **Create intake rule** dialog, enter a name and define the conditions for the rule. By default, the root record is selected and displayed at the top of the condition builder for ease of reference and visibility of the record for which you are creating the rule. You can define conditions for up to two levels of the related records and attributes.

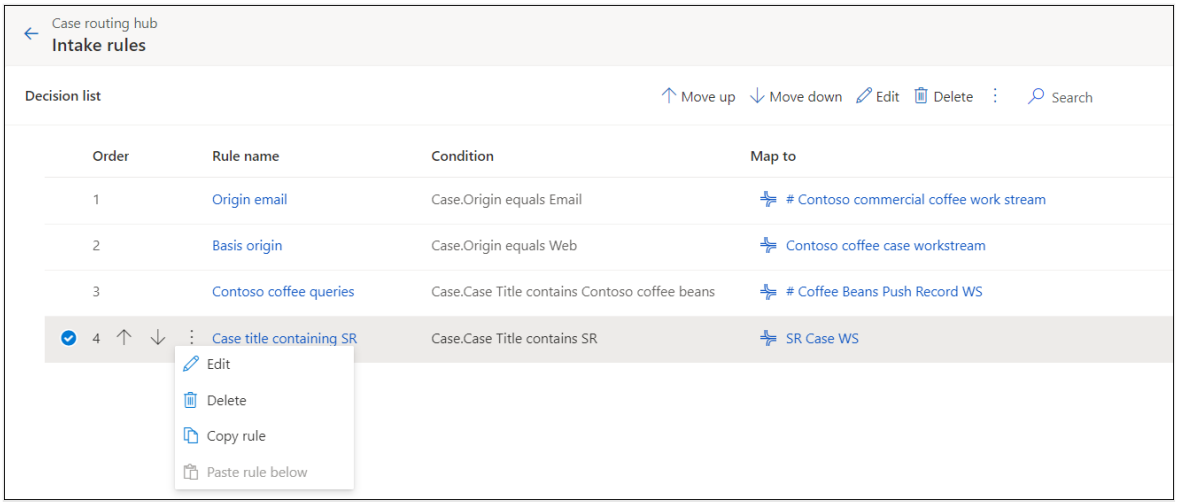


4. Select **Create**.

   The following screenshot shows a workstream with the required intake rule and route to queues.



You can reorder the rules and create copies to meet your business requirements.



Configure routing rules

Routing rules for a workstream consists of work classification rules and route-to-queue rules. For the steps to configure routing rules, see the following:

- Configure work classification rules
- Configure route to queues

Configure work distribution and advanced settings

1. In the **Work distribution** area, you can either accept the default settings or select **See more**, and update the following options:

    - **Capacity**: Select one of the following options:
        - **Unit based**: Enter value if your organization has configured unit-based capacity.
        - **Profile based**: Specify a profile in the list if your organization has configured profile-based capacity. More information: Create and manage capacity profiles

    - **Allowed presences**: Select the presences in which agents will be assigned. If you want to route records in Customer Service Hub, make sure that you add all the required presences to be able to route work items as required.

    - **Default skill matching algorithm**: Select **Exact Match** or **Closest Match**.

2. Expand **Advanced settings** to configure the following options:

    - Sessions
    - Agent notifications

> **Note**
>
> - The agent notifications that you configure for routing of records based on unified routing will be displayed in the Customer Service workspace and Omnichannel for Customer Service apps only.
> - Ensure that the agents in the queues have correct permissions to handle the incoming work items in the queue. If an agent doesn't have permissions to an assigned work item, the assignment will be stopped, and the conversation will be closed to protect it.

Next steps

Enable routing diagnostics
Process for setting up unified routing

See also

Overview of unified routing
Create and manage workstreams
Create multiple workstreams for records routing
Configure routing for email records
Release agent capacity
Assign roles and enable users
FAQ about time taken by configuration changes in unified routing

Enable tables for queues in unified routing

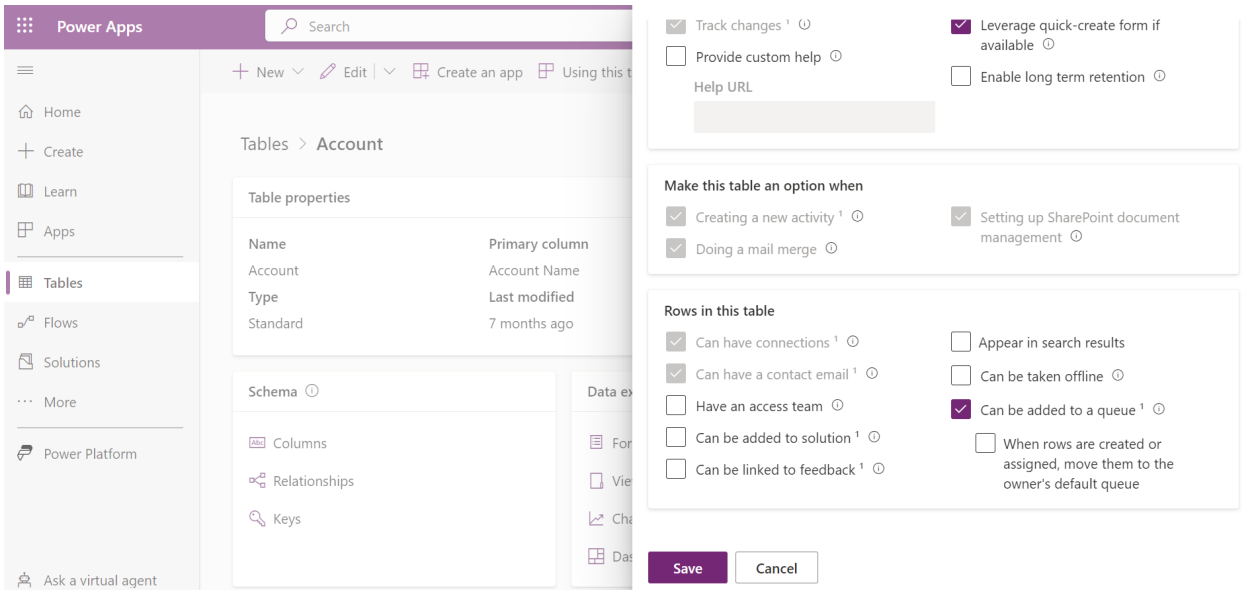
Article • 07/25/2023

Any record that you want to enable for routing needs to be enabled for queues.

Enable a table for queues

1. In Power Apps, select the environment that contains your solution.
2. Select **Tables** and then select the required table such as **Account** or **Email** for which you want to enable queues.
3. In **Table properties**, select **Properties**.
4. Select **Advanced options**, and then select **Can be added to a queue** in the **Rows in this table** section .
5. Select **Save**.

> **Note**
>
> - You can't disable the table, if you enable it for a queue. The app disables the **Can be added to a queue** checkbox after you select it.
> - If you enable the option **When the rows are created or assigned, move them to the owner's default queue**, in the table customization, then the record won't be automatically distributed to the agents. You must clear the checkbox to automatically distribute the records.



See also

Set up record routing

Set up unified routing for email records

Route records automatically using custom flow

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Set up custom flow to automatically route records

As an administrator, you can route records automatically using Power Automate. Set up a custom flow to automatically route records based on certain conditions, such as when a record is created or updated. Let's see how to set up a custom flow for the create condition.

> **Note**
>
> By default, for all of the cases created from the user interface, the **Route Case** field is set to **No**. So, routing for these cases is not triggered.
> For case records, an out-of-the-box trigger is shipped to route the cases automatically. The routing is based on the **Route Case** field value in the case record. When a case record is created, it is either routed or not routed based on the **Route Case** field value of **Yes** or **No**.

To enable automatic routing of records:

1. Sign in to Power Automate and select the environment for which you want to create the flow.
2. Select **My flows** on the site map, then select **New flow**. Under the **Build your own from blank** option, select **Automated cloud flow**. The **Build an automated cloud flow** dialog box appears.
3. Select **Skip**. A list of all connectors and triggers is displayed.

4. Select **Microsoft Dataverse**. In the corresponding list of triggers that appears, select **When a row is added, modified or deleted**.
5. Specify the following values for the **Change type**, **Table name**, and **Scope** fields.
    - **Change type**: Create
    - **Table name**: Email Messages
    - **Scope**: Organization
6. Select **New step**. The **Choose an operation** dialog box appears.
7. Select **Perform an unbound action** from the **Actions** list. The **Perform an unbound action** dialog box appears.
8. Enter **msdyn_ApplyRoutingRuleEntityRecord** in the **Action Name** field as a custom value.
9. In the **Target** field, enter the entity collection name and unique identifier of the record as follows:

    `<entity collection name>(unique identifier of the entity)`, such as **emails(Email Message)**

    To get the entity collection name for a particular entity:
    a. Open your browser and go to `https://<org_name>/api/data/v9.0/EntityDefinitions(LogicalName='<entityname>')`. For example: `https://contoso.dynamics.com/api/data/v9.0/EntityDefinitions(LogicalName='email')`.
    b. Search for `LogicalCollectionName` to view the entity collection name for a particular entity.
    For example: `"LogicalCollectionName":"emails"`.
    Here, `emails` is the entity collection name.
10. Select **Save**.

Now, based on the flow that is defined, whenever a record (in this example, an email) is created, the flow applies the **msdyn_ApplyRoutingRuleEntityRecord** action to the record. Similarly, you can create a custom flow based on your business scenarios.

You can also perform other actions in the flow, such as filtering out certain records that you don't want to route and performing data transformation.

See also

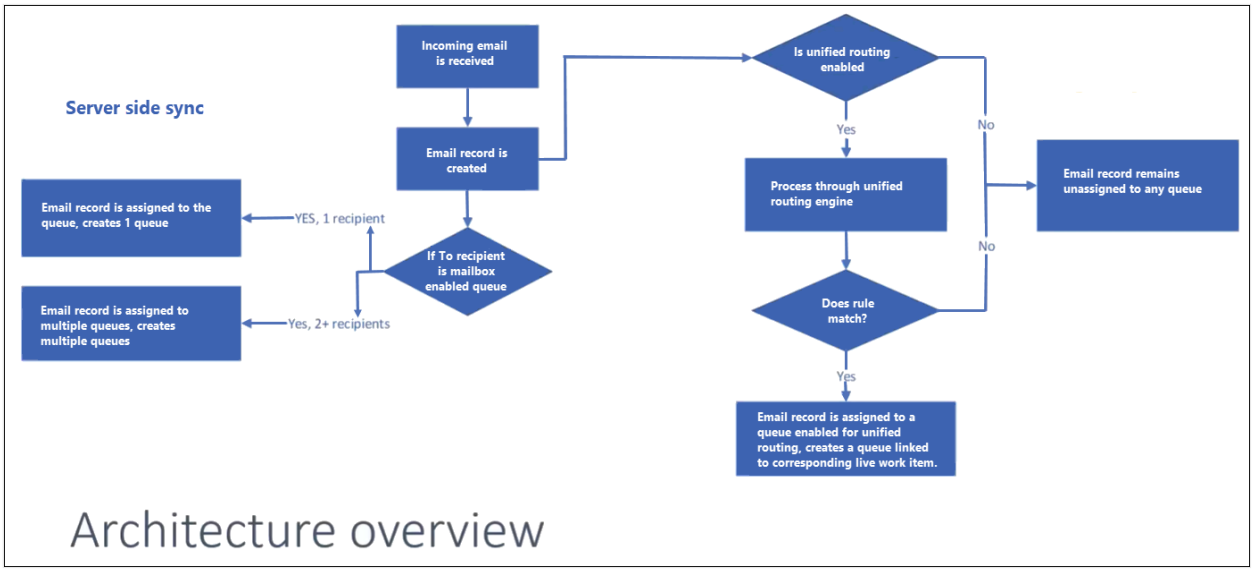
Overview of routing
Set up routing for records
Manually route records
Sample code to trigger routing for non-case records

Set up unified routing for email records

Article • 08/29/2022

With unified routing, you can route any activity in Dynamics 365 Customer Service. Emails are one such example of the activity type that you can turn into work items and add them to queues for agents to work on.

A high-level overview of unified routing with email records is as follows.



Route email as a case

1. Set up rules to create or update records automatically.
2. Save and route the case on the case form.

Route email as a record

1. Set up a dedicated mailbox and share the email ID with customers. When a customer emails the ID, the email is converted to a case and routed to the queue that's associated with the mailbox.
2. Set up server-side sync to create the email record and queue item.
3. Create a flow to automatically route the work item to agents.
4. Create workstreams and set up classification and route-to-queue rules.
5. Set up intake rules to identify the workstream to route the email record.
6. Create queues and set up assignment methods.

> **Note**
>
> You must ensure that the agent capacity is released after the agent completes their work on the email record. More information: **Release agent capacity**

See also

Overview of unified routing
Enable unified routing
Configure classification rules
Create queue items from synchronized email messages
Use email message filtering and correlation to specify which emails are tracked

Overview of skill-based routing

Article • 03/08/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Note**
>
> The data such as but not limited to skills, rating model, and rating value that is created, updated, and used in Omnichannel for Customer Service is shared with other model-driven apps (Field Service and Project Service Automation) installed in your environment. Similarly, the data that are created, updated, and used in other model-driven apps are available for use in Omnichannel for Customer Service.

In the customer service center, your agents have different skill sets and abilities. The customers who reach out to the contact center might have different needs. Skill-based routing lets your customer service center distribute work items (conversations) to the agent who is most qualified to solve the issue. Skill-based routing improves the quality of customer service by automatically distributing work items to the agent who has the skills necessary to do the work.

You can also associate skills with bots and route work items using skill-based routing.

For example, for an incoming conversation related to **Xbox** from Spain, the skill required is knowledge of the **Xbox** product and **Spanish** language. Now, with skill-based routing, the system identifies the agents with those specific skills and distributes the conversation to one of them.

Skill-based routing allows you to easily match the conversation with the agent that's most proficient in dealing with it while maintaining the workload of the agent. You can associate distinct skills with each agent on your team and create rules to make sure that conversations matching those skills are always assigned to them.

You can also enable your agents to update skills for the work items assigned to them. Agents can assess, add, remove, and update skills required for a particular work item, based on their abilities and experience. Now, if your organization uses machine learning model for skill prediction, you can use the updated skill information to retrain your skill

finder model, so that the system is later able to efficiently and effectively route the work items (conversations) to the agent best suited for the work. More information: Retrain skill finder model

Value proposition of skill-based routing

- Assign conversations to agents who are best qualified to address the issue.
- Minimize overheads in queue maintenance.
- Use agent skills effectively.
- Enhance productivity.
- Effectively manage skills based on the CSAT and KPIs.
- Resolve conversations faster.

Prerequisites

If your environment has scheduling solutions, then you must have version 9.0.0.0 or later.

Videos

Skill-based routing in Omnichannel for Customer Service

To view more videos on Omnichannel for Customer Service, see Videos.

See also

Set up skills and assign agents
Attach skills to conversation
Set up skill-based routing
Model data tables as skills

Set up skills, create a rating model, and assign agents

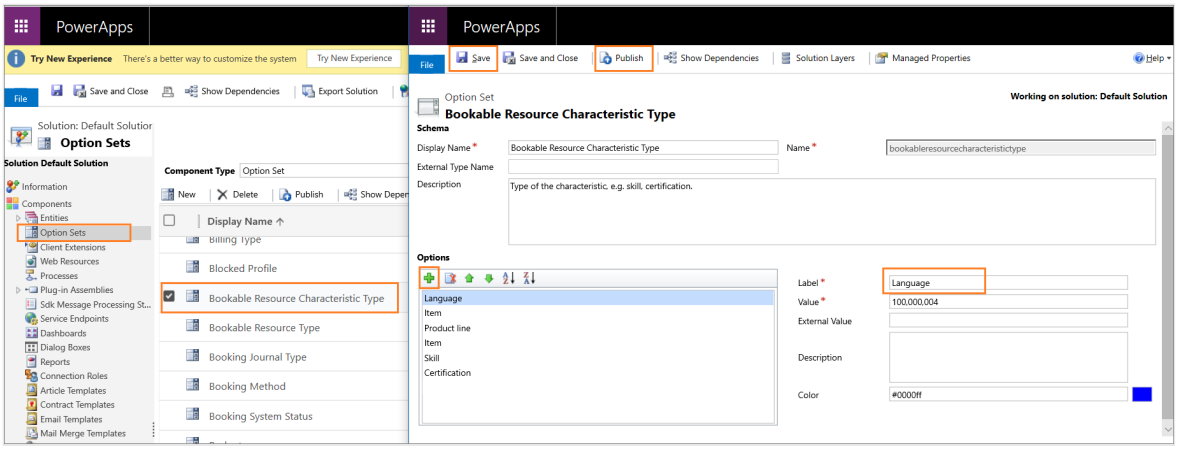
Article • 06/07/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As an administrator, to create skills, you need at least one skill type in the system. For example, to add **Spanish** as a skill, you need a skill type called **Language**. You must first create a skill type and then create skills.

Create skill types

1. Sign in to the Dynamics 365 instance.
2. Select **Settings** > **Customizations** > **Customize the System**.
3. Select **Option Sets** from the left pane.
4. Double-click the **Bookable Resource Characteristic Type** from the list. A new window opens.
5. Select the **Add** icon under the Options container.
6. Type a name for the Label field. For example, **Language**.
7. Select **Save** to save the skill type.
8. Create as many skill types as required.
9. Select **Publish** to publish the customization changes.



Manage skill settings in skills hub

Skills hub in Customer Service admin center helps you seamlessly create and assign skills to your agents. Use the **Skills hub** page to create and edit, add and remove users to skills and manage their proficiency.

1. In Dynamics 365, go to Customer Service admin center.
2. In the site map, select **User management** under **Customer Support**.
3. Select **Manage** for **Skills hub**. The Skills hub page displays the skills, skill types, proficiency scales, and intelligent skill find models.

Manage proficiency scales

Create or update proficiency scales that are used to rate agent proficiency in the assigned skills.

1. On the **Skills hub** page, select **Manage** in **Proficiency scale** area.
2. To create a proficiency scale, on the **Proficiency scale** dialog, select **Create**, and do the following:

   - **Scale name**: Enter a scale name.
   - **Minimum rating value**: Enter the minimum value.
   - **Maximum rating value**: Enter the maximum value.

> ⓘ **Note**
>
> You can enter positive values only as minimum and maximum rating values.

- **Level names**: Enter names for each rating value, such as average, good, and excellent.

3. Select Create.

If you'd created proficiency scales in the classic experience, you can update them in the classic experience only.

Create skills in skills hub

1. On the **Skills hub** page, select **Manage** in the **Skills** area.
2. On the **Skills** page, select **Create**.
3. On the **Create Skill** dialog, select a skill type in the **Skill type** list, and then enter a name for it in **Skill name**.
4. To add the skill to users, in the **Users** section, select **Add**, and then select the users.
5. Select **Add selected users**.
6. To add proficiency, select the users who will be assigned the same proficiency, select **Update proficiency**, and select a value from the dropdown list. The proficiency value is assigned for the selected users.
7. Select **Create**. The skill is created and assigned to the selected users.
8. To update the users for a skill, select a skill, and on the **Edit Skill** dialog, perform the steps to add users and attach a proficiency value.

Create skills using the classic experience

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, select **User management** in **Customer Support**.

2. For **Skills**, select **Manage**.
3. Select **New**.
4. Specify the following in the **New Skill** page.

Field	Description	Example value
Name	Specify the name of the skill.	Spanish **Note:** The name must be unique.
Type	Select a skill type from the dropdown list.	Language
Description	Provide a description of the skill.	This record is used to define the skill level of the Spanish language.

5. Select **Save**.

After you save, the **Users (Agents)** section appears. In this section, you add the agents and rating value. More information: Assign agents to the skill

Rating value of skills

When you add a skill to an agent, you also need to rate the proficiency of the skill. This enables the system to do an exact or closest match against the requirement of a conversation and distribute the conversation accordingly. You can use the default rating model, edit it, or create a new one to match the needs of your organization.

You must provide the minimum and maximum rating value. Also, in the **Rating Values** section, you must create rating value text against each score between the minimum and maximum rating value. This text appears when you're updating an agent's skill and proficiency.

Create a rating model

You can create rating models in the Customer Service admin center, Omnichannel admin center, or Customer Service Hub apps.

1. Perform the steps by using one of the following apps.

    - In the site map of Customer Service admin center, select **Insights** in **Operations**.
    - In the site map of Omnichannel admin center, select **User attributes** in **Advanced settings**.
    - In the site map of Customer Service Hub, go to **Service Management**, and select **User attributes** in **Unified Routing**.

2. In the **Skill-based routing** section, select **Manage**.
3. On the **Omnichannel Configuration** page, in the **Rating Model** section, select **New Rating Model**.
4. Specify the following in the **New Rating Model** page.

Tab	Field	Description	Example value
General	Name	Specify a name for the rating model.	Language rating model
General	Min Rating Value	Provide a minimum rating value.	1
General	Max Rating Value	Provide a maximum rating value.	10

5. Select **Save**. The **Rating Values** section appears.
6. Select **New Rating Value**. The **New Rating Value** page appears.
7. Specify the following.

Field	Description	Value
Name	Specify a name for the rating value.	★★★★★★★★★★ **Note:** This is an example value.
Value	Provide a value.	10 **Note:** This is an example value.

8. Select **Save and Close** to save and add the rating value to the grid.
9. Select **New** to add other rating values and repeat steps 4 and 5.
10. Select **Save** to save the rating model changes.

Recommended proficiency level

We recommend that you use a rating model with minimum value as 1 and maximum value as 10, and define the rating values accordingly.

For example:

Rating value name	Value

Rating value name	Value
★★★★★★★★★★	10 star
★★★★★★★★★	9 star
★★★★★★★★	8 star
★★★★★★★	7 star
★★★★★★	6 star
★★★★★	5 star
★★★★	4 star
★★★	3 star
★★	2 star
★	1 star

Add agents as bookable resource in the classic experience

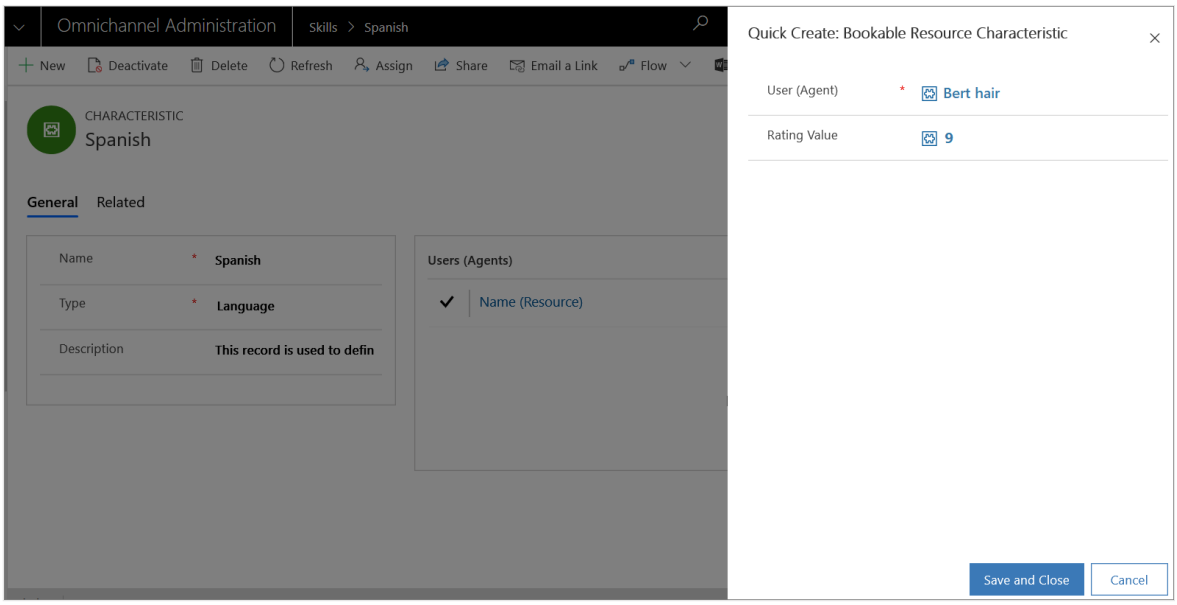
Add the agents as a bookable resource so that you can assign skills to them. This task is required for classic experience only and not for the new skills hub experience.

1. Go to the users page in any of the administrator apps.
2. Select a user from the list and select the **Omnichannel** tab.
3. Select **New Bookable Resource** in the **Skills Configurations** section. The **New Bookable Resource** page appears.
4. Specify the name of the user in the **Name** field.
5. Select **Save**.

Assign agents to skill

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

1. In the site map of Omnichannel admin center, select **User attributes** under **Advanced settings**, and then select **Manage** for **Skills**.
2. Select a skill from the list for which you want to assign the agents.
3. Select **New Bookable Resource Characteristic** in the **Users (Agents)** section. The **Quick Create: Bookable Resource Characteristic** pane appears.
4. Select an agent name for the **User (Agent)** field. Only the name of the agents who are added as Bookable Resources appears in the dropdown list.
5. Select a rating value from the list. The values that appear are based on the rating model and rating values that you created. More information: Rating value of skills.
6. Select **Save and Close**. The agent you added is displayed in the grid.



7. Repeat steps 3 through 6 to add more agents to the skill.
8. Select **Save**.

Alternatively, you can also add a skill to the user (agent). More information: Manage users.

See also

Overview of skill-based routing
Manage users
Model data tables as skills

Enable agents to update skills

Article • 03/08/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

By default, skill-based routing is enabled. You can create skills to attach to agents and define proficiency levels by using a rating model. You can also enable your agents to add or remove skills for their assigned work items at runtime. To do this, you must enable the update skill control toggle in the Customer Service admin center or Omnichannel admin center app.

> **Note**
>
> By default, the skill control is available only for messaging channels. For the records channel, you'll need to customize the form to add the skill control. More information: **Add a skill control for routed records**

Prerequisite

To ensure that the skill control is loaded and displayed properly for the routed records, you must allow access to these websites.

Enable agents to update skills at runtime

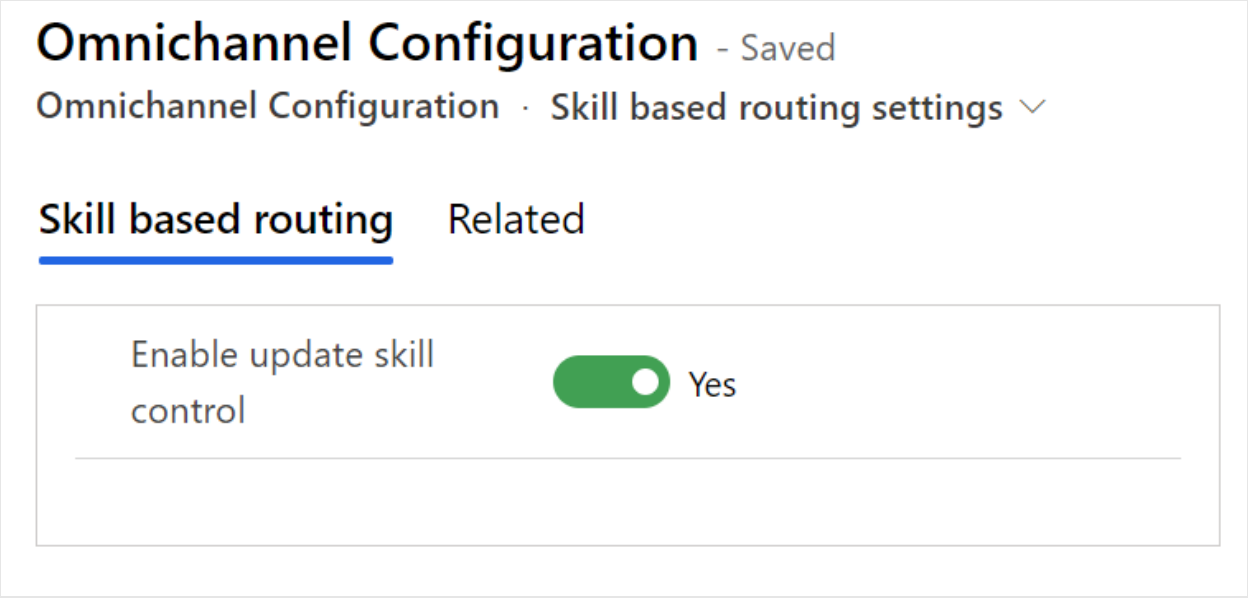
1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, select **User management** in **Customer support**. The **User management** page appears.

2. Select **Manage** for **Skill-based routing**.

3. On the **Skill based routing** tab, set the **Enable update skill control** toggle to **Yes**.



By enabling your agents to evaluate and update skills required for their work items, you make use of your agents' experience to identify the actual skills that are required for the work items. These skills are also used in training the skill finder model. Accurate data on skills improves the model accuracy and prediction. More information: Retrain skill finder model

See also

Overview of skill-based routing
Set up skills and assign agents

Set up skill-based routing in unified routing

Article • 09/19/2023

The steps to configure skill-based routing are as follows:

1. Create a rating model.
2. Create skill types and skills.
3. Assign agents to skills.
4. Set exact or closest match as the default skill-matching algorithm for a workstream.
5. Choose one of the following skill-classification methods:

    - Author logical classification rules to attach skills for a workstream.
    - Set up intelligent skill finder model and author machine learning-based classification rules to attach skills.

6. Choose out-of-the-box assignment method or author a custom assignment method for a queue.
7. Enable skill control for the agent.

How skills are matched

This section explains how the default skill match algorithm works when you set the value as exact match or closest match in a workstream. When the work classification skill rules attach skills and proficiency level, the assignment method matches the required skill with the skills of the agent. Then the system assigns the conversation to an agent based on the chosen skill criteria.

The default skill-matching algorithm works with the out-of-the-box assignment method only. If you use the custom assignment method, then you'll need to write the conditions to achieve skill-based routing. The rules written for custom assignment override the algorithm in the work distribution settings of the workstream.

You can achieve the following skill matching based on the business requirements:

- Exact skill match
- Closest or nearest skill match

When you select one of these skill-matching types, you must configure the skill attachment rules for the conversation to be routed to the correct agent.

Exact match

In exact skill matching, the assignment logic searches for an agent with the required skills and proficiency.

Exact match filters all matched agents whose rating value is greater than or equal to the required value, and then orders them based on the higher available capacity, capacity profile, or round robin as per the selected order by attribute.

If an agent isn't available with all the required skills and corresponding proficiency, then the conversation remains unassigned in the queue.

You can configure exact skill match in one of the following ways:

- In the work distribution settings of the workstream, set the value for **Default skill matching algorithm** as **Exact Match**. In the assignment method of the queue, choose highest capacity or round robin assignment method. The exact match algorithm is not applicable to work items if custom assignment method is applied to a queue. You'll need to write rules to achieve exact match for the custom assignment method.

- Create a custom assignment method and create rules on attribute user skills:

  In exact skill match, as part of custom assignment method, you can write rule conditions to enable assignment logic to search for agents who match all the required skills or match all skills within a skill type. The matched agents can be ordered using the following order by options:
  - Nearest proficiency
  - Nearest proficiency within skill type
  - Most proficient
  - Most proficient within skill type
  - Skill count
  - Skill count within skill type
  - Round robin
  - Capacity

  For example, order by nearest proficiency or most proficiency will have the agent with skill proficiency nearest to required proficiency or highest proficiency at the top accordingly. It can be configured within a skill type as well.

  The following table lists a few examples of how skills are matched and results are ordered when the algorithm is "exact match".

Skills required	Agent characteristics	Scenario description	Rule condition	Order by/Result
◦ Cafe A-100 (Type: Product); Proficiency required: 2 ◦ Spanish (Type: Language); Proficiency required: 3	◦ Name: Carlos; Capacity: 100; Cafe A-100 (2); Spanish (3) ◦ Name: Eric; Capacity: 200; Cafe A-100 (3); Spanish (4)	Exact match all skills	Agent.User skills. Exact match.All skills AND (optional) Agent.PresenceStatus Equals Conversation.Work Stream.Allowed Presences AND Agent.Available capacity >= Conversation.Work Stream.Capacity	Choose from one of the Order by options: ◦ **Available capacity**: Eric ◦ **Nearest Proficient**: Carlos ◦ **Most Proficient**: Eric
◦ Cafe A-100 (Type: Product); Proficiency required: 2 ◦ Spanish (Type: Language); Proficiency required: 3	◦ Name: Carlos; Capacity: 100; Cafe A-100 (2); Spanish (3) ◦ Name: Eric; Capacity: 200; Cafe A-100 (3); Spanish (4)	Exact match language skill only	Agent.User skills.Exact match.Skill type: Language AND (optional) Agent.PresenceStatus Equals Conversation.Work Stream.Allowed Presences AND Agent.Available capacity >= Conversation.Work Stream.Capacity	Choose from one of the order by options: ◦ **Available capacity**: Eric ◦ **Nearest Proficient**: Carlos ◦ **Most Proficient**: Eric

Closest Match

When finding an agent at the earliest is more important than waiting for an agent with exact required skills, unified routing provides with an option to order agents using proficiency or skill count and thereby achieving closest skill match.

Closest match orders all agents based on their closeness to the required skill and proficiency. For example, if the required skills are four, then agents with four skills will be put on top (exact qualified), then agent with five skills (overqualified), followed by agent with three skills (under qualified).

If no agent is available with any of the required skills, then the conversation might be assigned to an agent without any required skills.

You can achieve closest skill match in one of the following ways:

- In the work distribution settings of the workstream, set the value for **Default skill matching algorithm** as **Closest Match**. In the assignment method of the queue, choose highest capacity or round robin assignment method.

  In this scenario where closest match is chosen as the skill matching algorithm at workstream level, and round robin or highest capacity assignment method is chosen; if more than one agent with same skill score is there; the system won't order them by round robin or highest capacity. The system will continue to assign all the incoming work items to the same agent until other constraints like capacity and presence are satisfied.

- Create a custom assignment method and create order by using proficiency or skill count to achieve closest match.

  You need to select order by > Proficiency > All skills or skill type > Nearest Proficient.

  In closest skill matching as part of custom assignment method, you can choose from the following order by options:
  - Nearest proficiency
  - Nearest proficiency within skill type
  - Most proficiency
  - Most proficiency within skill type
  - Skill count
  - Skill count within skill type

  The following table lists a few examples of how the skills are matched and results are ordered when the default skill-matching algorithm is "closest match".

Skills required	Agent characteristics	Scenario description	Rule condition	Order by/Result
◦ Cafe A-100 (Type: Product); Proficiency required :2 ◦ Coffee machine (Type: Product); Proficiency required: 3 ◦ Spanish (Type: Language);	◦ Name: Carlos; Cafe A-100 (2); Coffee machine (3); Spanish (3) ◦ Name: Eric; Cafe A-100 (5); Coffee machine (4); Spanish (1) ◦ Name: Jamie; Cafe A-100 (1);	Closest match all skills	Agent.PresenceStatus Equals Conversation.WorkStream.Allowed Presences AND Agent.Available capacity >= Conversation.WorkStream.Capacity	Choose from one of the order by options: ◦ Nearest Proficient: Carlos > Eric > Jamie ◦ Most Proficient: Eric > Carlos > Jamie

Skills required	Agent characteristics	Scenario description	Rule condition	Order by/Result
Proficiency required: 3	Coffee machine (2); Spanish (1)			
◦ Café A-100 (Type: Product); Proficiency required: 2 ◦ Coffee machine (Type: Product); Proficiency required: 3 ◦ Spanish (Type: Language); Proficiency required: 3	◦ Name: Carlos; Cafe A-100 (2); Coffee machine (3); Spanish (3) ◦ Name: Eric; Cafe A-100 (5); Coffee machine (4); Spanish (1) ◦ Name: Jamie; Cafe A-100 (1); Coffee machine (2); Spanish (1)	Closest match product skill only	Agent.PresenceStatus Equals Conversation.Work Stream.Allowed Presences AND Agent.Available capacity >= Conversation.Work Stream.Capacity	Choose from one of the order by options: ◦ Nearest Proficient: Carlos > Eric > Jamie ◦ Most Proficient: Eric > Carlos > Jamie
◦ Café A-100 (Type: Product); Proficiency required: 2 ◦ Coffee machine (Type: Product); Proficiency required: 3 ◦ Spanish (Type: Language); Proficiency required: 3	◦ Carlos Cafe A-100 (2); Coffee machine (3); Spanish (3) ◦ Name: Eric; Cafe A-100 (5); Coffee machine (4) ◦ Name: Jamie; Cafe A-100 (1)	Closest match with all skills using skill count	Agent.PresenceStatus Equals Conversation.Work Stream.Allowed Presences AND Agent.Available capacity >= Conversation.Work Stream.Capacity	Order by option: Skill count: Carlos > Eric > Jamie
◦ Cafe A-100 (Type: Product); Proficiency required: 2 ◦ Coffee machine (Type: Product); Proficiency required: 3	◦ Name: Carlos; Cafe A-100 (2); Coffee machine (3); Spanish (3) ◦ Name: Eric; Cafe A-100 (5); Coffee machine (4);	Closest match product skill only using skill count	Agent.PresenceStatus Equals Conversation.Work Stream.Allowed Presences AND Agent.Available capacity >= Conversation.Work Stream.Capacity	Order by: Skill count: System will randomly pick from Carlos or Eric

Skills required	Agent characteristics	Scenario description	Rule condition	Order by/Result
◦ Spanish (Type: Language); Proficiency required: 3	◦ Name: Jamie; Cafe A-100 (1);			

> **Note**
>
> We recommend that you use the same rating model across skills. However, if skills that belong to different rating models are there, then the system will normalize and calculate the skill scores.

See also

Overview of skill-based routing
Overview of unified routing
FAQ on unified routing

Set up intelligent skill finder model

Article • 09/19/2023

To configure machine learning-based skill classification rulesets, you can configure intelligent skill finder models that can be used for predicting skills.

You can create, test, and train machine-learning models that use AI to determine the necessary skills for new work items and by using the data in Microsoft Dataverse. However, if you're trying to set up the model in a new organization or if skill-based routing wasn't in use, you might not have the needed skill data. In such conditions, you can use data from another application by using the **Import from Excel** option in the skill finder model.

Intelligent skill finder depends upon the custom AI Builder category classification model. Therefore, AI Builder should be available in the geographical region where you want to use intelligent skill finder. More information: Availability of AI Builder.

> **ⓘ Important**
>
> If you want to import skill finder models from one environment to another, make sure that you import and export between environments of the same type. A model trained in test environment will work in another test environment only and not in a production environment.

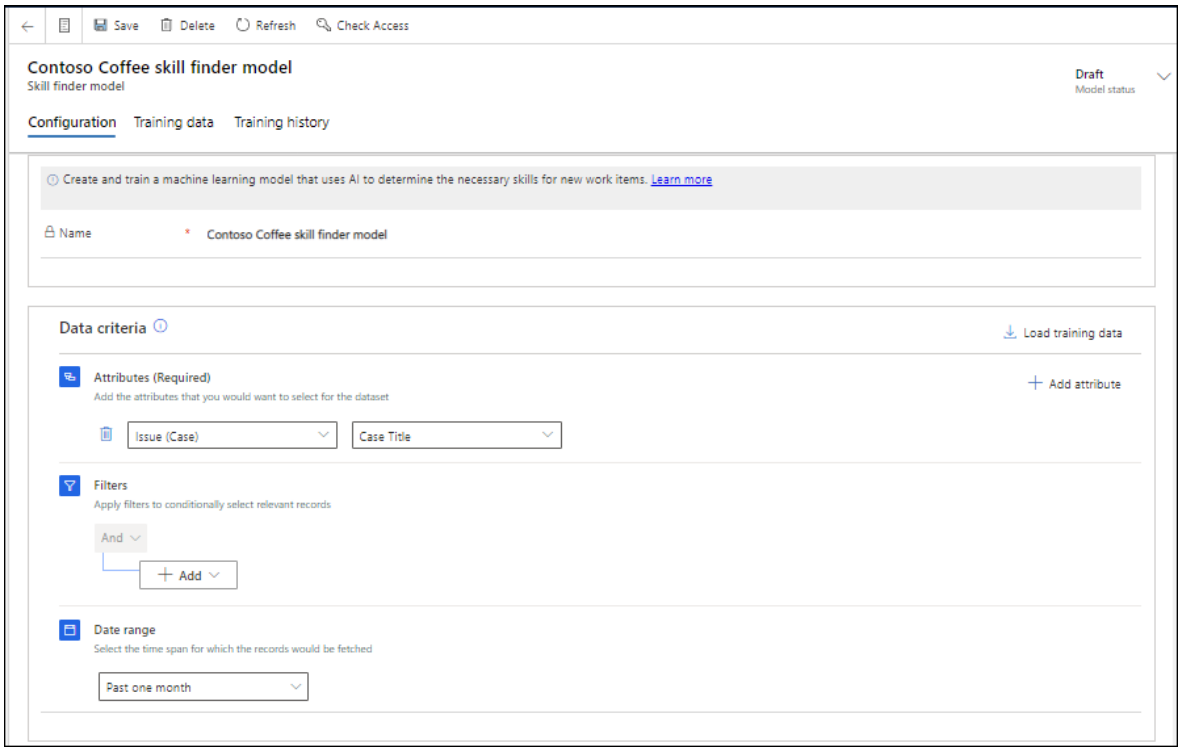
Create skill finder models

You can create as many intelligent skill finder rating models as your business requires.

1. In the Customer Service admin center site map, select **Insights** in **Operations**. The **Insights** page appears.
2. In the **Intelligent skill finder** section, select **Manage**.
3. On the **Intelligent skill finder models** page, select **New**, and on the **Configuration** tab of **New skill finder model** page, enter a name.
4. In **Data criteria**, enter the following to form the dataset records:
    - **Attributes (Required)**: Select attributes in the Attributes and related list to form the training dataset. The corresponding attribute values will be merged

in the sequence they are added and will be used to form the input string for the model training data.

- **Filters**: Optionally, apply filters to conditionally select the relevant records.
- **Date range**: Select a value to set the time period for which the records need to be loaded.



5. Select **Save**, and then select **Load training data**. The **Training data** tab appears and displays the data load status.

6. After the load is complete, review the data, and edit the records if you want to modify the tags.

7. In the **Training data** section, select the checkbox for **Input data** to select all the records, and select **Approve**. You must approve a minimum of 50 records for the model to be trained.

8. Select **Train model**, and select **Train model** again on the confirmation dialog.

9. After the status changes to training completed, select the rows that you want to publish, and select **Publish model**. The skills model is ready for use.

Test the model

You can test your model to determine if it's working as expected. Perform the following steps to view the performance and accuracy of the model.

1. In Power Apps, select the environment that contains your solution.

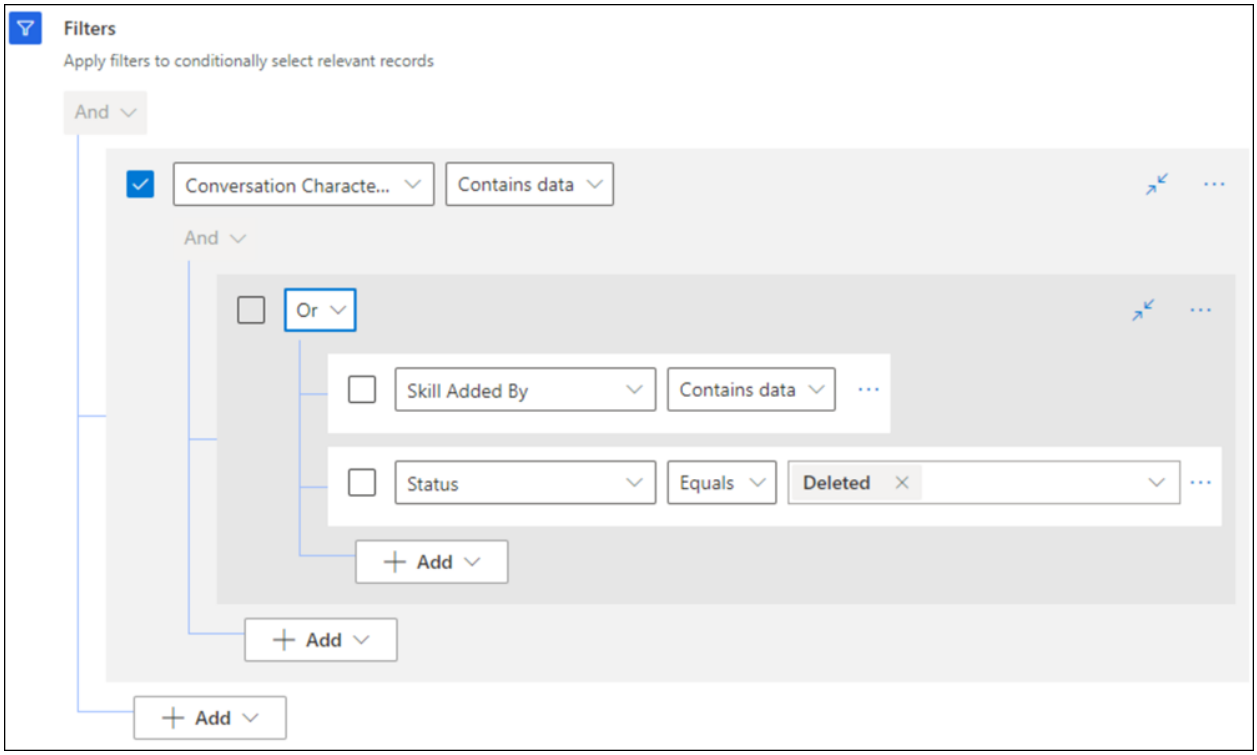
2. Select **AI models**. You can view the models you've created in **My models** and the models that are shared to you in **Shared with me**. Select the required model.
3. Select **Quick test**. To get model related information, select vertical ellipsis beside **Quick Test** button, and then select **Download detailed metrics**. The metrics file contains information about model's performance, accuracy, and precision. For more information, see Understand category classification model performance
4. In **Text**, enter the required text, and then select **Test**. The predicted tags appear in **Suggested tags and confidence**.
5. When the model runs, if the predicted tags match with available skills in the organization, the corresponding skills are linked to the model.

Retrain the model iteratively

You should retrain your published model iteratively to improve the model with new data in Microsoft Dataverse. For example, model retraining can be done by using the records in which agents have updated the skills for records or conversations. When you retrain the model to include the skills added by agents, review the training data records after loading it to make sure it meets the required skill criteria.

For information about how your agents can update skills, see Manage skills. To enable your agents to update skills at runtime, see Enable agents to update skills.

You can define the conditions as seen in the following screenshot.



Use training data from the Excel file

If you don't have data to train your model, you can populate skills and attributes data in Excel files and upload them to the application by using the import feature of Microsoft Dataverse.

To use the data from the Excel files, you must make sure of the following:

- The model name in the application should match the name in the Training record column of the Excel file.
- Name the files as msdyn_ocsitrainingdata.csv and msdyn_ocsitdskill.csv.
- Ensure that the input data string is less than or equal to 5000 characters to avoid truncation.

A sample of each file is as follows. You can select the links to download the sample files.

msdyn_ocsitrainingdata.csv

Skill finder model	Training record name	Input data
CCSFM01-Contoso Coffee skill finder model	CCSFM01-Contoso Coffee training data A10001	Hi, I work at Trey Research. One of the automatic espresso machines is becoming overheated and starts giving a burning smell after 30 minutes of usage. Please help! Yes. No.
CCSFM01-Contoso Coffee skill finder model	CCSFM01-Contoso Coffee training data A10002	Hi, I recently bought Café A-100 coffee machine and its top plate is getting heated after 15 minutes of usage. Please resolve this at the earliest.
CCSFM01-Contoso Coffee skill finder model	CCSFM01-Contoso Coffee training data A10003	Hi, I am unable to start my recently bought espresso machine, looks like the electrical plug provided with it is not functioning.
CCSFM01-Contoso Coffee skill finder model	CCSFM01-Contoso Coffee training data A10004	Hi, I work at Trey Research. I am looking for replacement of coffee machine purchased 3 months ago. Even after raising complaints earlier about overheating the issue still persists. Please help!
CCSFM01-Contoso Coffee skill finder model	CCSFM01-Contoso Coffee training data A10005	Hi, my recently bought Café A-100 machine is not in the color I ordered. Please replace the same.

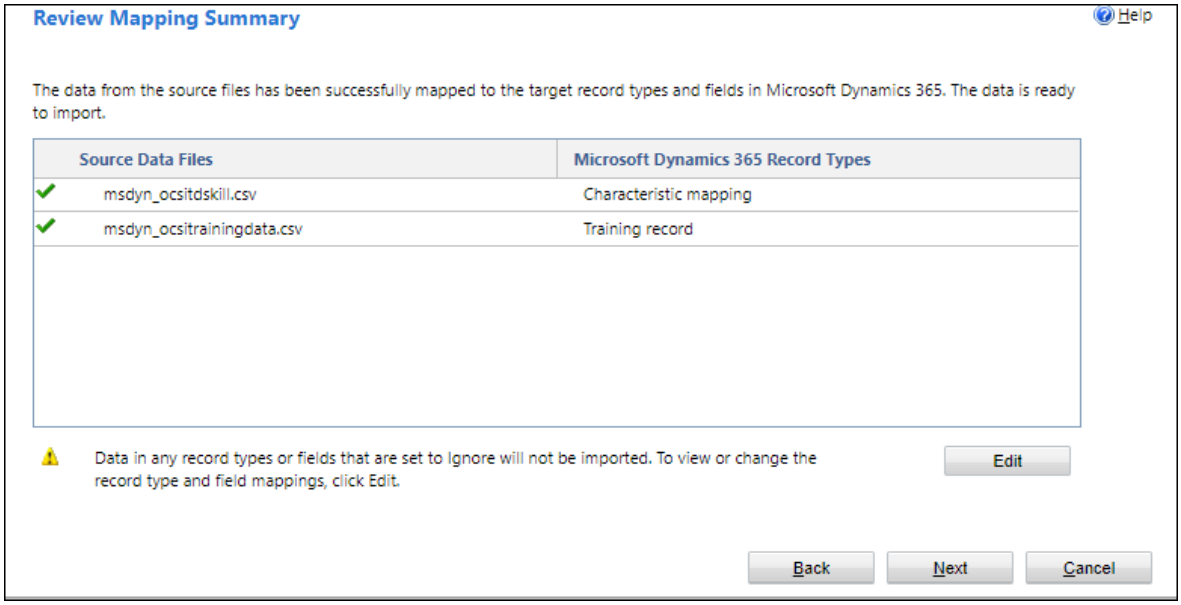
msdyn_ocsitdskill.csv

Training record	Characteristic mapping	Characteristic
CCSFM01-Contoso Coffee training data A10001	Café A-100	Café A-100

Training record	Characteristic mapping	Characteristic
CCSFM01-Contoso Coffee training data A10001	Heating	Heating
CCSFM01-Contoso Coffee training data A10001	Electrical	Electrical
CCSFM01-Contoso Coffee training data A10002	Café A-100	Café A-100
CCSFM01-Contoso Coffee training data A10002	Heating	Heating

Perform the following steps to upload the data for training your model:

1. On the **Skill finder model** page, enter a name for the model, and then save the form.
2. Select the **Training data** tab, and select **Import Excel**.
3. Select the .csv files to upload in the import tool.



4. Review the upload settings, and select **Finish** after you go through the stages. The data upload starts. The time taken for the data upload depends on the number of records.
5. Optionally, you can select **Refresh** to see the updated status of the data upload.
6. Perform steps 5 through 8 in Create skill finder models to approve, train, and publish your model.

See also

Overview of skill-based routing
Overview of unified routing

Set up skill-based routing in unified routing

Model existing tables as skills

Article • 06/26/2023

Organizations can use existing data tables and model them as skills to perform skill-based routing. With this approach, you can avoid recreating data definitions as skills in Dynamics 365, and you won't need to write classification rules to stamp skills on the incoming work items. By modeling existing tables as skills, managing data becomes easier. The following examples illustrate two common scenarios.

- **Example 1**: Use an existing system table to model a skill

  A customer calls a company's support line for help with a product. An agent creates a case in Dynamics 365 Customer Service. The case is created with “Product” as one of the fields. The relationship between product name and product type is already established in the system. Agents are trained to troubleshoot issues with the company's products—that is, they're "skilled" on the product. Therefore, the company can model "Product" in the Cases table as a skill and assign product types as skills to its agents.

- **Example 2**: Use an existing custom table to model a skill

  A company has created a column called "Operating market" in a custom table in live chat. Whenever a customer starts a chat with a support agent, "Operating market" automatically stores the customer's location. Agents are trained to manage the expectations and requirements of customers in specific operating markets—that is, they're "skilled" on those markets. Therefore, the company can model "Operating market" in the custom table as a skill and assign markets as skills to its agents.

How modeling tables as skills differs from traditional skill-based routing

Say you have multiple product categories and attributes already configured in your system, such as all your cases populated with "Product" and "Customer" information. To use traditional skill-based routing, you would:

- Enter all your products and customers as skills.
- Assign those skills to agents.
- Create classification rules to add "product" and "customer" skills to incoming work items.

Whenever you added a new product or customer, you'd have to:

- Create a new skill for the new product or customer.
- Assign the new skill to agents.
- Update your classification rules.

Traditional skill-based routing results in duplicated data and effort because you're creating skills from product and customer data you've already entered.

However, if you model the "Product" and "Customer" columns in your tables as skills, you eliminate duplication of both data and effort—and you don't need to write classification rules.

How to model a table as a skill

To model data in a table as a skill, you'll need to do the following steps:

1. Create a column for the new skill.
2. Add the column to the Skill Main form so that it's visible in the Customer Service admin center app.
3. Assign a value to the skill and assign the skill to agents.
4. Finally, add the skill as a condition in an assignment rule.

In this example, we model a skill on data in the **Products** table.

Create a skill column

1. Sign in to Power Apps, and then select the environment that contains your default solution.

2. In the left navigation pane, select **Solutions**, and then select **Default Solution**.

3. In the left panel, select the **Tables** object, and then select the **Characteristic** table.

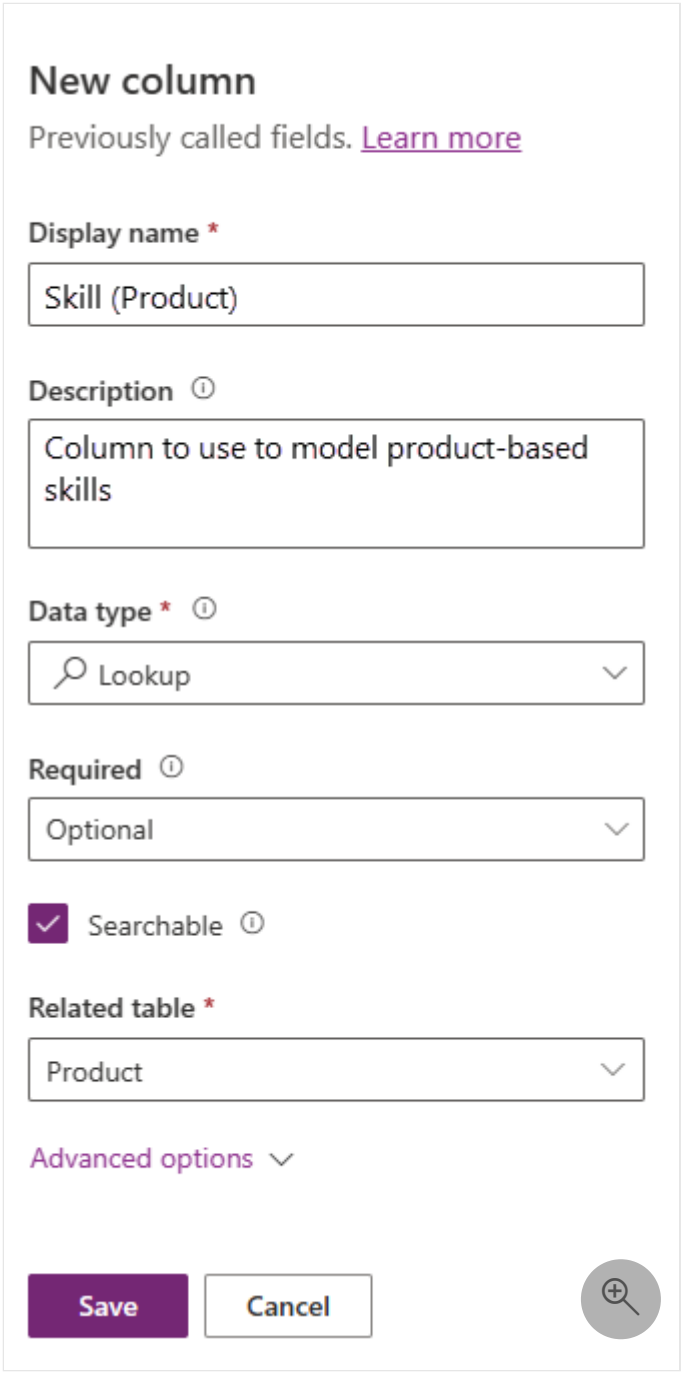
4. Under **Schema**, select **Columns**.

5. Select **New column**.

6. Enter a name and description. In this example, we've named the column **Skill (Product)** to indicate the skill is based on products, but you can enter any name that's meaningful.

7. In the **Data type** list, select **Lookup** > **Lookup**.

8. In the **Related table** list, select the table that contains the column you use to model the new skill.



9. Save the new column.

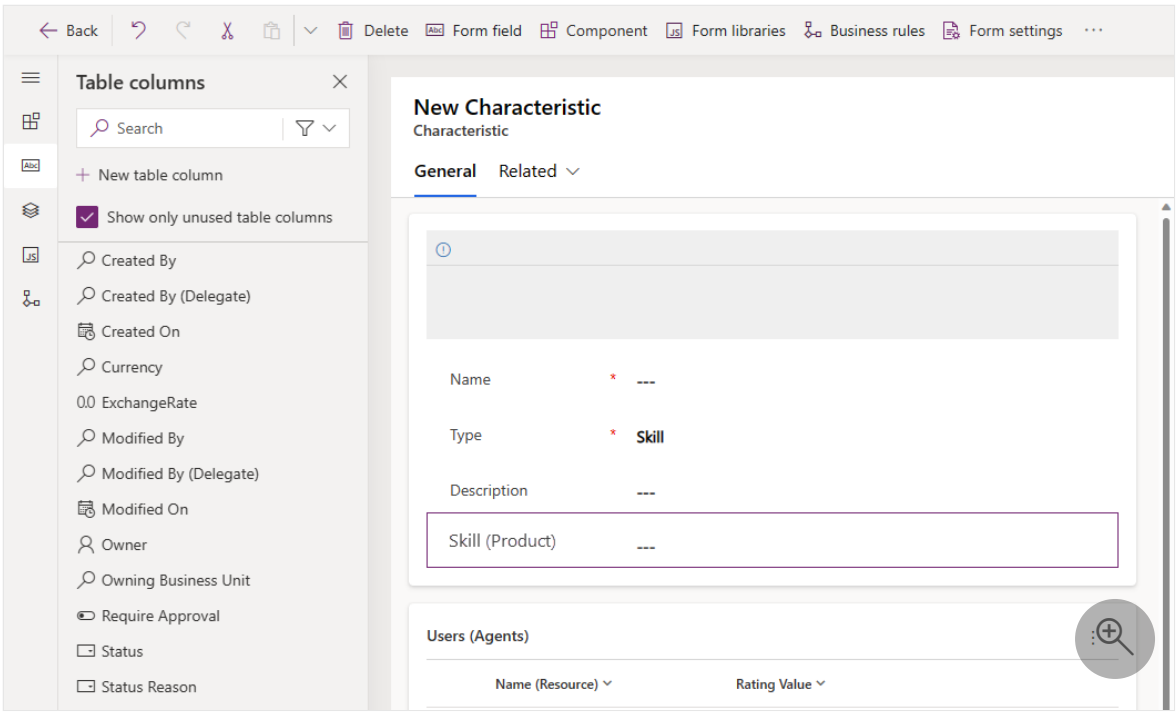
10. Return to the **Solutions** page and select **Publish all customizations**.

Add the column to the Skill Main form

1. In Power Apps, in the left navigation pane, select **Tables**, and then select the **Characteristic** table.

2. Under **Data experiences**, select **Forms**, and then select the **Skill Main Form**.

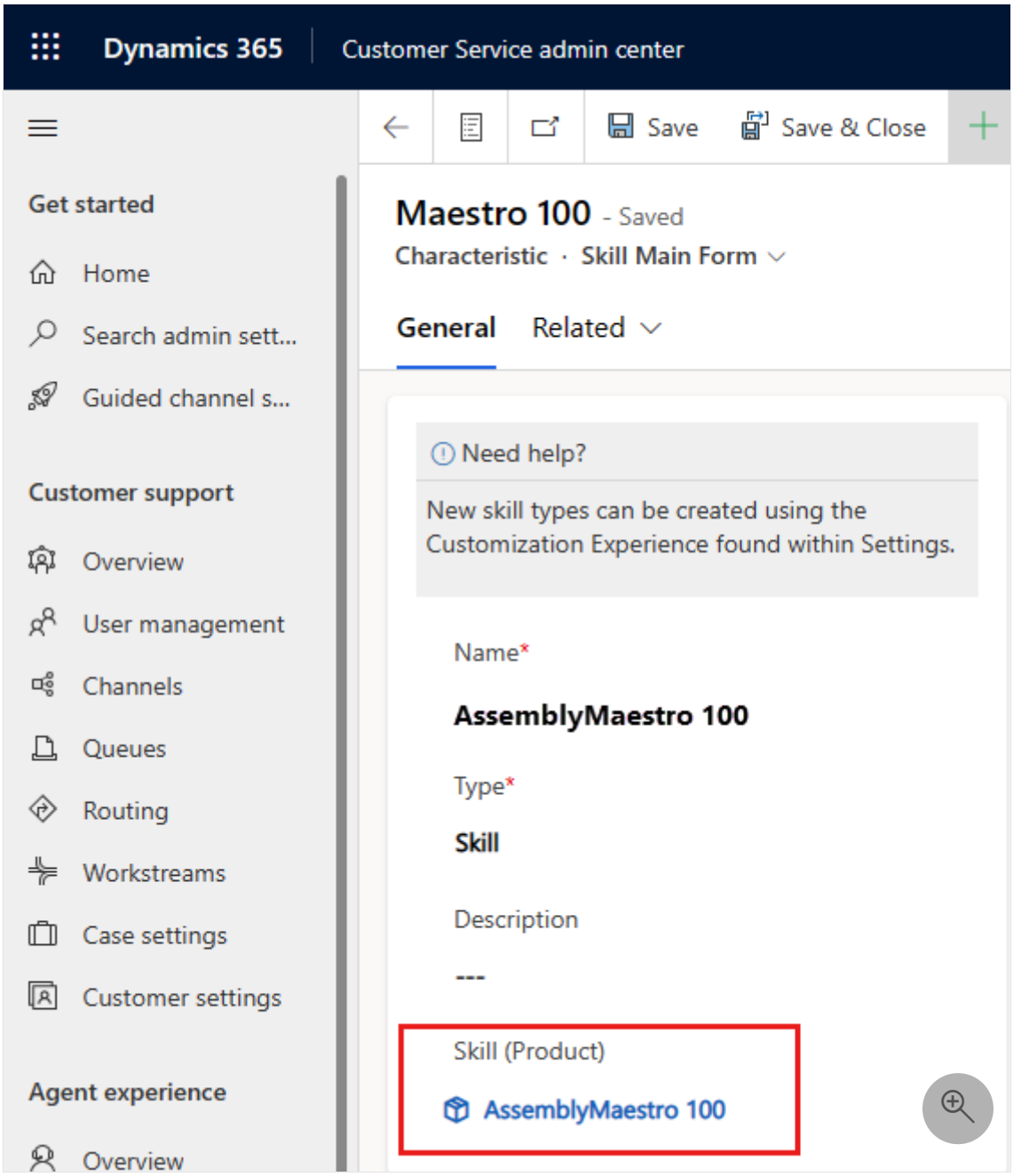
3. Drag the new column from the list of table columns in the left panel to the form.



4. Save and publish the form.

Assign a value to the skill

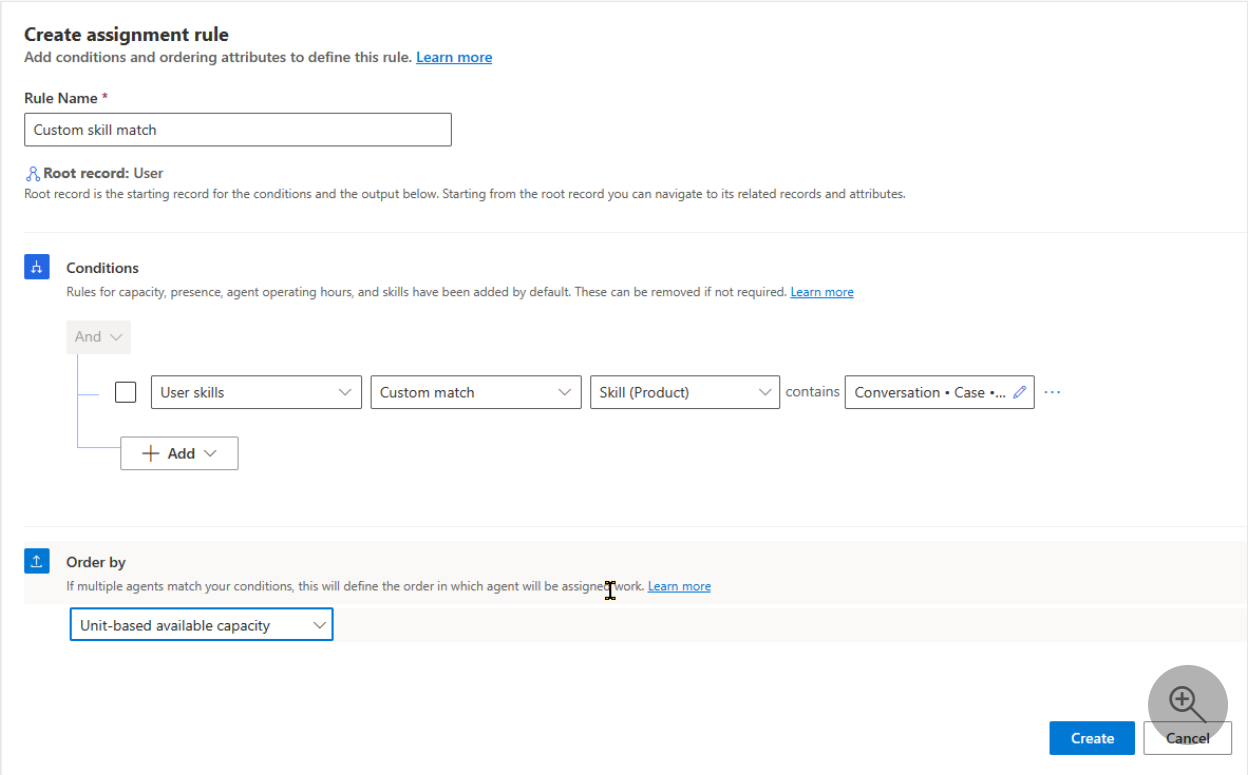
1. Open Customer Service admin center. Under **Customer Support**, select **User management**.
2. To the right of **Skills**, select **Manage** to open the **Active Characteristics** view.
3. Select **New**.
4. Enter a name, and optionally a description, for the new skill.
5. In the **Type** list, select **Skill**.
6. In the skill column lookup, search for and select a value. In our example, we've selected the product **AssemblyMaestro 100**.



7. Select **Save**.

8. Assign the skill to agents as needed.

Finally, add a condition based on the new skill to an assignment rule.



Model other data as skills

You can model as a skill any attribute or category you like and match agents with work items using them. You won't have to write classification rules for each skill, saving time and effort in maintenance, especially when attributes or categories change frequently. Using this approach, you can maintain the modeled skills at agent level and change the lookup to the new or updated value when it changes.

Things to consider

- Intelligent skill finder doesn't predict custom attributes that are modeled as skills.
- Modeled skills aren't included in skill analysis reports and they don't appear as skills in the agent skill control.
- Out-of-the-box assignment methods don't support skill match for modeled skills.
- Routing diagnostics don't display modeled skills that were matched during assignment.
- Modeled skills must be of the "lookup" data type.
- Order by proficiency isn't supported for modeled skills.

Next steps

Overview of skill-based routing

Set up skills, create a rating model, and assign agents

Use sentiment prediction-based model in work classification (preview)

Article • 10/03/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

Introduction

Sentiment prediction for routing enables organizations to use the end customer sentiment scores as a factor in classifying work items to route to agents.

By using sentiment prediction for routing, you can write rules to classify work items and assign them to agents who are best equipped to handle them.

The sentiment prediction uses the following seven-point scale that allows organizations flexibility to build nuanced rules while maintaining simplicity.

- Very positive
- Positive
- Slightly positive
- Neutral
- Slightly negative
- Negative
- Very negative

The sentiment model is configured to look for and use the messages provided by the customer and doesn't consider agent chat strings.

Enable sentiment prediction

To enable sentiment prediction

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, select **Routing**. The **Routing** page appears.

2. Select **Manage** for **Sentiment prediction for routing**.

3. On the **Sentiment Prediction for routing (preview)** page, set the **Enable sentiment prediction for routing** toggle to **Yes**.

Dry run of sentiment prediction

You can optionally test the sentiment model by using the dry run option. You can test using real phrases that you expect to see when customers contact support. It helps you understand what the sentiment prediction on those might look like. You can see key information, such as the sentiment category on the seven-point scale, the sentiment score that is scaled from zero to 100, and keywords from the phrase that influenced the sentiment score.

To test the sentiment model

1. On the **Sentiment Prediction for routing (preview)** page, select **Dry run**.

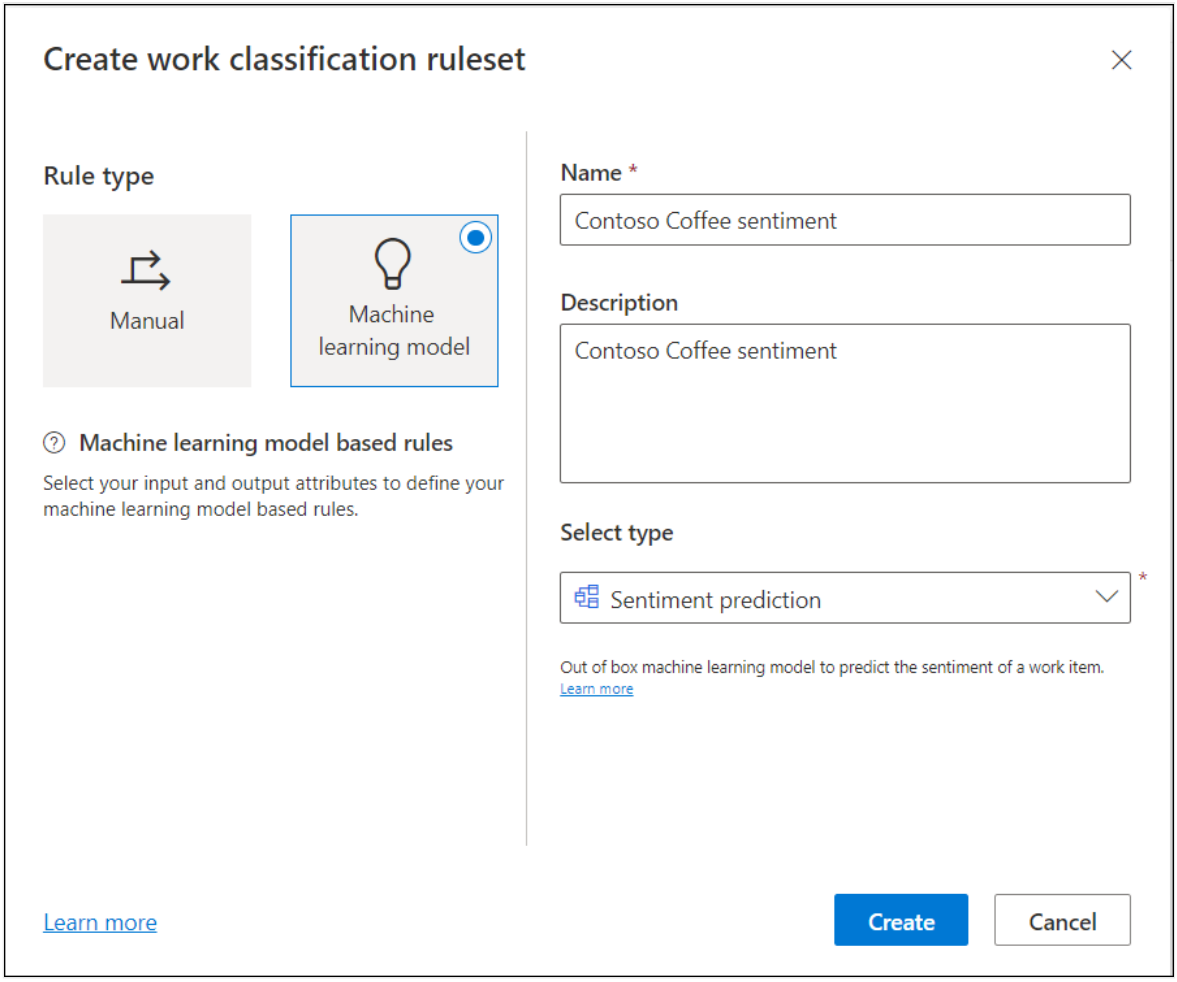
2. On the **Dry run** panel, enter a word or phrase, such as "I am frustrated", and select **Test**. The model predicts the sentiment score, category, and the keyword that helped determine the score.

Create classification rules based on sentiment prediction model

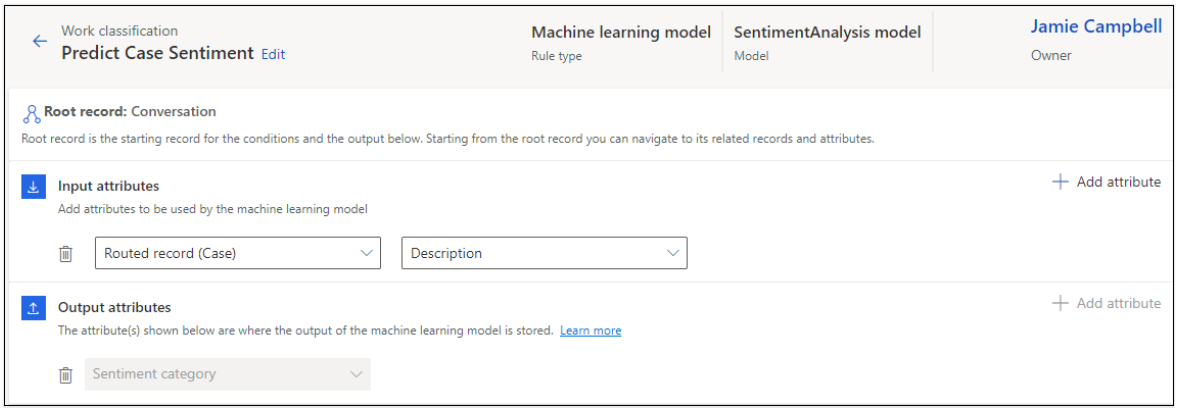
After you enable sentiment prediction, you can create a classification rule based on the machine learning model, and select the type as **Sentiment prediction**. You can use the rule with other rules to help categorize the work items to be routed to the right agents who will help with the customer issue.

To create a rule based on sentiment prediction

1. Create or edit a workstream. More information: Create workstreams
2. Go to the **Work classification (optional)** section to create a classification rule. More information: Configure work classification rulesets
3. In the **Create work classification ruleset** dialog, select the rule type as **Machine learning model**, and then select type as **Sentiment prediction**.



4. Select the input attribute in which the customer sentiment is most likely to be found. For example, for a case workstream, you can select the related entity **Routed record (Case)**, and the attribute as **Description** that might typically contain keywords indicating the sentiment.



For a messaging channel, you'll typically set the related entity as **Context item value (Conversation)**, and then select the attribute. The bot context variables should be set or pre-conversation survey must be set up to be able to use the input attribute. Frame the pre-conversation survey questions such that they elicit the customer sentiment. For example, you could use a question such as "How has been your experience with the product?" or "How can we help you?".

You can define up to 10 attributes, whose values can be used to build the prediction model. At least one attribute, the first one, is mandatory and can't be deleted.

5. Save and close.

While the application doesn't prevent you from creating more than one rule that's based on the sentiment prediction model, a warning message is displayed when you try to create another rule based on the same model.

Additional work classification rules can then be created using the output from the sentiment prediction rule. The output is stored in the **Sentiment Category** attribute. You can use any of the values on the seven-point sentiment output to build the rule.

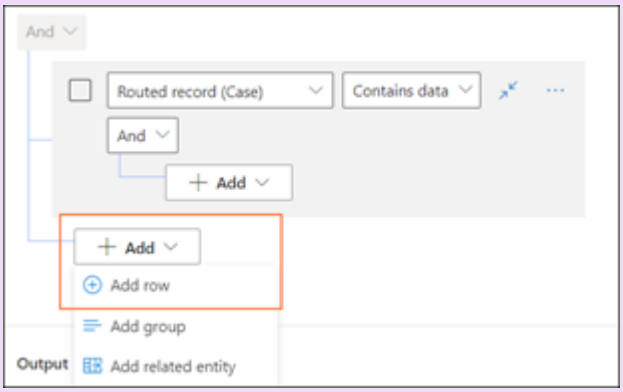
Create route-to-queue rules

Create route-to-queue rules to route the work items based on the sentiment prediction.

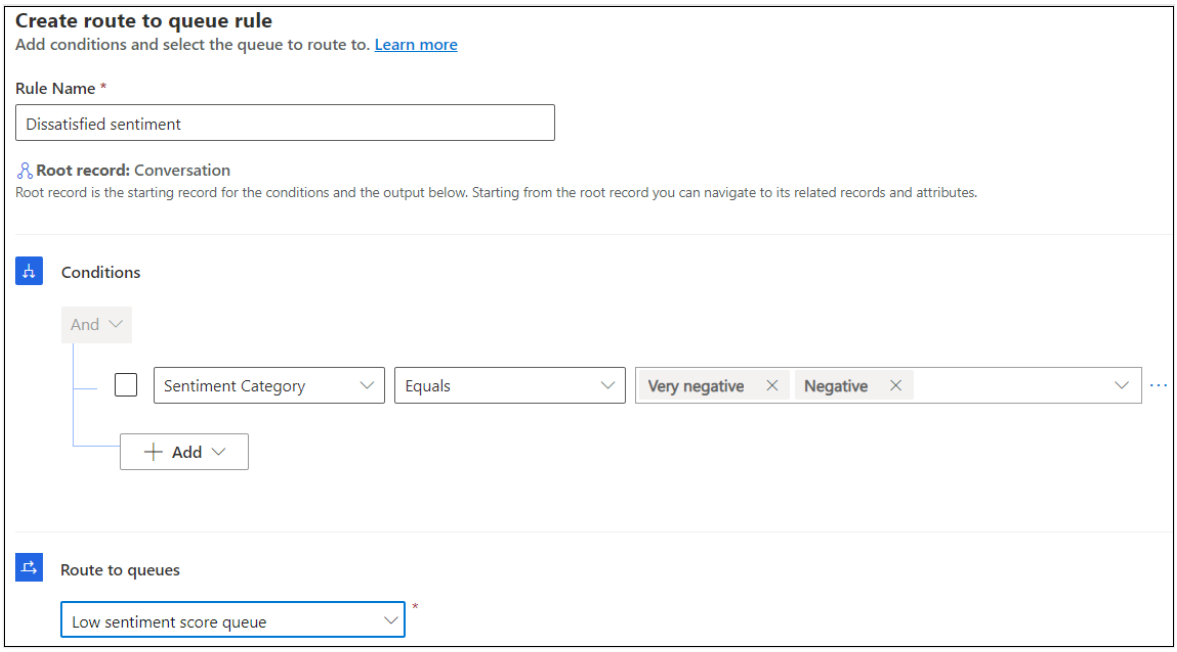
To create route-to-queue rules

1. For the workstream in which you created the rule based on sentiment prediction, in **Routing rules**, select **Create ruleset** or **See more** for **Route to queues** to create a rule. More information: Configure route-to-queues rulesets and rules

2. Create a rule to define conditions. The **Sentiment Category** output attribute contains the sentiment prediction for the work item, and should be used in the rule builder to define the rule.

> **Note**
>
> If you've defined a condition on a routed record, make sure that you use the **Add row** option that's independent of the **Routed record** group.
>
> 
>

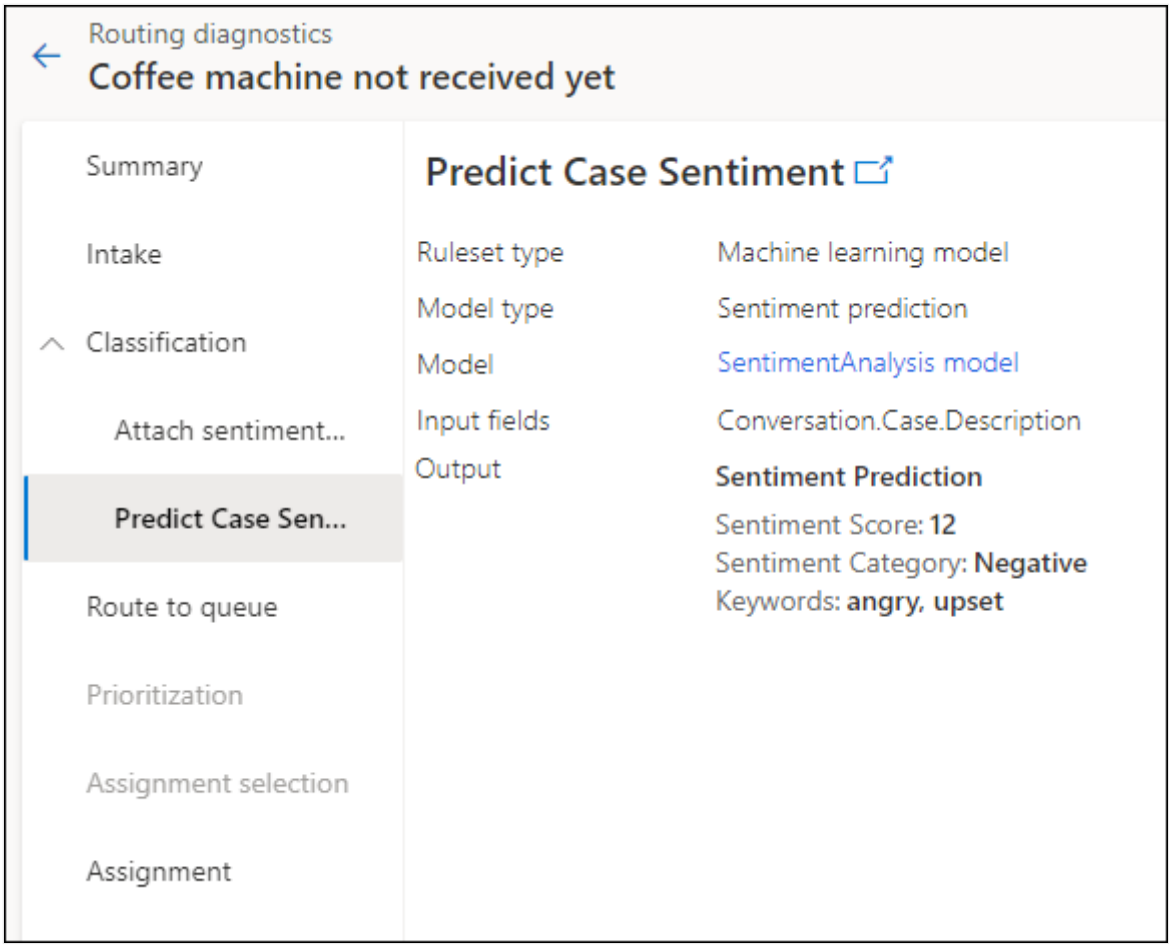
3. Select the queue to which the work items need to be assigned when the conditions are met.



Use diagnostics to analyze the efficacy of sentiment prediction

Routing diagnostics help you see how the work items have been classified and routed after you've configured the rules.

You can view how the sentiment prediction model was used to route a work item.



Language support for sentiment prediction models

All Azure Cognitive Services supported languages are supported in sentiment prediction-based routing. More information: Language support - Translator - Azure Cognitive Services

See also

Overview of unified routing
How to set up unified routing

Use effort estimation model in unified routing (preview)

Article • 10/03/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

You can use the effort estimation model to classify and route work items.

You can use the estimation technique to understand how much time it will take to address a work item, and based on that estimation, route it to the agent who has the bandwidth to manage it.

Effort can be defined as the length of time that's necessary to either resolve a work item or amount of time spent on a work item before it is moved to the next stage as defined by the organization.

Some examples of how effort can be defined are as follows:

- Estimate time for an agent to respond to a customer response through email and assign accordingly
- Estimate time for an agent analysis and assign accordingly
- Estimate time for a full case resolution and assign accordingly

Create effort estimation models

You can create the effort estimation models for any record that is enabled for unified routing. You can provide the context to the model for training by selecting the attributes. At least two attributes are mandatory, and you can specify up to 10 attributes. Attributes that indicate severity and priority are useful.

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

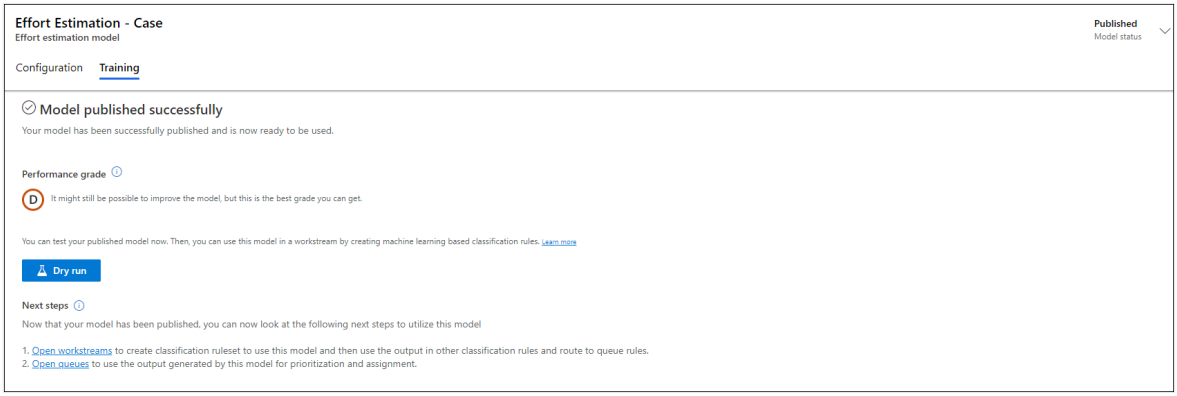
   - In the site map, select **Routing**. The **Routing** page appears.

2. Select **Manage** for **Effort-based routing**.
3. On the page that appears, select **New**.
4. On the **New effort estimation model** page, do the following:
   - **Name**: Enter a name for the model.
   - In **Data summary**, select the record, such as Issue (Case), for which you want to create the model.
   - In the **Attributes** section, select values for the **Categorical description** and **Detailed description** fields. You can add up to 10 attributes to be used to train the model.
   - In **Actual effort calculation**, select one of the following options to determine the time to address an incoming work item:
     - **Single duration field**: Select a single work item attribute where time is captured and the time unit.
     - **Calculated duration**: Select values to indicate the start and end times that define effort.
     - **SLA KPI instance**: Use the SLA KPI instance to calculate the effort. This option enables users to use SLAs as the effort definition where the

timestamps that are captured when a work item that meets its SLA success criteria serves as the effort definition.

- Optionally, define the filter conditions to select only relevant records.
- Optionally, select the date range for the records to be fetched.

5. Review and save the model.
6. Select **Train AI Model**. The **Training** tab displays the status of the training, which could take a couple of hours and depends on the conditions used. After the model is trained, the **Model published successfully** message appears on the page.



7. Optionally, use **Dry run** and select an input value to test the model. The following details are available:

   - **Effort value (minutes)**: The time in minutes that is estimated for the work item to be addressed.
   - **Confidence score**: The degree of confidence in a percentage value of the effort prediction.

Performance grade

The performance grade of the model is indicated by A, B, C, D, E, or F. The letters indicate the quality of the model in the descending order. More information: Prediction models performance

Create classification rules based on effort estimation model

After you train the effort estimation models, you can create classification rules based on the models and use the rules with other rules to help categorize the work items to be routed to the right agents who will help with the issues.

1. Create or edit a workstream. More information: Create workstreams

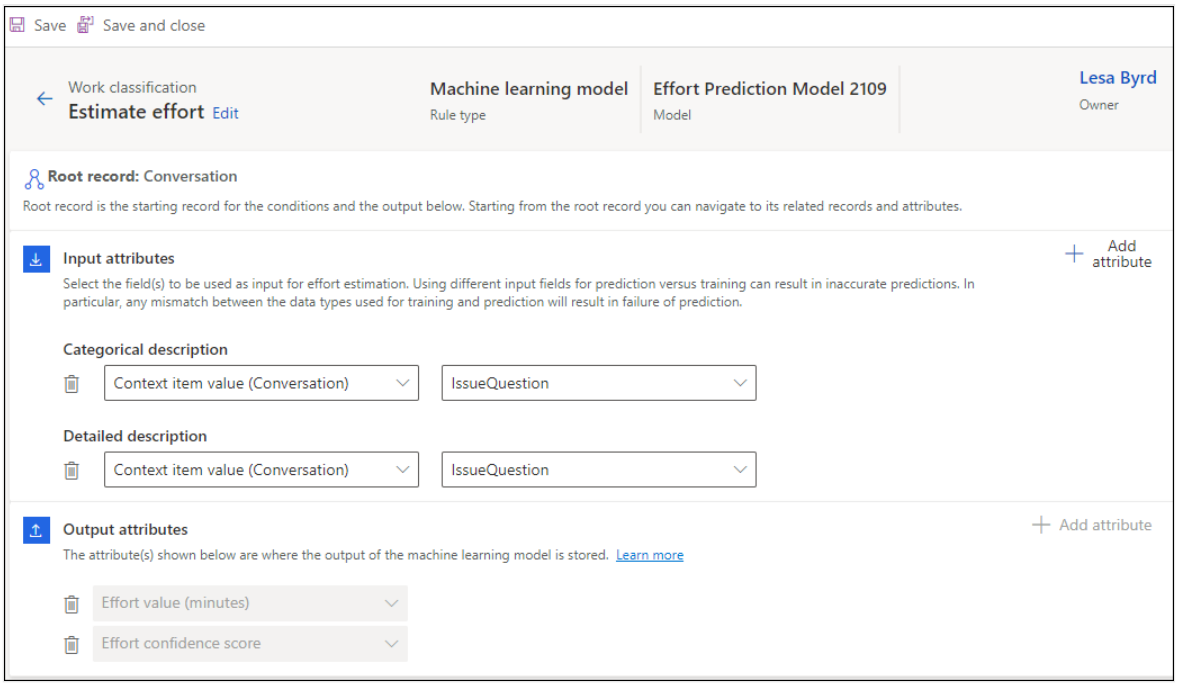
2. Go to the **Work classification (optional)** section to create a classification rule. More information: Configure work classification rulesets

3. In the **Create work classification ruleset** dialog, select the rule type as **Machine learning model**, and then select type as **Effort estimation**.

4. In **Select effort estimation model**, select the model that you want to use for the prediction, and select **Create**.

5. On the page that appears, select the input attributes to use for effort estimation. While you can use up to 10 attributes, the **Categorical description** and **Detailed description** fields are mandatory. By default, the output attributes are **Effort value (minutes)** and **Effort confidence score** and can't be edited.

   For the messaging channels, the bot context variables should be set or a pre-conversation survey must be set up to be able to use the input attributes.



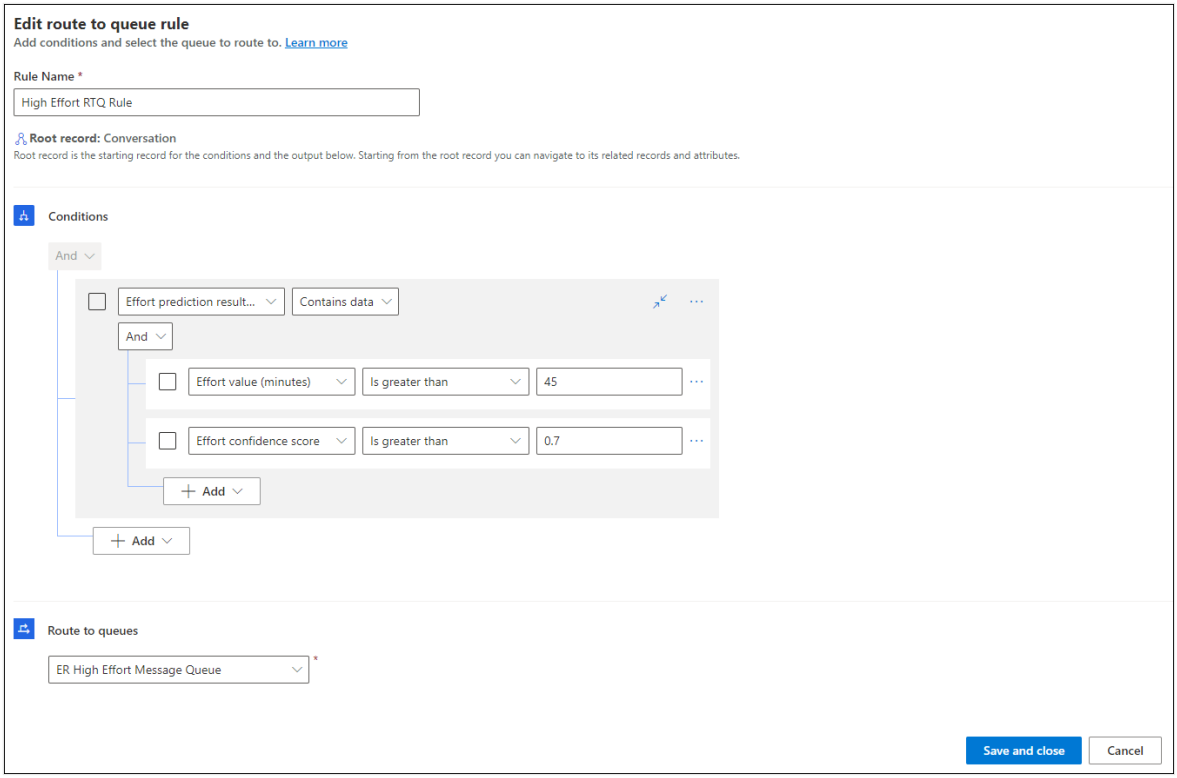
> **Note**
>
> You can have only one effort estimation rule per workstream.

Create route-to-queue rules

Create the route-to-queue rules based on the effort estimation.

1. For the workstream in which you created the rule based on effort estimation, in **Routing rules**, select **Create ruleset** or **See more** for **Route to queues** to create a rule. More information: Configure route-to-queues rulesets and rules

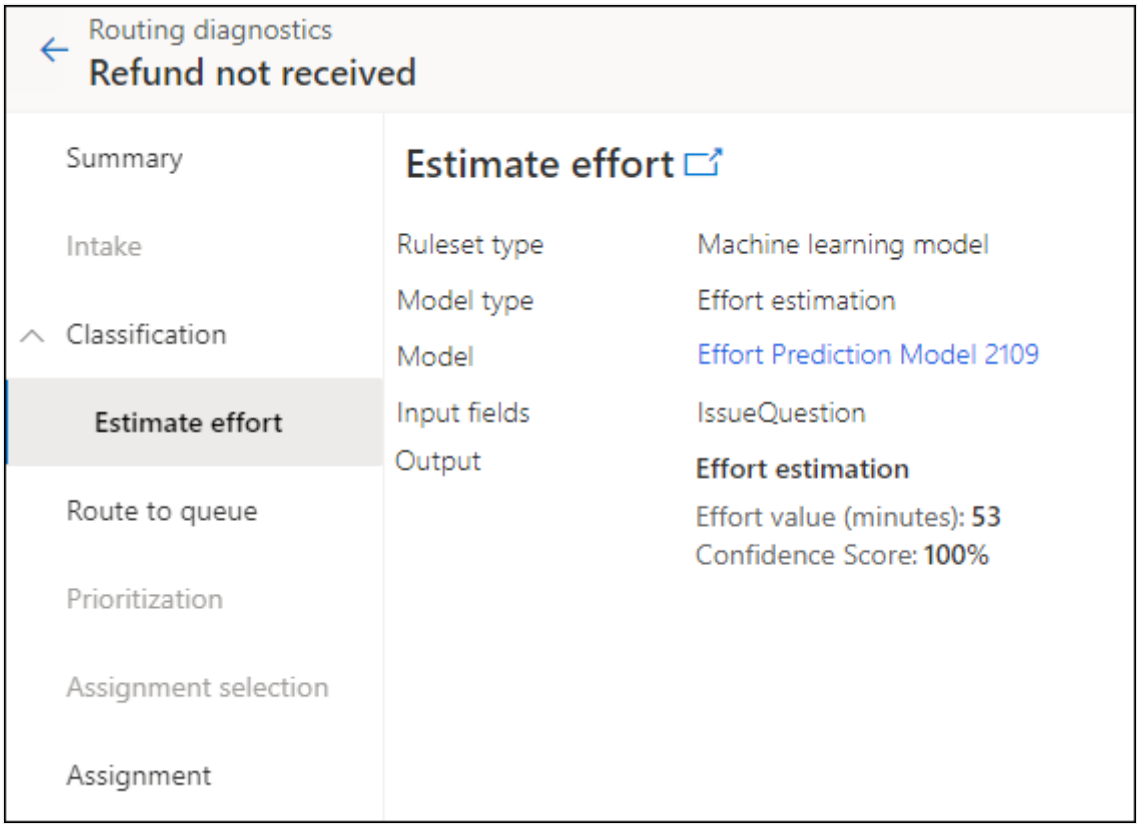
2. Create a rule to define conditions and select the queue to which the work items need to be assigned when the conditions are met.



Use diagnostics to analyze the efficacy of effort estimation models

Routing diagnostics help you see how the work items have been classified and routed after you've configured the rules.

You can view how the effort estimation model was used to route a work item.



Language support for effort estimation models

Effort estimate-based routing is supported only in the following languages:

- Arabic
- Danish
- Dutch
- English
- French
- German
- Italian
- Japanese
- Spanish

See also

Overview of unified routing
How to set up unified routing

Create and manage queues for cases

Article • 08/31/2023

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

In Dynamics 365 Customer Service, *queues* are containers used to store anything that needs to be completed or requires an action such as completing a task or closing a case. Queues help you to organize, prioritize, and monitor the progress of your work.

Queues can be useful in:

- Having a centralized list of pending work that needs attention.
- Sorting tasks by type, or by people assigned to complete them.

Types of queues

By default, a queue is created for each user and team in Customer Service. You can use this default queue to track all your work items, or you can set up queues to reflect your organization's structure, business processes, or both. For example, you can create separate queues for first tier and second tier product support teams that reflect their differing levels of expertise, or Gold and Silver queues to reflect differing priorities based on service contracts that customers have with your organization.

You can use queues to prioritize your activities and cases, and categorize them based on:

- products or services
- subscription levels (regular, premium customers)
- activity categories

- geography

You can create both basic and advanced queues (for unified routing). More information: Create and manage queues for unified routing

Based on who can view the queues, you can create:

- **Public queues** To let everyone in the organization view the queue and its work items
- **Private queues** To let a small group of members view the queue and its work items. Private queues display work items for members of that queue and help remove clutter from other users' views. Private queues don't restrict access to the records they contain. Therefore, to prevent unauthorized access to sensitive data, ensure that you set up security models based on your organization needs. More information: Dynamics 365 security model

> **Note**
>
> - You must manually add new team members as members of private queues.
> - You must manually add new Microsoft Entra ID team members to the team's default queue.

Prerequisites

Make sure that you have the Sales or Marketing Manager, Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

Check your security role

- Follow the steps in View your user profile.
- Don’t have the correct permissions? Contact your system administrator.

Create a queue

1. Go to one of the admin apps, and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Queues** in **Customer support**.

b. On the **Queues** page, select **Manage** for **Basic queues**.

2. To create a queue, select **New**. To edit a queue, select the queue in the list of queues, and then select **Edit** on the command bar.

3. Enter the following information in the **Summary** tab:

   - In the **SUMMARY** section, do the following:
     - **Name**: Enter the name of the queue.
     - **Type**: Select whether the queue is a private or public queue. If you're creating a private queue, you'll need to add members to this queue manually. In the **Members** section, select **Add** to add members to the queue. Only these members will be able to work on the items in this queue.
     - **Incoming Email**: Enter the email address that'll receive all messages sent to the queue.
     - **Description**: Enter a description.

   - In the **EMAIL SETTINGS** section, you can do the following:
     - Select a value in the **Convert Incoming Email To Activities** dropdown list to set the type of messages that you want to track as activities.
     - Set the email signature template. This signature is added to the email by default when you send messages from a queue or reply to messages sent to the queue. More information: Add a default signature for a queue

4. In the **Omnichannel** section of the **Conflicts Tab**, you can do the following:

   - Set **Automatic work distribution** to **No** (default option), and then select **Save** to create a basic queue.
   - Set **Automatic work distribution** to **Yes** to enable unified routing, and then select **Save** to create an advanced queue.

   > **ⓘ Important**
   >
   > You can update a basic queue to an advanced queue and enable it for unified routing by setting **Automatic work distribution** to **Yes**. However, once set, you can't revert the advanced queue to basic queue. You'll need to create a basic queue, and set the **Automatic work distribution** to **No**.

After you have saved the queue, the following changes happen in the SUMMARY tab:

- In the **Mailbox** field of the **EMAIL SETTINGS** section, a mailbox record for the queue is automatically created and selected. To update the mailbox, select the mailbox name More information: Create forward mailboxes or edit mailboxes

- If you selected the queue type as private, the **MEMBERS** section appears.
  - Select **Add Existing User**. Only those users that you add can work on the items in this queue. If you add a team as a member, only the existing team members can access the queue. New team members must be added manually to the queue to be able to access it.
  - The **QUEUE ITEMS** and **RECORD CREATION AND UPDATE RULES** sections appear.

Set up default views for routing dialogs

To optimize agent efficiency, you can set up custom views that contain a filtered list of queues. These queues are relevant to the type of cases that the agents handle. You can then set the view as the default from which agents can pick a queue or user to route the work items.

1. In the Customer Service admin center app, go to **Customer support** in the site map and select **Queues**.

2. On the page that appears, select **Manage** for **Routing dialogs**.

3. On the **Queues** > **Routing dialogs** page, do the following:

   - **Add to queues**: Set a default view that'll appear for the agents when they open the **Add to Queue** dialog to route a case from the case page.
   - **Route queue item**: Set a default view that'll appear for the agents when they open the **Route Queued Item** dialog to route a case on the **Queues** page,

4. Save and close.

At runtime, your agents will see the views that you have set for them.

For information on how to create custom views, see Create and edit public views.

View queue items for a queue

The **QUEUE ITEMS** section lists all activities that are either routed automatically by the routing rules or manually assigned to the queue.

Set up rules for creating or updating records automatically

In the **RECORD CREATION AND UPDATE RULES** section, you can create rules for automatically creating records for cases from incoming emails. More information: Automatically create or update records

Route items to basic queues

For all cases that are automatically created from incoming email and social posts, create routing rules to route the cases to queues. Then, assign the items in the queue to appropriate agents. More information: Create rules to automatically route cases

Alternatively, you can manually add cases and activities to queues. More information: Add a case to a queue

Assign items to agents

Queues share cases or activities as a group until they're removed from the queue or accepted by a customer service agent who assumes responsibility for handling them. Agents can pick the items for themselves, or a customer service manager can manually route these cases to the agents, or to other queues, users, and teams.

To assign items in the queue to agents, select **Assign** after selecting one or more items in the queues grid. In the **Assign Queue** box, you can choose to assign to other users or teams.

> **Note**
>
> - When two agents simultaneously add cases to the queue, the system creates two queue items instead of a single queue item.
> - If you've created workflows or used custom API to assign cases to agents and if the same case is assigned to two agents at the same time, then the system creates two queue items instead of a single queue item.
> - When an agent picks a case created by another agent and releases it from the queue, the case gets assigned to the queue owner and not to the agent who created the case.

Create a queue in legacy Service Management

To create or edit a queue

1. Make sure that you have the Sales or Marketing Manager, Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   ### Check your security role

   - Follow the steps in View your user profile.
   - Don’t have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Service Management**.
3. Select **Queues**.
4. To create a new queue, select **New**. To edit a queue, select the queue from the list of queues, and then select **Edit** on the command bar.
5. Enter the following information in the **Summary** tab.
   - In the **SUMMARY** section:
     - **Name**: Enter the name of the queue.
     - **Type**: Select whether the queue is a private or public queue. You can use a private queue to allow only a specific set of people to work on activities in this queue.
     - **Incoming Email**: Enter the email address that'll receive all messages sent to the queue.
   - In the **EMAIL SETTINGS** section:
     - **Convert Incoming Email To Activities**: From the dropdown list, select a value depending on the type of messages that you want to track as activities.
     - **Mailbox**: A mailbox record for the queue is automatically created and selected as soon as you save the queue record. To update the mailbox details, select the mailbox name. More information: Create forward mailboxes or edit mailboxes

- In the **Record creation and update rules** section, add a **Record Creation and Update Rule** record. By using these rules, you can automatically create or update system or custom records with incoming activities such as emails, social activities, or other custom activities. More information: Set up rules to automatically create or update records

> **Important**
>
> - This is a central place to manage rules across all supported activities including out-of-the-box and custom activities associated with the queue.
> - The **Record creation and update rules** section displays rules using the **Email Activity Conversation Setting** or **Social Activity Conversation Setting** and that have the same queue ID as the queue.
> - Multiple rules with the same source type and same queue can exist. So when you select **Email Activity Conversion Settings** or **Social Activity Conversion Settings**, the rule with the latest **Last Modified On** date is applied.

6. Select **Save**.

See also

Work with queues in Omnichannel for Customer Service
Add a case to a queue

Route cases using basic routing rulesets

Article • 03/20/2023

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

> **Note**
>
> We recommend that you enable and use unified routing for automatically routing records in Customer Service. More information: **Overview of unified routing**.

Use routing rules in Customer Service to route cases to the right agents at the right time without any manual intervention. You can also use routing rules to route cases that are escalated to specific queues.

Routing rules are solution-aware entities. You can export routing rules from one environment to another by using the solution import export tool. However, rules are mapped to a queue, user, or team that's not solution-aware data. Therefore, after exporting the data, you'll need to edit mappings of each rule item to correspond to the queue, user, or team in the target environment.

Add routing rulesets site map for custom apps

In custom apps, you might not have routing rulesets in your site map. To add routing rulesets to the site map, follow these steps:

1. Sign in to https://`<org>`.dynamics.com/apps, and go to App Designer.
2. Select the **More Options** ellipses (...) on your custom app, and then select **OPEN IN APP DESIGNER**. The **App Designer** page appears.
3. Select the pencil icon beside **Site Map**. The **Customer Service Hub** page appears.
4. Select the area in which you want to add the routing ruleset entity, such as **Service Management**, select **Add**, and then select **Subarea**. The **SUB AREA** section appears in the right pane.
5. On the **Properties** tab, in **General** section, do the following:

- **Type:** Select **Entity**.
- **Entity:** Select **Routing Rule Sets**.

6. Save and publish the site map.

   The site map is created with the routing ruleset. Go to your custom app to locate routing rulesets in the site map.

More information: Create a site map for an app using the site map designer

Create a routing ruleset

You can create routing rulesets in Customer Service to automatically route cases. This capability is also available in Dynamics 365 Customer Engagement (on-premises) 9.1. More information: New features in Dynamics 365 Customer Engagement (on-premises)

Prerequisites

Review the following prerequisites before creating a routing ruleset:

- Verify that you have the Customer Service Manager, System Administrator, System Customizer security role, or equivalent permissions.

  Check your security role

  - Follow the steps in View your user profile.
  - Don't have the correct permissions? Contact your system administrator.

Create routing rulesets to route cases

When creating routing rulesets, you can add multiple rule items and arrange them in the required order. The rule items are evaluated in the order of their definition. Rule items are evaluated from top to bottom. If a rule item is evaluated as true, the case gets routed to the destination agent and skips further evaluation. If a rule item is evaluated as false, further rule items are evaluated.

To create the routing ruleset

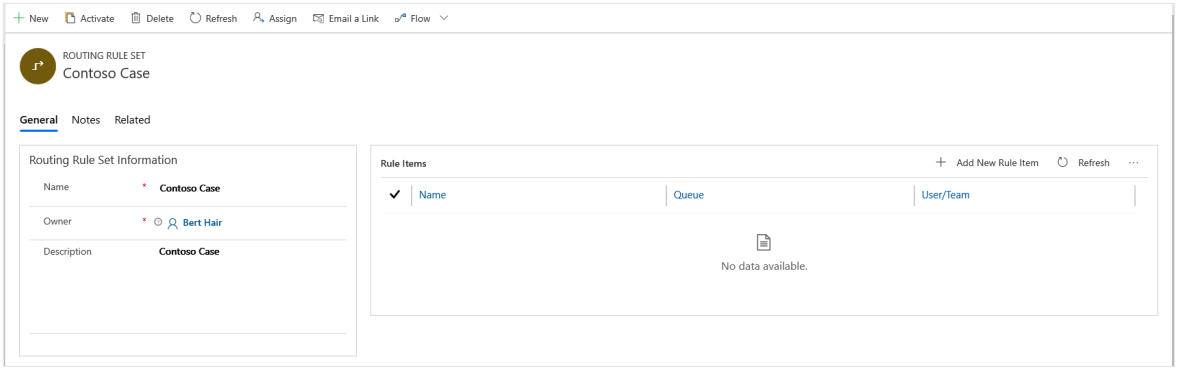
1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

a. In the site map, select **Routing**. The **Routing** page appears.

b. Select **Manage** for **Routing rule sets (basic)**.

2. Select **New** on the command bar.
3. On the **General** tab, in **Routing Rule Set Information**, Enter **Name** and **Description** for the routing ruleset.
4. Select **Save**. The routing ruleset is saved, and the **Rule Items** section is displayed.



5. In the **Rule Items** section, select **New Rule Item**. The **New Rule Item** dialog box appears in which you can specify conditions that will be evaluated for routing cases to a queue, an agent, or a team.

   a. On the **General** tab, in **Rule Item Information**, enter a **Name** and **Description**.

   b. In **Rule Criteria**, you can specify the conditions in one or a combination of the following to be evaluated for routing cases:

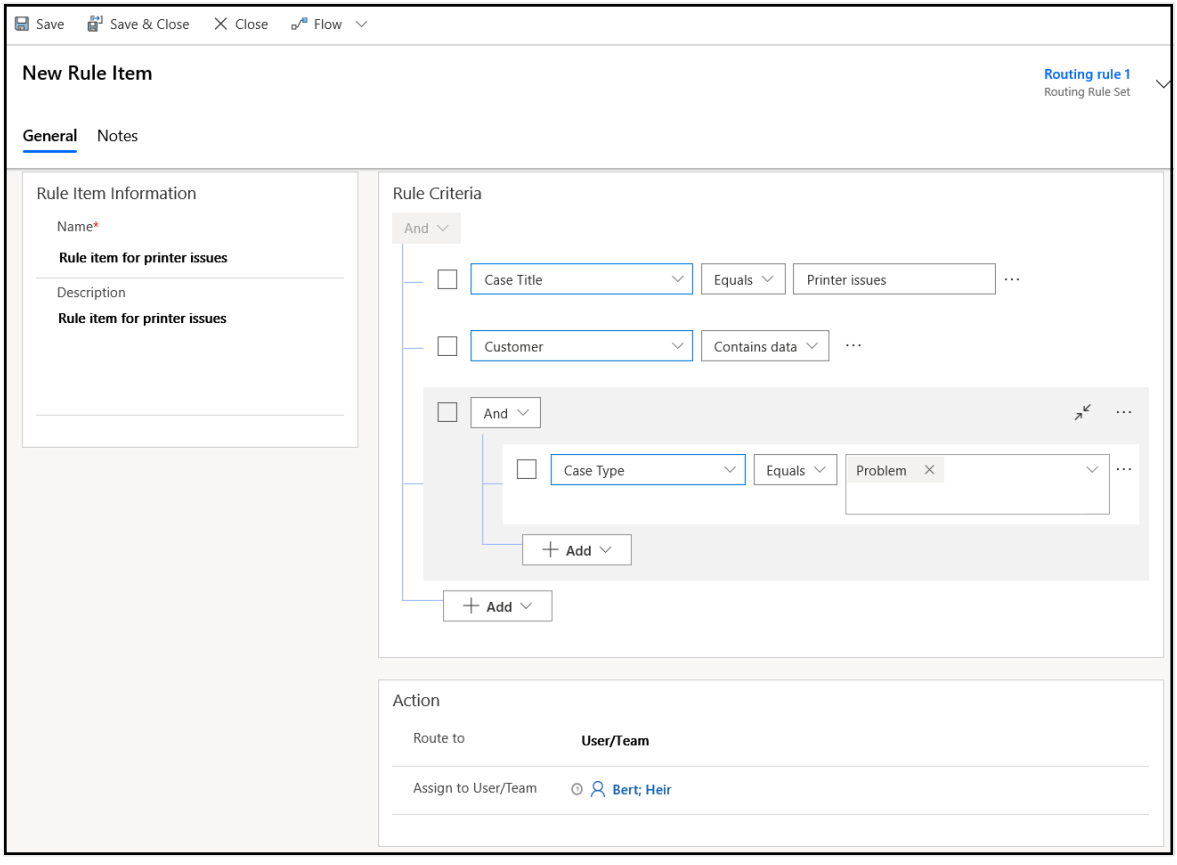
   - **Add Row:** Select ... to group multiple rows of conditions into one group.
   - **Add Group:** Select ... to ungroup a group of conditions.
   - **Add related entity:** Select to add a condition for a specific entity.

> ⓘ **Note**
>
> The following limitations are applicable when you define a rule criteria in apps based on Unified Interface:
> - You can't select a time value for the Date and Time data type. If you try to edit an existing rule item that was created in the web client, the time will be set to 00:00.
> - Only one level of the related entity hierarchy is supported though the application lets you select nested related entities.

- The related entity inside a group of the and/or clause is not supported.
- By design, the attribute with "Multi Select Option Set" data type is not supported.
- The "in" and "not in" operators for the Single Line of Text and Multiple Lines of Text data types and the "not-on" operator for the Date data type are not supported.
- For the lookups data type, only the "equal", "not equal", "null", and "not null" operators are supported.
- In the Add related entity list, the "One to Many" and "Many to Many" options are not supported even though the application lets you select them.
- If you use the same related entity more than once in the rule conditions, though the rule will be evaluated at runtime, you can't edit the rule in the app and an error message will be displayed.

c. In **Action** > **Route to**, select queue or user/team.

For example, all cases about printer issues from customers should be routed to an agent named Bert Heir, who is the subject matter expert in the team. The rule item for the condition can be configured as shown in the screenshot.



d. Select **Save & Close** to save and close the rule item.

6. In the **Routing Rule Set** record, select **Activate**. The ruleset is applied to cases that match the conditions in the rule.

> ⓘ Note
>
> - When unified routing is not enabled, only one routing ruleset can be active at a time. If you try to activate a rule when another rule is active, it will deactivate the currently active rule. You can activate or deactivate only the rules that you own.
> - If you want to edit an active routing ruleset, you must deactivate it. To successfully import a solution that includes an active routing ruleset into an organization where a rule exists with the same ID, deactivate the rule in the organization.

Create a routing ruleset (Customer Service app)

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   When you create and activate a routing ruleset, internally a corresponding workflow is also created. Whatever action you do on the routing ruleset, such as creating or assigning the rule, you must have privileges to perform the same action on workflows. For the rule to work, you must have sufficient privileges to run a workflow. The routine ruleset is applied in context of the privileges that the owner of the routing ruleset has.

Check your security role

- Follow the steps in View your user profile.
- Don’t have the correct permissions? Contact your system administrator.

2. go to **Settings** > **Service Management**

3. Select **Routing Rule Sets**.

4. To create a new routing ruleset, select **New**.

   -OR-

To edit a routing ruleset that you already have, in the list of records, select the rule that's in the Draft state, and then on the command bar, select **Edit**.

5. Fill in your information. Use the handy tooltips as a guide.

6. After you enter information in all the required fields, select **Save**.

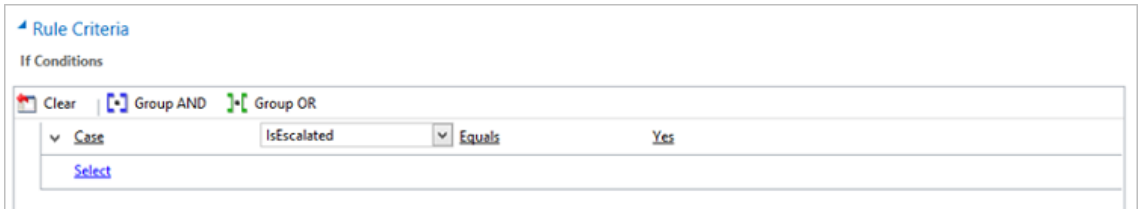
7. In the **Rule Items** section, select the **Add Rule Item** button + to specify conditions for routing cases to a queue.

   You can add multiple conditions here and arrange them in the desired order. The rule items are run in the same order. As soon as an applicable rule item (based on the If Conditions) is applied on the case, the other rule items are not run on the case.

   a. In the Rule Item form, type a descriptive name for the rule item.

   b. Under **Rule Criteria** in the **If Conditions** section, specify the conditions for which the case will be routed.

      For example, to route all cases that have the **IsEscalated** field set to **Yes** to the **Tier 2 support** queue, specify the conditions as shown here:

   c. Under **Then Conditions**, specify the queue to which the cases will be routed or the user or team to which the cases will be assigned if the conditions in the **If Conditions** section are met.

> **Tip**
>
> To group conditions in the criteria, use the **Group And** or **Group Or** options.

8. Select **Save and Close**.

9. In the routing ruleset record, select **Activate** so that the ruleset is applied to the cases matching the conditions in the rule.

Note

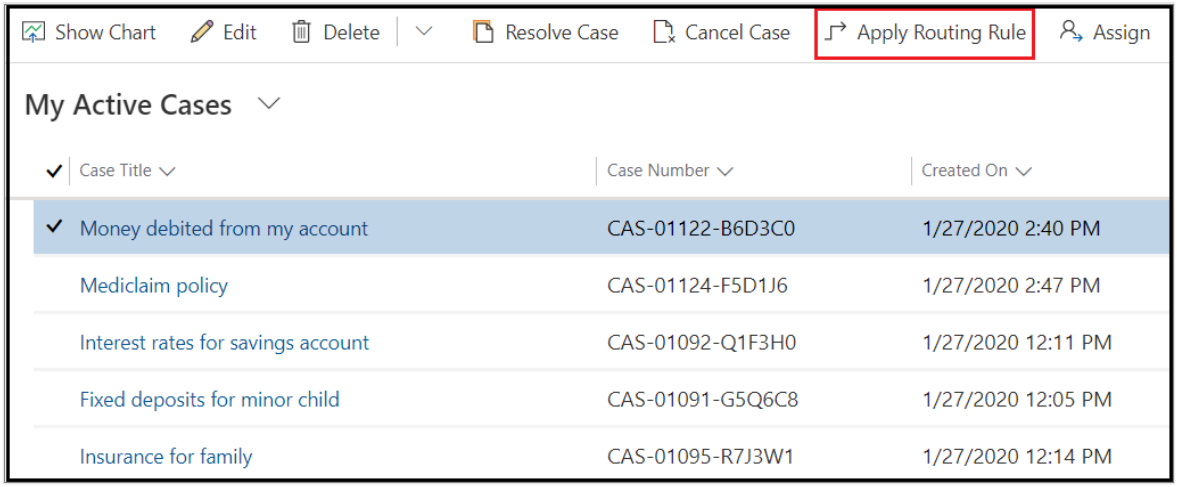
- Only one routing ruleset can be active at any point of time. If you try to activate another rule when one rule is already active, it will deactivate the currently active rule. You can activate or deactivate only the rules that you own.
- You can't edit an active routing ruleset. Therefore, if you're importing a solution that includes an active routing ruleset into an organization where the rule already exists with the same ID, the solution import will fail.

Apply a routing ruleset

You can apply the routing rule when creating a case using the **Save & Route** button. For more information, see Create a case.

Perform the following steps to manually apply the rule to any existing or manually created cases:

1. In the Customer Service Hub, go to the list of cases in the **My Active Cases** view.
2. Select the cases that you want to route using this rule, and on the command bar, select **Apply Routing Rule**.



Note

- If you're importing bulk records, and don't want the routing rules to be applied to the cases that you're importing, add a column **Route Case** to the spreadsheet used for importing the records, and add the value **No** for all the cases that you don't want to route.

- Cases can be created and routed programmatically. If you want to override this behavior, set the value for the RouteCase attribute to "No".

Recommendation to upgrade solution

Perform the following steps before you upgrade a solution:

1. Deactivate the routing rulesets which are brought through the previous version of the solution. The state of routing rulesets changes to draft.
2. Upgrade your solution as required.
3. After the successful upgrade of the solution, activate the routing rulesets as required.

See also

Create and manage queues

View diagnostics for unified routing

Article • 08/09/2023

Unified routing helps you assign a work item to the best suited agent or queue to handle it, based on the agent skills and the entities that are related to the work item. Routing diagnostics gives a granular view of each of the routed records to help you understand and diagnose issues that occur in the classification and assignment of work items.

The diagnostics data is stored in Microsoft Dataverse and this data can affect the storage capacity. The data for routed records might consume more space in comparison to other types of work items. More information: Manage routing diagnostics data

> **Important**
>
> Your supervisors can access the routing diagnostics for records and conversations that are handled through unified routing. However, if you don't want them to view or select the links on a diagnostic record or conversation, or view rules and other configurations, ensure that you assign read-only permissions on the roles such as the Omnichannel supervisor or any other custom roles that you use for managing access in your organization.

Manage routing diagnostics

To see data related to work items and their status, you need to enable routing diagnostics. The diagnostics setting can take up to 15 minutes to take effect after you enable it.

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Routing**. The **Routing** page appears.
   b. Select **Manage** for **Routing diagnostics**.

2. On the **Routing diagnostics** page, select **Turn on routing diagnostics**.

3. In the confirmation message that appears, select **Yes**.

You'll see that a list of new work items starts to appear. However, the work items may not appear on your screen immediately.

4. To disable diagnostics, select **Turn off diagnostics**.

Understand routing stages and diagnostics

A diagnostics work item is a log record containing the details of events that occur through the different routing stages for a work item before it's assigned to an agent. The **Routing diagnostics** page displays a list of work items with details and the stage each work item is in. A brief description of the attributes is as follows:

- **Work item**: The name of the work item. Work items can be searched and sorted by selecting the dropdown next to the work item column.
- **Routing status**: The stage the work item is in.
- **Routing started on**: The date and time when the routing began.
- **Routing duration**: The duration for which the work item has been in its current stage.
- **Work stream**: The name of the workstream that the work item was assigned to.
- **Queue**: The name of the queue that the work item was routed to.
- **Routed agent**: The agent to whom the work item was assigned.
- **Rule hit policy**: Depending on the stage, displays the rule information, such as first match or run all, that helps you understand how the rules were processed in the stage.

Routing diagnostics flow

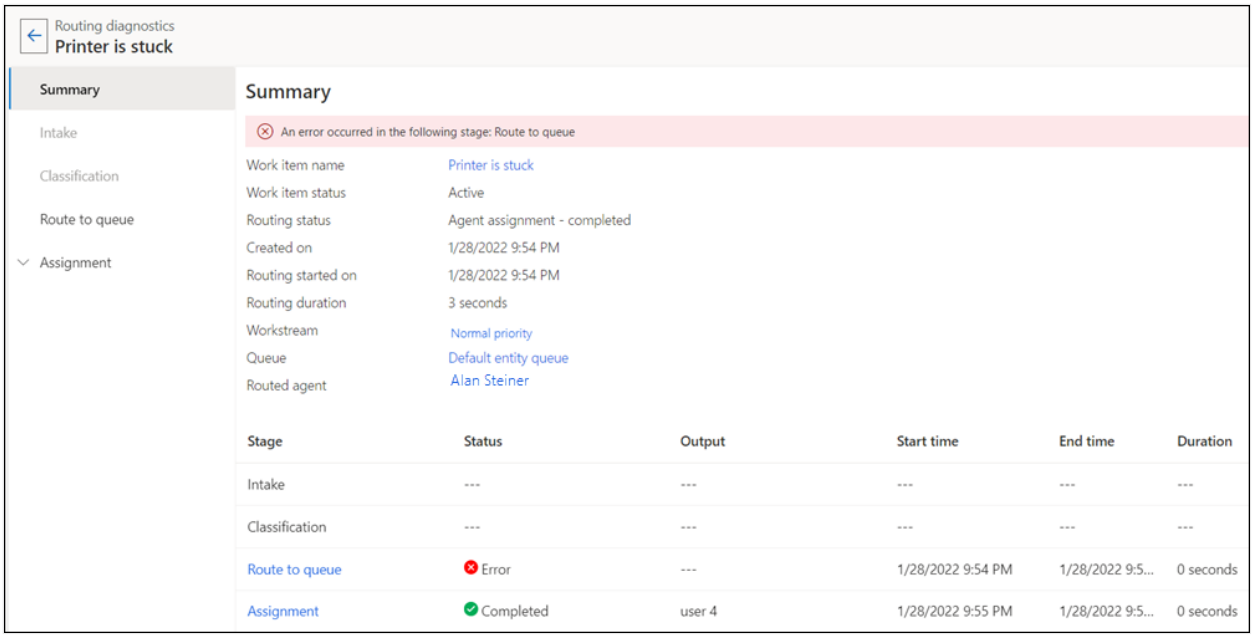
Each work item needs to pass through a set of stages before its routing stage can be assigned as completed. You can create multiple workstreams and assign work items based on their severity and priority. The diagnostics flow displays information based on the flow each work item goes through.

Intake ➞ Classification ➞ Route to queue ➞ Assignment

> ⓘ **Note**
>
> If a work item skips a stage in the flow, the stage is depicted as disabled.

Summary

You can select a work item on the **Routing diagnostics** page to view the detailed information, such as when the work item was created, its current stage, and the duration of each stage. You can also select and open the work item to see the associated case. If the work item isn't assigned or no rule item meets the criteria of the work item, error messages are displayed. You can select any of the stages to see further details and diagnose the issues.



Intake

> **Note**
>
> The intake stage is applicable for record routing only.

When a work item comes in, it goes to the first workstream in the Intake table, and is checked for whether it meets the conditions of the rule set. The work item moves to the second workstream and checks for a match with that rule set, and so on. When a work item matches the rule set, the work item is run. You can create multiple workstreams to handle work items based on their priority. This is called the **Intake** stage of the workflow.

After a work item passes the **Intake** stage, it's then classified through several rule sets and rule items.

A work item passes through three stages.

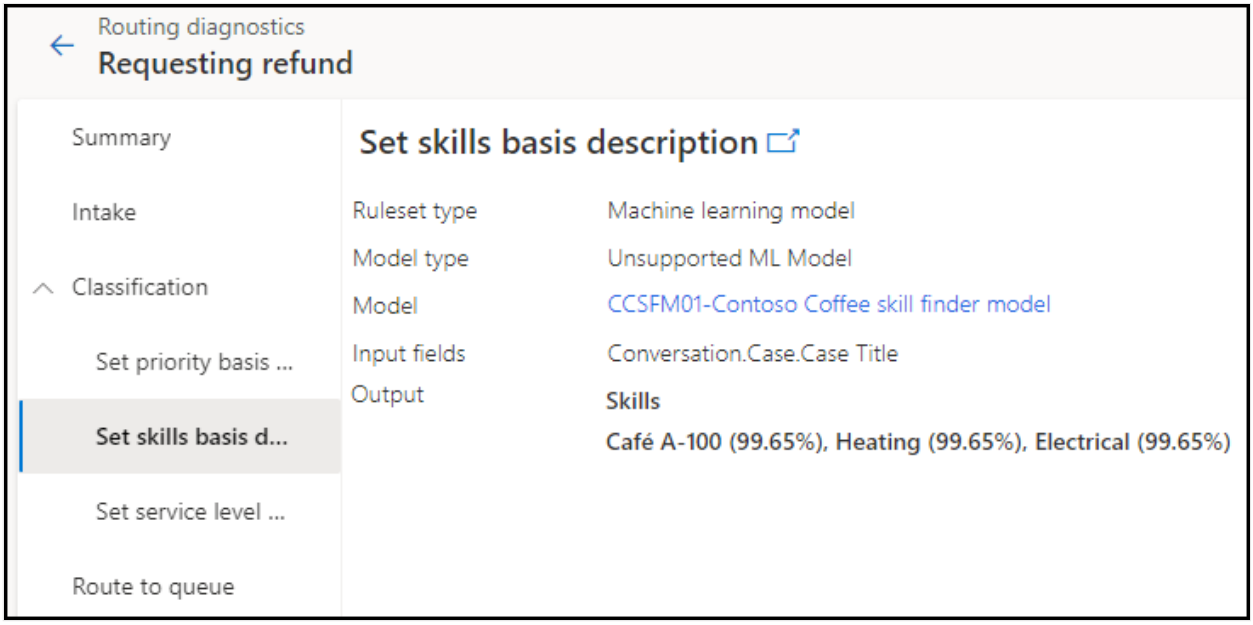
- **Processed** : Work item has passed through a rule set but didn't match with the rule set and is therefore not run.
- **Matched**: Applicable to route-to-queue rules only; displays with a green check mark if the rule condition is true.

- **Applied** : Work item has passed through a rule set and matched with the conditions of the rule set.
- **Not processed**: Work item didn't pass through a rule set.

Classification

If a work item doesn't run through a particular rule set in the **Classification rulesets** list, the **Run status** check mark is displayed in red. When the work item runs a particular rule set, the **Run status** check mark is displayed in green. A work item runs all rule sets, but it doesn't run all rule items within the rule set.

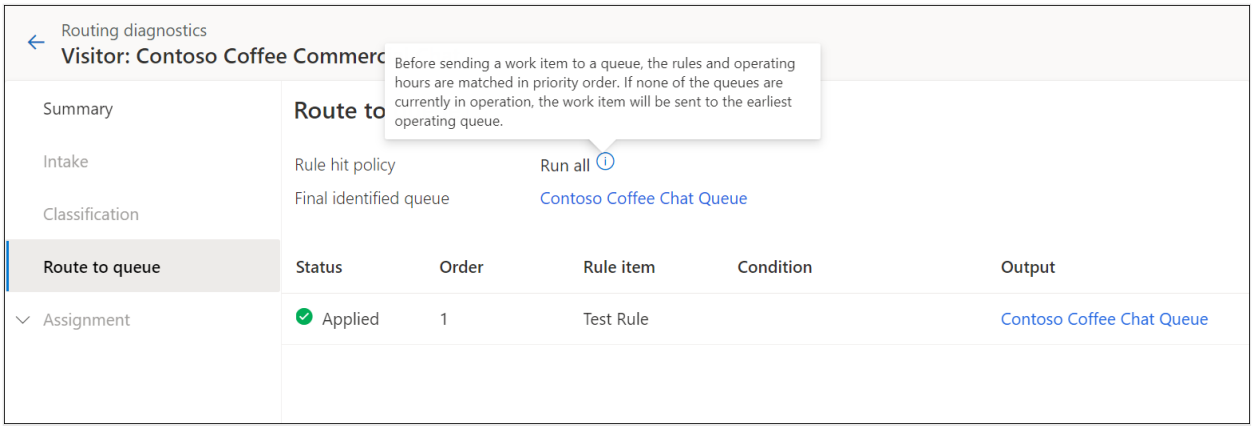
If machine learning-based skills identification, effort estimation (preview), or a sentiment prediction (preview) model is used, the details of the model that's used are displayed in the **Classification** section.



Route to queue

Queue routing rules are formulated to send the work item to the correct queue. More information: Configure route-to-queues rules

The queue name to which the work item is routed is displayed on the route to queue page.



If no queue matches the requirement, the work item is assigned to the default queue.

Assignment

Each work item is assigned to an agent or is sent to a queue based on the **Assignment** rule set. Assignment rule sets contain conditions for which work items need to be assigned to agents. In routing diagnostics, the assignment stage helps understand how the assignment of the work item was handled, such as how the prioritization was done and what assignment selection criteria was applied.

The following stages are available:

- **Prioritization**: Lists the prioritization rule that was applied if any. Work items are routed according to their priority. More information: Configure assignment methods and rules for queues
- **Assignment selection**: Displays information about the conditions that determined in selecting an agent. If more than one assignment rule set exists, selection criteria defines the order in which the rule sets are to be evaluated. The assignment selection criteria determines the rule set that has the closest match and the rule that should be run out of the many rules.
- **Assignment ruleset**: Displays information about the rule sets that were processed.
- **Agent assignment trace**: Provides details about the assignment criteria and assignment trace:
  - **Assignment criteria**:
    - **Preferred agent**: Displays whether the setting is enabled or disabled. (This feature is in preview.)
    - **Assignment method**: Displays "Highest", "Round robin", or "custom".
    - **Capacity**: Displays the capacity information.
    - **Presence**: Displays the presence used.
    - **Skills**: Displays the skills that were matched if any.

See also

Overview of skill based routing
Assignment methods for Queues
Create and manage routing rules
Routing and assignment rules
Historical analytics for unified routing in Customer Service
Historical analytics for unified routing in Omnichannel for Customer Service
Configure work classification rules
Configure routing to preferred agents

Manage routing diagnostics data

Article • 10/13/2023

The diagnostics data for unified routing is stored in Dataverse for Apps Database Capacity. We recommend that you periodically delete the routing diagnostics data to manage the storage capacity.

You can use the information in this section to define an effective strategy to manage your diagnostics data.

The following table lists the analysis of the average data consumption of some of our large customer organizations. The values are based on the assumption that each stage has one ruleset only.

Data consumption	Size/Record in kilobytes (average)	Description
Data consumed per ruleset within a diagnostic work item	13.27[1]	The average data that's consumed by a single ruleset in a routing stage for the diagnostics item generated for a routed work item.
Data consumed per diagnostics work item	53.08	The average data consumed by the diagnostics item that's generated for a routed work item.

[1] The average values can vary based on factors, like the number of rules, conditions defined within a ruleset, and size of the conditions (number of characters).

Let's take an example in which each routing stage has a single ruleset with a couple of rules and moderately complex rule conditions. If you route 500 work items per day, it generates 500 diagnostics work items that consume approximately 25.64 MB of data. For information about routing stages, see Understand routing stages.

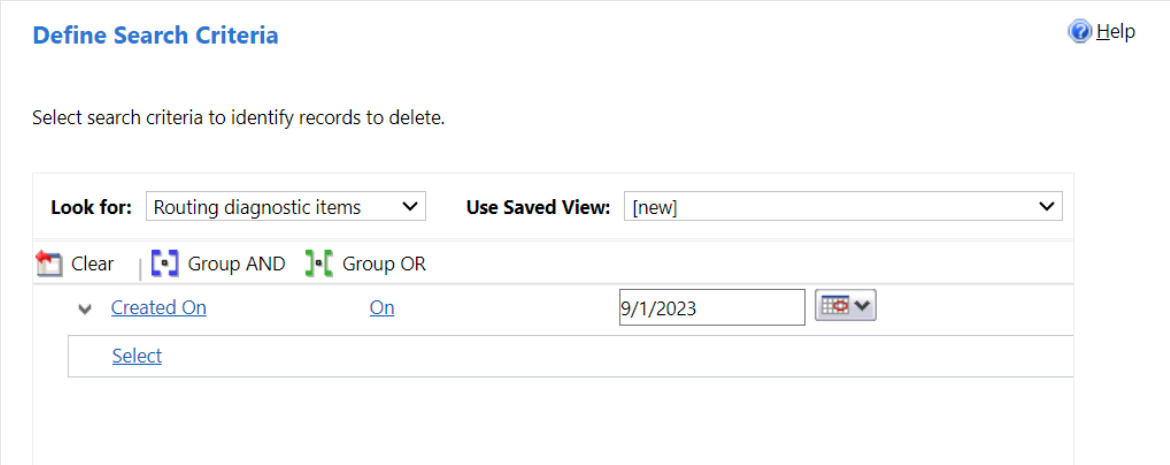
Delete routing diagnostics data

> **Note**
>
> We recommend that you do the following actions before you perform the delete operation:

- Verify and ensure that the data isn't required because delete operations are irreversible.
- Turn off the diagnostic feature.

1. Perform the steps in the Capacity page details article to view the storage consumption of the diagnostics records mentioned in step 2.

2. Perform the steps in the Use bulk deletion to remove large amounts of data article to delete the following routing diagnostics data in the specified order.
   a. Search for "Routing diagnostic items" for the msdyn_unifiedroutingdiagnostic entity. More information: msdyn_unifiedroutingdiagnostic



   a. Search for "Routing diagnostics" for the msdyn_unifiedroutingrun entity. More information: msdyn_unifiedroutingrun

Next steps

View diagnostics for routed records

Use best practices to set up unified routing in Customer Service

Article • 07/11/2023

This article discusses some of the important aspects to successfully deploy and manage unified routing and focuses on the most common areas where you might have questions.

Set up unified routing

Verify service limits and default quotas

Dynamics 365 Customer Service relies on shared cloud resources for data and processing. You must check the service limits and default quotas for the resources before you provision unified routing. If you need a higher limit on a measure that's indicated as adjustable, contact Microsoft Support to check whether the limit can be increased. More information: Service quotas

Manage users

Use the following guidance to set up users in bulk:

- Follow a specific sequence to set up users in bulk using Dataverse API calls.
- Limit the number of change requests when setting up users in bulk using Dataverse API calls.

Follow a specific sequence to set up users in bulk using Dataverse API calls

To manage the users in bulk, follow these steps:

1. Create or import users to enable them.
2. Add the users to queues. More information: Create and manage queues
3. Create bookable resources. More information: Manage users
4. Add skills. More information: Set up skills
5. Assign capacity profiles. More information: Create and manage capacity profiles
6. Assign required roles. More information: Assign roles

If you don't follow the recommended order, inconsistencies in the user information might occur, such as missing users or missing skills and capacity profiles.

Limit number of change requests when setting up users in bulk using Dataverse API calls

Customer Service lets you make API calls to set up users in bulk. A single change request is any add or update operation like defining a single skill, capacity profile, or role per user.

We recommend that you make 500 change requests every 15 minutes for the system to process the changes optimally without getting throttled. Beyond this recommended rate for bulk updates, you might see inconsistencies in user data, such as skills not updated as expected, after the update is over.

For example, let's say you manage a contact center that has 1,000 agents working in it and need to set up each agent by assigning two skills, one capacity profile, and one role. The total number of requests to configure these settings is 4,000.

Based on our recommendation of 500 requests per 15 minutes, you'll need to make these requests in eight batches as follows:

Change request type	Number of requests	Number of batches
Two skills per agent	250 requests per batch	Four
One capacity profile per agent	500 requests per batch	Two
One role per agent	500 requests per batch	Two

For information on using the API, see Use the Microsoft Dataverse Web API.

Monitor agent capacity

You can view details such as the agent's presence, current conversations, and the sentiments of those conversations, and an agent's available capacity across different capacity profiles. You can use the **Agents insights** report to monitor the agent capacity. You can also create a custom report per your business requirements to monitor the agent capacity using the following entities:

- The agent status entity for the latest capacity profile and presence status of an agent.

- The status history entity for the history or audit trail of the presence and capacity profile changes for an agent.

Manage queues

- Manage automatic assignment if the top 100 work items have extended wait times.
- Use skill-based routing to distribute work items to the most qualified agents.
- Set up single or multiple queues with skill-matching to manage different types of work.

Manage auto-assignment if top 100 work items have extended wait times

The auto-assignment process in unified routing matches incoming work items with the best-suited agents based on the configured assignment rules. This continuous process is made up of multiple assignment cycles. For information about the auto-assignment process, see How auto assignment works.

If you have a scenario in which agents aren't available to be assigned the top 100 work items for an extended time, we recommend the following options:

- To minimize the wait time, use features like overflow management to manage high load or custom assignment rules to gradually relax rules to expand the eligible agent pool.
- Review agent availability and schedules to evaluate staffing more agents.
- If there are items lower in priority that might have eligible agents, then contact Microsoft Support with your business scenario to determine if the block size can be increased.

> **Note**
>
> A block size that's larger than the default one might affect performance and accuracy of prioritization. Therefore, we recommend that you share your business scenario with the queue backlog and queue staffing projections to help Microsoft Support recommend the most optimized block size for your use case.

Use skill-based routing to distribute work items to the most qualified agents

Skill-based routing lets your contact center distribute work items (conversations) to the agent who is most qualified to solve the issue. However, the need to use skill-based routing is determined by your business scenario.

For example, to address the following scenario in your contact center, we recommend that you configure skill-based matching to assign work items to the agent who has the necessary skills to handle the cases:

- My service team supports two types of work items—order delivery issues and refund requests. However, most of the users will have the skills for one type only.
- During standard operations, the team will have two subgroups, and each group will handle one type of incoming work items.
- During peak load, certain users can handle work items from both types.

Skill-based routing helps reduce the number of queues to be managed in your organization.

Next steps

Overview of unified routing
FAQ about unified routing

See also

Provision unified routing
Set up skill-based routing

Supervisor view of historical analytics for unified routing

Article • 11/02/2021

Introduction

Historical analytics for unified routing helps supervisors, customer service managers, administrators with insights into the effectiveness of the routing configurations. Using these analytics, they can optimize their routing strategy to improve their customer satisfaction and workforce efficiency.

The historical analytics reports must be enabled and provisioned for you to be able to view the metrics.

View the historical analytics reports for unified routing

For the records that are routed using unified routing, the CSR Manager can view the historical analytics in Customer Service Hub and Customer Service workspace. Similarly, the Omnichannel supervisor can view the conversations-specific report in Customer Service workspace and Omnichannel for customer service.

In these reports, you can view the performance of the routed items and queues. By looking at the metrics, you can determine why a particular work item has landed in a queue, why an agent got one service request over the other, and why one of the queues has unwarranted load, while other is starved. You can then check the diagnostics reports for the corresponding work items, such as cases and conversations, to view and understand how they have been routed. Routing diagnostics provide information on the classification and assignment rules that were used to classify and assign the work items.

See also

Historical analytics for unified routing in Customer Service
Historical analytics for unified routing in Omnichannel for Customer Service
Diagnostics for unified routing

Access diagnostics for unified routing

Article • 10/07/2021

Introduction

Supervisors can access the routing diagnostics for records and conversations that are handled through unified routing.

Prerequisites

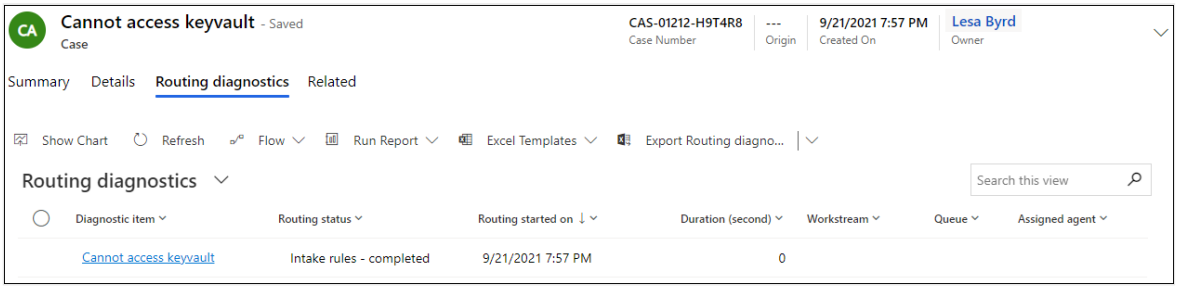
To access the diagnostics for records, such as cases, you must have the CSR Manager role. To access the diagnostics for conversations, you must have the Omnichannel supervisor role.

Access diagnostics for work items handled through unified routing

As a supervisor, you can access and view diagnostic reports of work items that have been routed through unified routing.

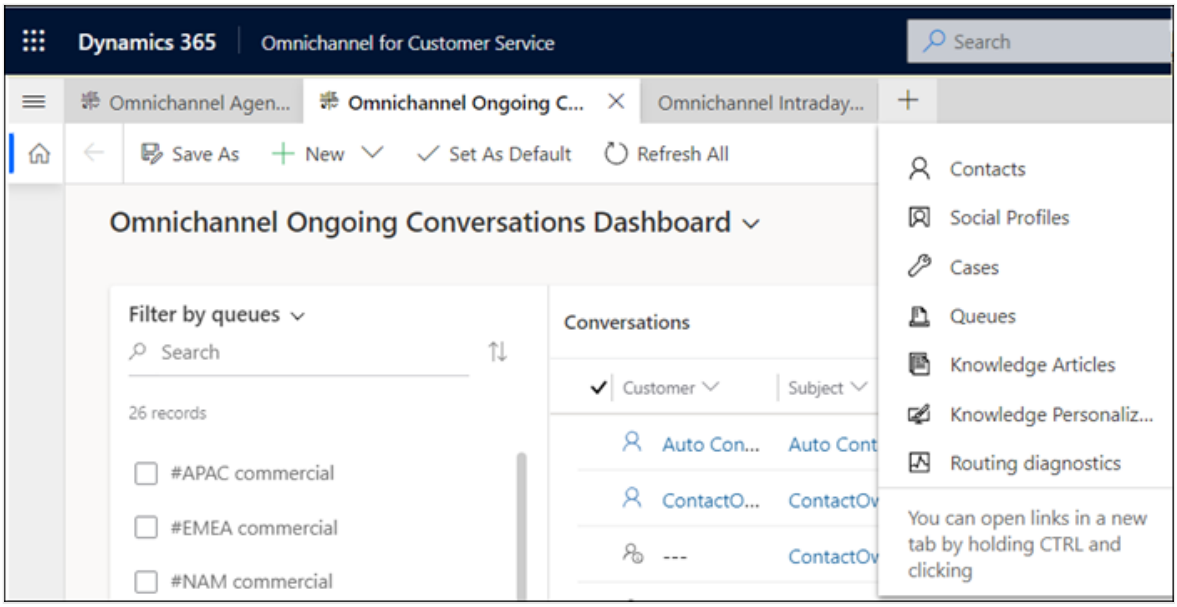
To view the diagnostics reports in Customer Service workspace

1. For a record such as case, in Customer Service workspace, go to the case details page.
2. On the page that appears, select **Related**, and then select **Routing diagnostics**. The diagnostics information for the case is displayed on the **Routing diagnostics** tab.



To view the diagnostics reports in Omnichannel for Customer Service app

1. For conversations, in the Omnichannel for Customer Service app, select the plus (+) icon, and then select **Routing diagnostics**.



2. On the **Routing diagnostics** page, select the item for which you want to view the report.

See also

Diagnostics for unified routing
Overview of unified routing

Route records manually using unified routing

Article • 07/24/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Route records using Save & Route or Apply Routing Rule options

After you set up and enable a record for routing, you can start routing a record manually, either by:

- Selecting a record on the home page grid and then selecting **Apply Routing Rule** on the toolbar.
- Opening a record form and then selecting **Save & Route** on the form command bar.

> **Note**
>
> The **Apply Routing Rule** button doesn't display on the home page grid of Activities.

To manually route records:

1. Sign in to your model-driven app.
2. Select the record you want to route on the home page grid and then select **Apply Routing Rule**. Alternatively, open the record form and select **Save & Route** on the form command bar.

   The **Route Case** dialog box appears.
3. Select **Route**. The record is routed based on the record routing configuration.

If unified routing is enabled, on the **Customer Service Agent Dashboard** page, you must use the system view **Cases Available to Work On** to pick cases to work on.

See also

Overview of routing
Set up routing for records
Automatically route records using custom flow
Sample code to trigger routing for non-case records

Work with queues

Article • 03/17/2023

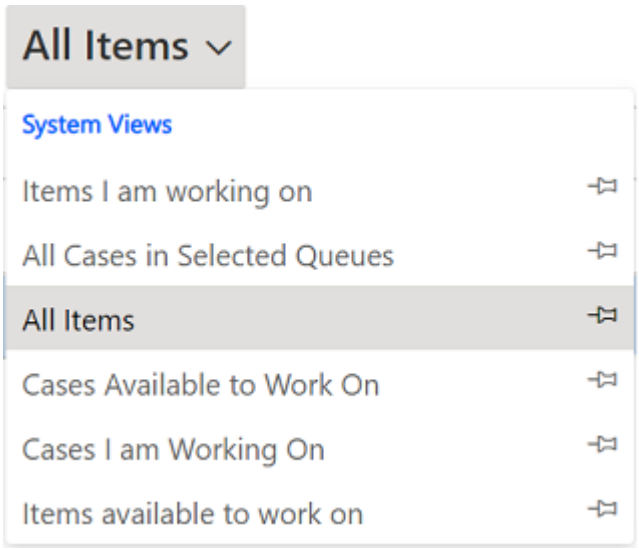
Use queues to organize, prioritize, and monitor the progress of your work. In Dynamics 365 Customer Service, queues are containers used to store anything that needs to be completed or requires an action, such as completing a task or closing a case. To know more about creating and managing queues, see Create and manage queues.

The option for agents to manage their queues and items is also available in Dynamics 365 Customer Engagement (on-premises) 9.1. More information: New features in Dynamics 365 Customer Engagement (on-premises)

Find the queue item

Use the view list and queue list to filter and find items in queues.

1. Go to **Service** > **Queues**.
2. Select a view, and then select a filter to see the items you want.



3. From the **All items** dropdown list, select the pin icon to pin the view that you want to appear on your dashboard.

Find all items in queues

1. To see all cases from a selected queue, in the view list, select **All Items in Selected Queues**.

2. In the queue list, choose one of the following options to filter cases based on queues:

    - <Individual queues>
    - All Queues
    - All Public Queues
    - Queues I'm a member of

Find cases that are available to work on

1. To see cases that no one else is working on, in the view list, select **Cases Available to Work On**.

2. In the queue list, choose one of the following options to filter cases based on queues:

    - <Individual queues>
    - All Queues
    - All Public Queues
    - Queues I'm a member of

Find cases that you're working on

1. To see only the cases that you're currently working on, in the view list, select **Cases I'm Working On**.

2. In the queue list, choose one of the following options to filter cases based on queues:

    - <Individual queues>
    - All Queues
    - All Public Queues
    - Queues I'm a member of

Find items available to work on

1. To see only items (activities and cases) that no one else is working on, in the view list, select **Items available to work on**.

2. In the queue list, choose one of the following options to filter cases based on queues:

- <Individual queues>
- All Queues
- All Public Queues
- Queues I'm a member of

Find items that you are working on

1. To see only items that you're currently working on, in the view list, select **Items I am working on**.

2. In the queue list, choose one of the following options to filter cases based on queues:

    - <Individual queues>
    - All Queues
    - All Public Queues
    - Queues I'm a member of

Pick an item to work on

1. Select **Service**.

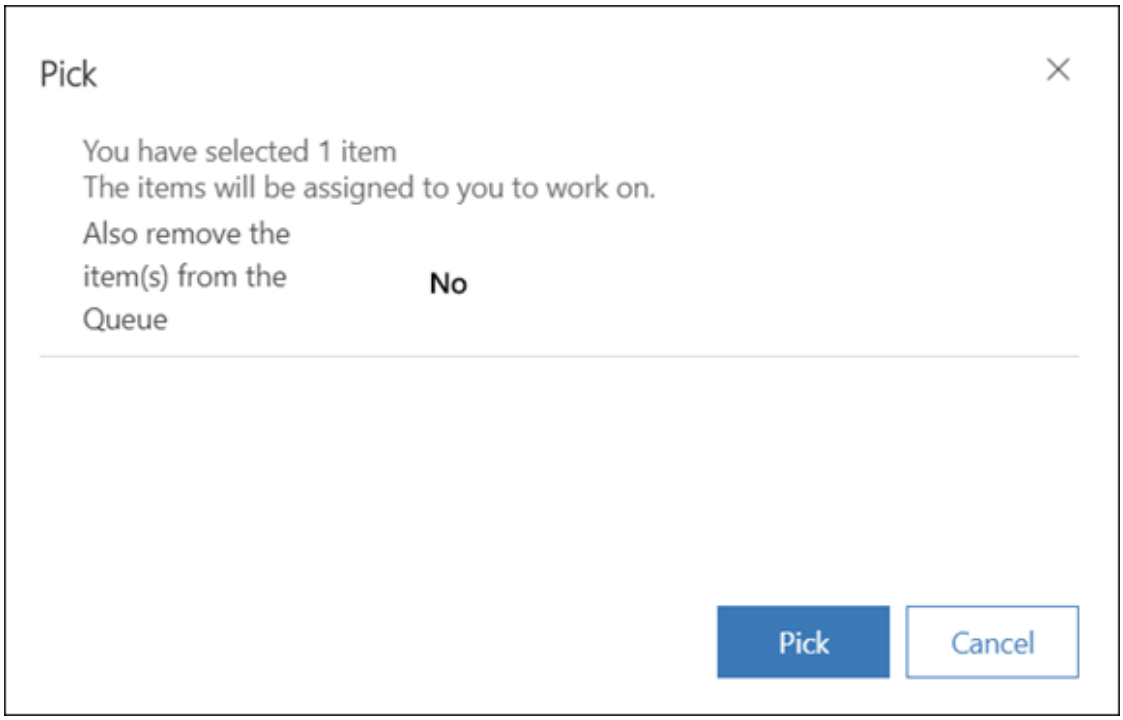
2. Select **Queues**.

3. Select a view from the System Views menu.

4. Select the queues from the menu.

5. Select the checkbox next to the item title to select the item.

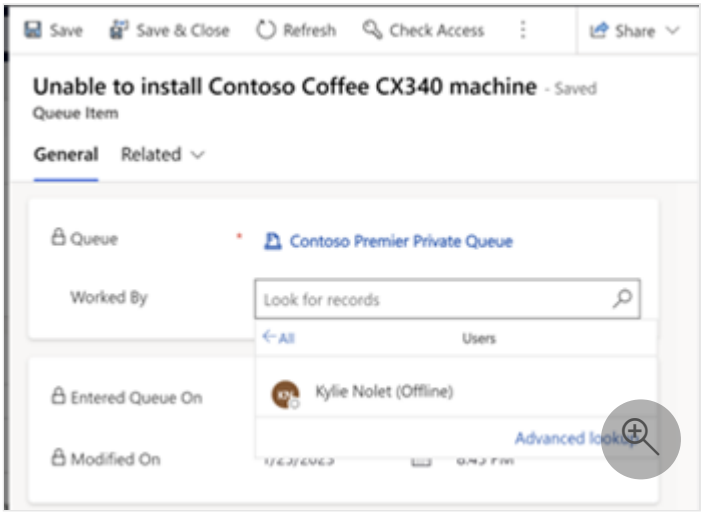
6. Select **Pick** from the command menu. The **Pick** dialog appears.



7. Optionally, select **No** to change it to **Yes** if you want item from the queue.

8. Select **Pick**. The item is assigned to you and removed from the queue if you had selected **Yes** in the previous step. Also, the following updates will happen if the item is in an advanced queue and is tracked through unified routing:

    - The **Worked By** attribute of the queue item will be updated with your user ID. The unified routing system takes this as an indicator of work assignment. To manually add another user or team, select the lookup for the **Worked By** field from **Queue Item details** and then select the user. If the queue item is assigned to a private queue, the lookup displays only the members of that queue.



    - Your capacity will be updated. If the work item indicated capacity consumed in units, the corresponding units will be reduced from your total available

capacity. If capacity profile is configured for the work item, the available units of capacity in that profile for you will be deducted by one.

- Your work schedule, assignment rules, skills, presence, or capacity constraints won't be evaluated during a manual pick. For example, even if you don't have enough capacity available as requested by the work item, you'll still be able to pick the work item and start working on it. This ability to manually override pre-configured capacity is to ensure that you're able to pick up work beyond your normal capacity during contingencies. More information: Capacity profiles

- Your presence will be updated. If you have further capacity left, your presence will be set to "Busy". If you have no capacity left, your presence will be set to "Do not disturb".

> **Note**
>
> Remove the items from the queue can't be set for work items in an advanced queue.

Release an item or case that you're working on

1. In the **View** list, select one of the views that show the items or cases that you're working on.

2. Select the case or item that you want to release, and on the command bar select **Release**.

   When you release an item, your name is removed from the **Worked By** field, and the item is no longer assigned to you; it's assigned to the queue owner.

Route an activity or case to another queue or assign to a different user or team

1. Select the case that you want to move to another queue, and on the command bar, select **Route**.

2. To move an activity or case to a different queue, select **Route**, and select a queue.

   -OR-

To assign the activity or case to another user or team to work on, select **User/Team**, and select the user or team. When you assign the activity or case to someone else to work on, the **Worked By** field is set to that user or team. You also have the option to remove the item from the queue.

After the item is released, the following updates will happen if the item is in an advanced queue and is tracked through unified routing:

- Your capacity will be updated based on whether capacity profile or capacity units have been configured.
- Your presence will be updated to "Busy" or "Available" based on your available capacity.

Remove a record from a queue

1. In the **View** list, select one of the views that show the items you want to remove.
2. Select the activity or case, and on the command bar, select **Remove**.

Assign an activity to a user or queue

If you want another person in your organization to work on an activity, you can assign the activity to that person or move it to another queue.

Assign to another user or team

1. Go to **Activities**.
2. Select the activity you want, and on the command bar, select **More Commands** •••, and then select **Assign**.
3. In the **Assign to another user or team** field, select **Lookup**, and select the user or team you want to assign the activity to.

   If you don’t see the user or team you're looking for, select **Lookup**, and then select **Look Up More Records**. From the **Look for** dropdown list, select **User** or **Team**. In the **Search** box, type the name, select the search button, select the name, and then select **Add**.
4. Select **Assign**.

Add to a queue

1. Go to **Activities**.
2. Select the activity you want, and then select **Add to Queue**.
3. The **Queue** field displays the queue the activity belongs to. The queue lookup displays only the queues that the activity can be added to.
4. Select the queue you want to route the activity to, and then select **Add**.

Pick a view for your queues

1. Go to **Activities**.
2. Select the activity you want, and then select **Add to Queue**.
3. In the **Queue** field, select **Search**, and then select **Advanced lookup**.
4. On the **Choose queue** dialog, select the **Business Queues(default)** dropdown menu to see the complete list of queues views available to you.

The table lists the views with their descriptions.

View	Description
Queues Lookup View, All Queues	Lists all queues.
Business Queues	Default view. Lists all the queues that aren't marked as default queues by users or teams.
Private Queues Lookup View, Local User Queues	Lists all the private and active queues.
Entity Queues	Lists all active queues that are created for records, such as case or email.
My Active Queues	Lists active queues owned by the currently signed-in user.
Omnichannel queues	Lists the active queues pertaining to Omnichannel for Customer Service or unified routing.
Omnichannel queues for Entity	Lists the active queues pertaining to Omnichannel for Customer Service or unified routing and are created for records, such as case or email.
Omnichannel queues for messaging	Lists the active queues pertaining to Omnichannel for Customer Service or unified routing and are created for messaging (chat).
Active Queues	Lists the queues that are in the active state.

View	Description
Inactive Queues	Lists the queues that are in the inactive state.
Queues: Primary Email (Pending Approval)	Lists the queues for which the primary email address is in pending approval state.

You can also select a view for your queues by navigating through Queues. You must select an item and then select **Route** to add the required view for your queues.

See also

Work with cases

Case queues and routing

Article • 04/05/2023

Customer Service allows you to add a case to a queue, save case records, and route them to a queue.

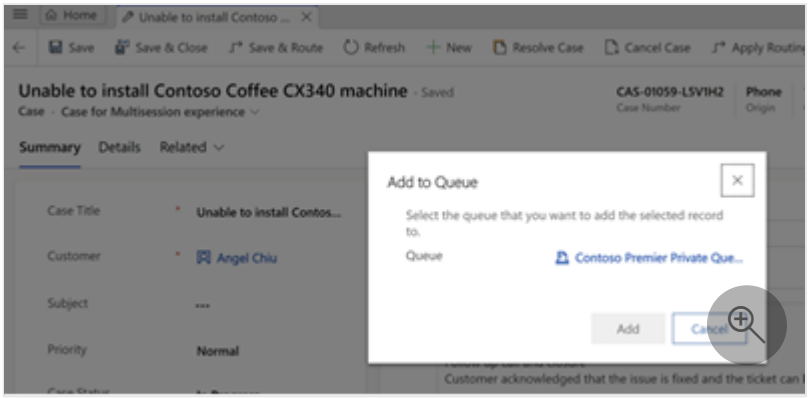
Add a case to a queue

If you think another group in your team has expertise on the subject, you can move the case to a queue so that someone else can pick it up.

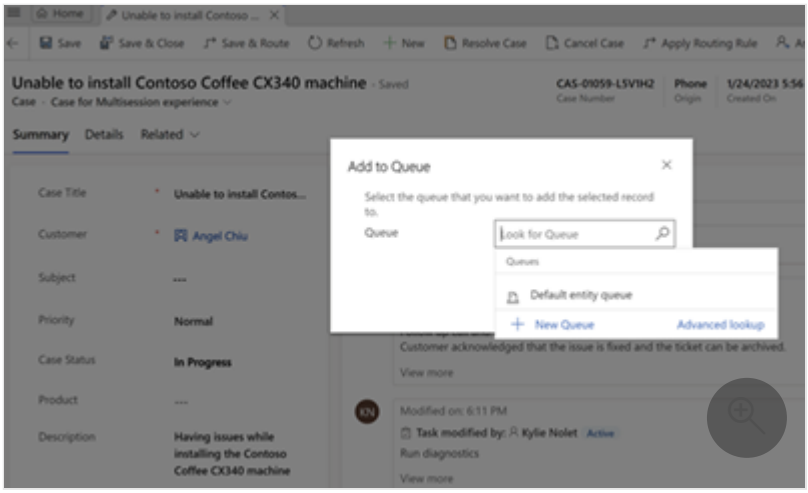
To add a case to a queue, perform the following steps:

1. Go to **Service** > **Cases**.
2. In the list of cases, select the case that you want to add to a queue.
3. On the command bar, select **Add to Queue**.
4. In the **Queue** field, select the queue that you want to add the case to, and then select **Add**.

   If a case is already added to a queue, the **Queue** field displays the current queue by default.

   The lookup for the **Queue** field displays only the queues that are configured for a specific entity. Voice and messaging queues aren't displayed in the lookup results since cases can't be added to those queues.



5. Select the queue you want to add the case to, and then select **Add**.

To know more about queues, see Work with queues.

Save and route a case

To save a case record and route it to a queue in a single action, use the **Save & Route** option.

1. From the list of cases, open a case record.
2. Make any changes, and on the command bar, select **Save & Route**.
3. In the **Route Case** dialog, select **Route**.

   The case will be routed based on the active routing rule set.

> **Important**
>
> The **Save & Route** button is available only on active cases.

See also

Learn the basics of the Customer Service Hub
Use the Main form and its components

Manage skills

Article • 03/08/2023

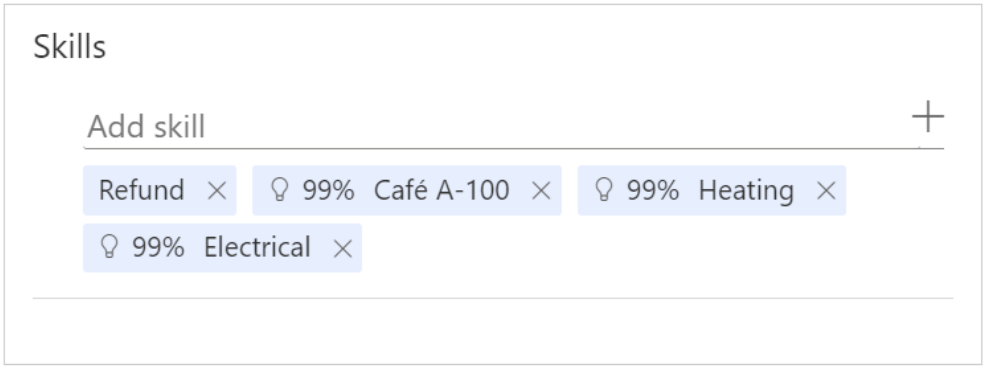
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Dynamics 365 comes with an out-of-the box skill control for messaging channels. When added to the case or conversation forms, the skill control enables you to view and update skills. Your administrator can enable the setting that allows you to update skills at runtime.

> **Note**
>
> For the record type entity, you'll need to customize the case form to add the skill control. More information: **Add a skill control for routed records**

When you receive a work item in your queue, you can view the skills required to do the work in the **Skills** field of your case or conversation record. For each work item, you can view skills that have been attached by the manual skill classification rules and those that were identified by the machine-learning skill finder models.

In the following screenshot, **Refund** is a skill attached by the manual skill classification rules, whereas skills with percentage rating such as **99% Heating** and **99% Electrical** are those that have been identified by the machine-learning model.



> **Note**

If you aren't able to view the skill control on the case or conversation forms, try clearing your browser cache.

Add and remove skills

If upon assessing the work item, you think that the relevant skills are missing or incorrect, you can choose to update the skills.

To add skills, select the **Add skill** field and enter a skill name. As you enter one or more letters, a list of skill names are suggested in the dropdown list; select the relevant skill from the dropdown list. Add as many skills as you think are appropriate for the work item.

To remove skills, select **X** next to each skill that you want to delete.

The skill updates you make for your assigned work items can then be used to retrain the machine learning-based skill finder models and help with accurate work assignments. More information: Retrain skill finder model

See also

Allow agents to update skills
Set up record routing
Set up unified routing

Understand how unified routing affects queue items and live work items for routed records

Article • 05/26/2023

Whenever you route a record using unified routing, a live work item entity record (msdyn_ocliveworkitem) is created to track the workstream settings for allowed presence, matched skills, and available capacity. The unified routing engine uses these settings to route records to the appropriate queues based on route-to-queue rules, and to the available agent based on presence, skills, and capacity.

After the record is routed to the queue, a queue item (queueitem) is created. The following three fields are updated in the queue item:

- the queue to which the queue item belongs
- the worker ID or agent assigned to the queue items
- the state of the queue item, whether active or inactive

Unified routing updates the following details when a record is automatically assigned to an agent or is picked by the agent:

- Agent as the record owner
- Agent in the live work item
- Worker ID in the queue item

Unified routing automatically synchronizes these updates from the queue item to the live work item, but not vice-versa. So, any updates from the live work item aren't automatically reflected in the queue item. If you'd like to make these updates manually, we recommend that you update only the queue item so that the live work item gets updated automatically by the unified routing engine.

You can update only one field of the queue item at a time. For example, if you need to update both the queue and the worker ID fields of the queue item, then ensure that you either update the queue or the worker ID field at a time, but not both.

> **Note**
>
> - Unified routing automatically sets the record's owner to a user. We recommend that you don't overwrite or update the ownership.

- We recommend that you don't add any custom logic on live work items as Microsoft uses them in unified routing services.

How unified routing affects queue items, live work items for routed records

This section describes how queue items and live work items are updated when you change the status of a queue item with unified routing.

What happens when you change the Queue field

- When you change the **Queue** field from an advanced queue to another advanced queue—by selecting **Add to Queue** on the record (via the AddToQueue action) or by selecting **Route To** on the queue item (via the RouteTo action), then the associated queue for the live work item (msdyn_ocliveworkitem) also gets updated to the same destination queue. This action then updates the unified routing services that maintain agent presence and capacity with the corresponding changes.

- When you change the **Queue** field from an advanced queue to a basic queue by selecting **Add to Queue** on the record (via the AddToQueue Action) or by selecting **Route To** on the queue item (via the RouteTo action), then the associated live work item (msdyn_ocliveworkitem) and the entity record are closed, and the queue item is no longer considered or picked by the unified routing engine. This action then updates the unified routing services that maintain agent presence and capacity with the corresponding changes.

- When you change the **Queue** field of a queue item from a basic queue to an advanced queue, then you must reroute the queue items using **Save & Route** so that the corresponding live work item can be picked up by the unified routing services. If you change a basic queue to an advanced type of queue while the queue item is still assigned to the basic queue, then the queue item won't be considered for routing by the unified routing engine.

What happens when you update the Worked By field

- When you update the **Worked By** field of queue items by selecting **Route To** on the queue items list (via the RouteTo action) or by manually updating the **Worked**

By field on the QueueItem details form, then the live work item (msdyn_ocliveworkitem) also gets assigned to the same agent.

- When automatic assignment routes the record and the record is assigned to the agent, then the **Worked By** field is set to the agent that's assigned in the queue item, the agent field in the live work item, and the owner field in the record.

> **⊗ Caution**
>
> If you run a custom script, flow, or action that updates the queue item, live work item, or record at the same time as the automatic assignment, then you might experience assignment errors. We recommend that you run any custom scripts or flows before or after the automatic assignment.

What happens when you delete or deactivate a queue item

- When you delete a queue item by selecting **Remove** (via the RemoveFromQueue action), or by deleting or closing the underlying record, the associated live work item (msdyn_ocliveworkitem) is also closed. This action then updates the unified routing services that maintain agent presence and capacity with the corresponding changes.

- When you deactivate a queue item, the associated live work item (msdyn_ocliveworkitem) is also closed. This action then updates the unified routing services that maintain agent presence and capacity with the corresponding changes. If the record needs to be reopened, then you must reroute it using **Save & Route**, and not reactivate the queue item. The rerouting creates a new live work item and a new queue item, ensuring all the information needed for routing is available again.

- When you update a queue item using unified routing, you can't remove it from the queue by selecting **Pick** (PickFromQueue action) or **RouteTo action** on the queue item.

- When you resolve a case, the corresponding queue item that gets deactivated can't be activated again.

> **ⓘ Note**

- Unified routing works upon the underlying entity record for the owner field also. Therefore, ensure that you provide Read privileges to the agents for that entity and any other dependent entity. For information on how to provide the accesses to different roles for the entities, see **Manage user accounts, user licenses, and security roles**.
- To get the capacity released for the agents for entities other than incident (via incident resolution or cancellation), add a custom logic to deactivate the corresponding queue item. More information: **Create and manage capacity profiles**
- For non-case records, we recommend that you deactivate the associated queue item before deleting it.

Next steps

Close live work items or deactivate queue items

See also

Overview of unified routing
Set up record routing
Set up unified routing

Add a skill control for routed records

Article • 03/04/2022

Dynamics 365 provides a custom control that you can embed in your forms to view the skills of any routed record. To display the skill control for the routed record in the Customer Service workspace or Omnichannel for Customer Service app, add the control to the multisession form.

Prerequisites

- To add the skill control, you must have the System Administrator or System Customizer security role, or equivalent permissions. For more information about your security role, go to View your user profile.
- To ensure that the skill control is loaded and displayed for the routed records, you must allow access to these websites.

Add skill control

In the following example, to add a skill control named **Skills** to the case form:

1. In Dynamics 365, go to **Advanced Settings** and select the **Case for Interactive experience** form for the **Case** entity.

2. Drag and drop a **One Column** section on to the form. Then, from the **Field Explorer** pane, drag and drop a field that supports a single line of text such as **Case Title**.

3. Select **Change Properties** on the **Home** tab, and in the **Field Properties** dialog that opens, do the following:

    - On the **Display** tab, enter a label name for the field, such as **Skills**.
    - On the **Controls** tab, select **Add Control**. The **Add Control** dialog opens.
    - Select the **CC_OCRoutedEtnRelatedRecordsControl** custom control from the dropdown list, and then select **OK**.

4. Save and publish the solution.

At runtime, your agents will be able to view the skill control on all routed case records in Customer Service Hub.

Though we don't recommend setting up parameters for the skill control, if you want to manually enter the logical collection name or the relationship name of the record, you can use the following OData queries to get the information.

- **Logical collection name**: Run the following OData query and enter the same in the **Value** field of the **CC_OCRoutedEntityName_value** property.

  ```
  GET [Organization_URI]/api/data/v9.1/EntityDefinitions(LogicalName='{EntityLogicalName}')?$select=LogicalCollectionName,LogicalName
  ```

- **Relationship name**: Run any of the following OData queries for one-to-many, many-to-one, or many-to-many relationships, and enter the same in the **Value** field of the **CC_OCRoutedEntityRelationshipName_value** property.

  ```
  GET [Organization_URI]/api/data/v9.1/EntityDefinitions(LogicalName='incident')/OneToManyRelationships
  ```

  ```
  GET [Organization_URI]/api/data/v9.1/EntityDefinitions(LogicalName='incident')/ManyToOneRelationships
  ```

  ```
  GET [Organization_URI]/api/data/v9.1/EntityDefinitions(LogicalName=%27incident%27)/ManyToManyRelationships
  ```

See also

Overview of unified routing
Set up record routing
Set up unified routing
Query table definitions using the Web API
Add, configure, move, or delete components on a form

How to close live work items or deactivate queue items

Article • 02/17/2022

You can use the following sample code in your Console App (.NET framework) of Visual Studio to trigger the closure of live work items by deactivating the associated queue item.

For information about how you can modify the sample code to suit your environment, go to Quickstart: Organization service sample (C#).

C#

```
 static void Main(string[] args)
 {
     // e.g. https://yourorg.crm.dynamics.com
     string url = "<your environment url>";
     // e.g. you@yourorg.onmicrosoft.com
     string userName = "<your user name>";
     // e.g. y0urp455w0rd
     string password = "<your password>";

     string conn = $@"
     Url = {url};
     AuthType = OAuth;
     UserName = {userName};
     Password = {password};
     AppId = 51f81489-12ee-4a9e-aaae-a2591f45987d;
     RedirectUri = app://58145B91-0C36-4500-8554-080854F2AC97;
     LoginPrompt=Auto;
     RequireNewInstance = True";

     using (var svc = new CrmServiceClient(conn))
     {

         WhoAmIRequest request = new WhoAmIRequest();

         WhoAmIResponse response = (WhoAmIResponse)svc.Execute(request);

         Console.WriteLine("Your UserId is {0}", response.UserId);

         try
         {
             //Provide queueitem id as the second parameter which has to be
deactivated.
             svc.UpdateStateAndStatusForEntity("queueitem", new
Guid("6f15a7f0-8788-eb11-a812-000d3a593524"), 1, 2);
         }
         catch (Exception ex)
```

```
        {
            Console.WriteLine(ex.Message);
        }

        Console.WriteLine("Press any key to exit.");
        Console.ReadLine();
    }
}
```

See also

Overview of unified routing
Set up unified routing
How unified routing affects queue items and the corresponding APIs

Route non-case records using a plug-in

Article • 03/17/2023

You can trigger routing for non-case records such as email messages programmatically, using the IPlugin interface.

You can use the following sample code in your Console App (.NET framework) of Visual Studio. The code checks for the following two conditions and if they're met, it triggers the msdyn_ApplyRoutingRuleEntityRecord action.

- whether the Web service message is to create a record
- whether the record is an email message.

C#

```
public class SamplePlugin : IPlugin
{
    public void Execute(IServiceProvider serviceProvider)
    {
          // Obtain the tracing service
        ITracingService tracingService =
(ITracingService)serviceProvider.GetService(typeof(ITracingService));
        // Obtain the execution context from the service provider
        IPluginExecutionContext context =
(IPluginExecutionContext)serviceProvider.GetService(typeof(IPluginExecutionC
ontext));
            // Check if create message
            if (context.MessageName.ToLower().Equals("create"))
            {
                // The InputParameters collection contains all the data
passed in the message request
                if (context.InputParameters.Contains("Target") &&
context.InputParameters["Target"] is Entity)
                {
                    // Obtain the target entity from the input parameters
                    Entity entity =
(Entity)context.InputParameters["Target"];
                    // Target is an email
                    if (entity.LogicalName.ToLower().Equals("email"))
                    {
                        try
                        {
                            // Obtain the organization service reference
that you'll need for web service calls
                            IOrganizationServiceFactory serviceFactory =
(IOrganizationServiceFactory)serviceProvider.GetService(typeof(IOrganization
ServiceFactory));
                            IOrganizationService service =
serviceFactory.CreateOrganizationService(context.UserId);
                            // Execute msdyn_ApplyRoutingRuleEntityRecord
```

```
request
                                OrganizationRequest request = new
OrganizationRequest("msdyn_ApplyRoutingRuleEntityRecord");
                                request["Target"] = new EntityReference("email",
entity.Id);
                                service.Execute(request);
                            }
                            catch (Exception ex)
                            {
                                tracingService.Trace("SamplePlugin: {0}",
ex.ToString());
                                throw;
                            }
                        }
                    }
                }
            }
        }
```

See also

Overview of routing

Set up routing for records

Manually route records

Automatically route records using flow

Overview of case management

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Case management is the core record that tracks individual customer service issues across channels and agents over time. Customers want to have a long and happy relationship with brands over time, and throughout that relationship they may have several support inquiries through more than one support channel. To achieve this goal, Dynamics 365 Customer Service provides enhanced case configuration and improved case analytics for supervisors.

A case typically represents a situation or incident that's reported by a customer and requires a resolution. Cases are designed to track the process from the initial intake of an incident, through the remediation process, to the final resolution. Dynamics 365 Customer Service has several components that work together to provide an end-to-end case management solution that not only helps identify cases but also routes each case to the most appropriate agent who can provide guidance and resolve the case. Here are some of the most commonly used components:

- **Cases:** A case represents a single incident of service. In other words, it represents anything, in the context of a customer interaction, that requires some type of resolution or answer. Multiple cases can be associated with a single customer at any time.
- **Activities:** An activity typically represents an interaction with a customer, like a phone call. Multiple activities can be associated with a single case.
- **Entitlements:** Entitlements specify the amount of support services that a customer is entitled to. Think of them as support contracts.
- **Knowledge articles:** The knowledge base is a repository of informational articles that help customer service representatives resolve cases.
- **Queues:** A queue is a place to organize and store activities and cases that are waiting to be processed.

- **Service-level agreements (SLAs):** SLAs are a way to track and define what should happen when a case is opened, like how long it should take to respond to a customer.
- **Record creation and update rules:** Record creation and update rules can be applied to different activity types to automatically create Dynamics 365 records.
- **Routing rules:** Routing rules are applied to cases to automatically route them to a specific queue or user.
- **Business process flows:** A business process flow represents a guided process that has different stages and steps that are used to resolve a specific item, like a case.

As your organization tracks metrics on the types of cases that come in, you can create queues, routing rules, and flows to triage cases in the most efficient way.

See also

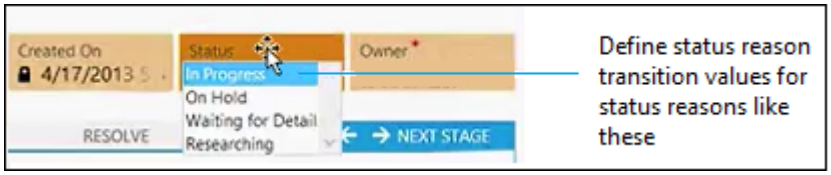
Set up record routing
Create cases
Automatically create or update records

Define status reason transitions for case management

Article • 02/18/2022

If you're in charge of incident management for an organization, it's important to provide a simple model for customer service representatives responsible for entering and updating case status. In Dynamics 365 Customer Service, there are two fields in the Case entity (record type) that work together to provide information about case status: the **Status** field and the **Status Reason** field. The **Status** field for the **Case** entity has three possible values: **Active**, **Resolved**, or **Canceled**. The **Status Reason** field stores a reason for a specific status value. For example, for a case with an **Active** status, a status reason could be **In Progress**, **On Hold**, **Waiting for Details**, or **Researching**.

Big organizations often have a large number of combinations for the **Status** and **Status Reason** fields. This can make it difficult for customer service reps to choose the correct next status reason. You can define status reason transitions to add another level of filtering for what the status reason value can be changed to for each status reason. Limiting these values to just allowed status reasons can help customer service representatives make the right choices.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

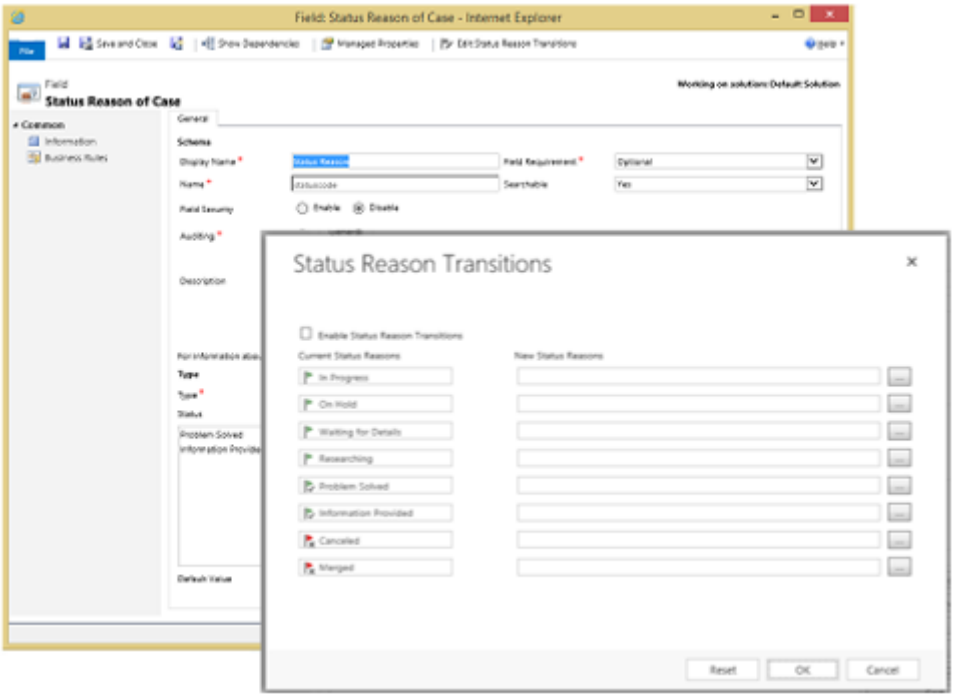
2. Go to **Settings** > **Customizations**.

3. Select **Customize the System**.

4. In the solution explorer, in the left navigation pane, expand **Entities**, expand the **Case** entity, and then double-click **Fields**.

5. Go to the second page of fields, and then open the **statuscode** (Status Reason of Case) field.

6. In the **Field: Status Reason** dialog box, click **Edit Status Reason Transitions** at the top of the dialog box.



7. In the **Status Reason Transitions** dialog box, under **New Status Reasons**, click one of the **Enter Value** buttons … corresponding with one of the existing status reasons.

8. In the **Select Status Reason** dialog box, in the **Available Values** list, select the values you want to add, and then click the chevron button » to add to the **Selected Values** list. Click **OK** when you're done with that status reason.

9. Click another **Enter Value** button … to modify other status reasons. When you're done, click **OK**.

   > **Note**
   >
   > Each status reason option for an active status must allow at least one path to an inactive status. Otherwise, you could create a condition where it would not be possible to resolve or cancel a case.

10. In the **Status Reason Transitions** dialog box, select the **Enable Status Reason Transitions** check box to apply the defined status reason transitions to case records. The list of available status reasons will be filtered for each case record based on the defined transitions.

See also

Define status reason transitions
Create or edit entity fields

Define parent and child case settings

Article • 10/10/2023

In Dynamics 365 Customer Service, you can track multiple issues for a customer, or track the same issue that's affecting multiple customers, using parent and child cases. For example, you could track a case where work needs to be done by other departments. The primary case or issue is called the **Parent** case. Any related cases are called **Child** cases. Before your service team can start using this feature, you need to go to **Service Management** and set up a few rules about how information is inherited.

Prerequisites

Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

Follow the steps in View your user profile. Don't have the correct permissions? Contact your system administrator.

Set parent and child case attributes

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Case Settings** in **Customer Support**. The **Case Settings** page appears.

   b. Select **Manage** for **Parent child case settings**.

2. In the **Case Settings** dialog, enter the following details:

   a. In **Select the attributes**, select the **Case Title** and **Customer** attributes that are mandatory and any other case attribute, which the child case will inherit.

   You can view **Available** and **Selected** attributes in two lists; use the arrows >, <, >>, and << to move the attributes from one list to another.

   b. In **Specify closure preference**, select a case closure setting that defines how parent and child cases are closed. Select one of the case closure options for parent and child cases:

- **Close all child cases when parent case is closed**: As soon as the parent case is closed, all the child cases are also closed.
- **Don't allow parent case closure until all child cases are closed**: The parent case can't be closed until all the child cases are closed.

c. In **Maximum number of child cases**, specify a number that denotes the number of child cases a parent case can have.

> ⓘ Note
>
> We recommend that you specify a smaller value for **Maximum number of child cases** to avoid performance issues when cases are resolved or merged.

3. Select **Save**.

Set parent and child case attributes (Customer Service app)

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   - Follow the steps in View your user profile. Don't have the correct permissions? Contact your system administrator.

2. On the nav bar, choose **Microsoft Dynamics 365** > **Settings**.

3. Choose **Settings** > **Service Management**.

4. Select **Parent and Child case settings**.

5. In the **Case Settings** dialog box, select the attributes that the child case will be inherit from the parent case.

6. Using the Parent and Child case settings, specify the information that will be inherited from a parent case to the child case. You can also select a case closure setting that defines how parent and child cases are closed. Select one of the case closure preference for parent and child cases:

   - **Close all child cases when parent case is closed**: The parent case can't be closed until all the child cases are closed.

   > ⓘ Note

If you choose **None**, parent and child cases are closed independently of each other. This is the default setting.

7. When you're done, select **OK**.

See also

Create and manage parent and child cases

Use advanced similarity rules to view similar case suggestions

Article • 06/28/2022

Quickly support your customers by viewing similar cases suggestions in the Customer Service Hub. As an administrator, you can now configure criteria using advanced similarity rules, so that agents can view cases similar to their current case and resolve customer issues in first contact and within minimal time frame. This helps to reduce operational cost and in turn increase customer satisfaction.

If an agent is working on a support case, they can view similar cases in the **Related** section of the current case, and resolve their case quickly. With the help of Relevance search, they can use keywords or key phrases in a service case to quickly find related cases and use them to resolve customer issues.

Similar case suggestion scenario

Gilda is resolving an issue where a customer isn't able to book a travel package on the portal. To assist the customer quickly, Gilda seeks guidance by looking for similar cases in the **Similar cases** tab in the **Related** section of the current case.

Based on configured data input, the Relevance search mechanism filters the cases using key phrases and suggests a list of cases. Gilda selects a relevant case and glances through the details. Gilda is able to resolve the customer issue with this suggested case and can also link the case to the current case for future reference.

Create a new similarity rule to view similar cases

Set up automatic suggestion of similar cases by creating advanced similarity rules. The rules you create use the Relevance search mechanism.

More information: Use Relevance Search for faster, comprehensive search results

> **ⓘ Important**
>
> It is recommended to enable Relevance search for your org to see the most accurate suggestions for similar cases. More information: **Understand how relevance search impacts search results**

1. Make sure you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   ### Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Navigate to the Customer Service admin center or Customer Service Hub app, and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Case Settings** in **Customer Support**. The **Case Settings** page appears.
   b. In the **Advanced similarity rules** section, select **Manage**.

   The **All Advanced Similarity Rules** page is displayed.

3. Select **New** on the command bar to create an advanced similarity rule.

4. Enter the following on the **Details** tab:

   - **Name** (required): The rule name.
   - **Source Entity** (required): Select Case entity for similar cases suggestions.
   - **Description**: A description of the similarity rule.
   - **Noise Key phrases**: Provide noise key phrases separated by a semicolon (;). These phrases will be filtered out in the search for a similar case.
   - **Filter Result by Status**: Filter records by status. If you set the value to **Active**, then only similar cases with active status will be retrieved. If you don't set a value, then it will retrieve similar cases that are in all statuses.

5. Select **Save** to save the rule.

6. On the **Match Fields** tab, select **New Text Analytics Entity Mapping** to add a related text analytics entity mapping record to the rule.

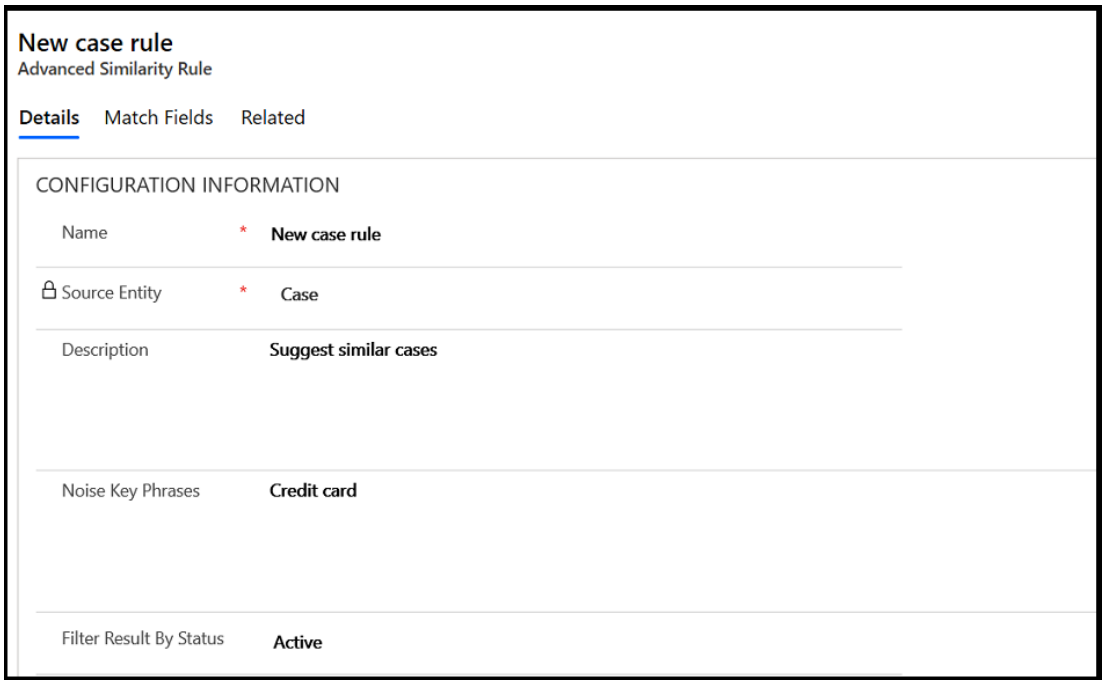
7. On the **Details** tab, enter the following values. These values are used to determine the keywords or key phrases from source records using relevance search to match with target records using text search. This helps to achieve keyword-based similarity between source and target records.

- **Criteria**: Select **Text match** if you want text in these fields to be used for finding key phrases to match. For example, if you select **Case Title** or **Description**, text in these fields will be matched. Select **Exact match** if you want all fields except single-line and multi-line text fields to be enabled for exact match. More information: Enable a field for exact matching of similar records

- **Entity** (required): Choose an entity from the drop-down list to be used to create a text search rule to find matching records in Dynamics 365 apps.

- **Field** (required): Choose the field to be used to create a text search rule to find matching target records.

  Two types of fields are used for similarity analysis:
  - **Structured**: Used for exact match on a field to field basis. All fields except Multiple Lines of Text are available for exact match. Each field can be used only once.
  - **Text**: Fields of type Text or Option Set only are available. For Option Set, the corresponding label in the language of the user is used. Text fields are used for fuzzy match in similarity analysis with keywords/key phrase extraction. Each field can be used only once.



8. Select **Save** to save the rule.

9. Select **Activate** from the command bar to activate the rule.

Similarly, add more mappings to view a comprehensive search of related records.

Understand how relevance search impacts search results

See the below table to understand how search results are impacted when Relevance search is enabled or disabled.

Relevance search disabled	Relevance search enabled
Considering similarity rules, search is performed across primary field of an entity.	Considering attributes configured in similarity rules, search is performed on entity attributes configured for relevance search.
For example, if similarity rules are configured on Title and Category, comma-separated attribute text is passed to look for a match in the Case title of case entity.	For example, if similarity rules are configured on Title and Category, and Relevance search is enabled on Description, the search is performed for Title and Category in the Description field of case entity.

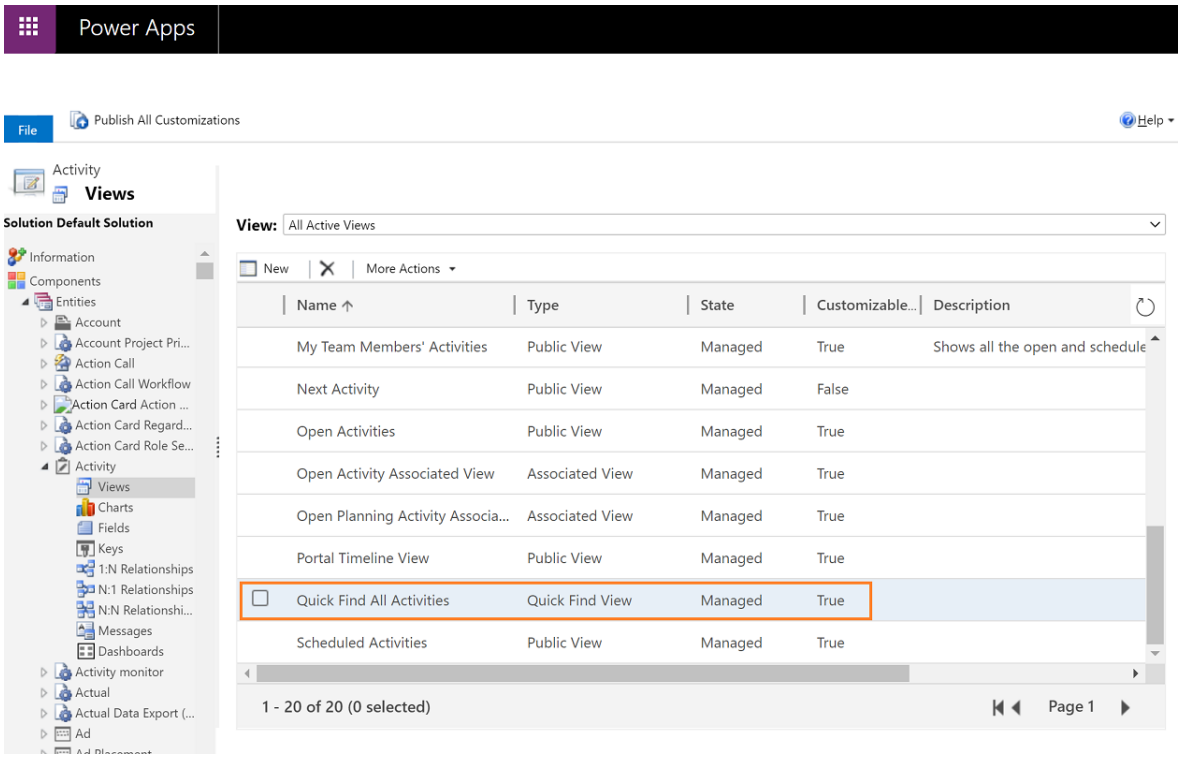
Enable a field for exact matching of similar cases

Follow the below steps to enable a field for exact match of similar cases.

1. Go to **Settings** > **Advanced Settings**.
2. Select the **Settings** > **Customizations**.
3. On the **Customizations** page, select **Customize the System**.

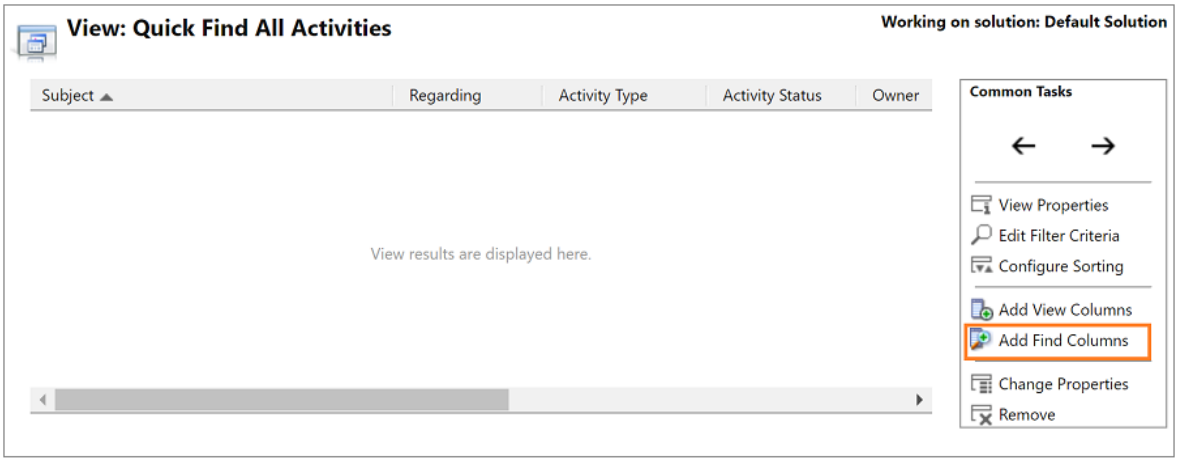
   The **Information** page is displayed.
4. In the left pane, expand **Entities**, go to the entity you want to customize, expand it, and then select **Views**.

   A view page with a list of items is displayed.
5. Double-click **Quick Find </entity name>** for the entity. (Note: You might need to scroll down to find this option.)



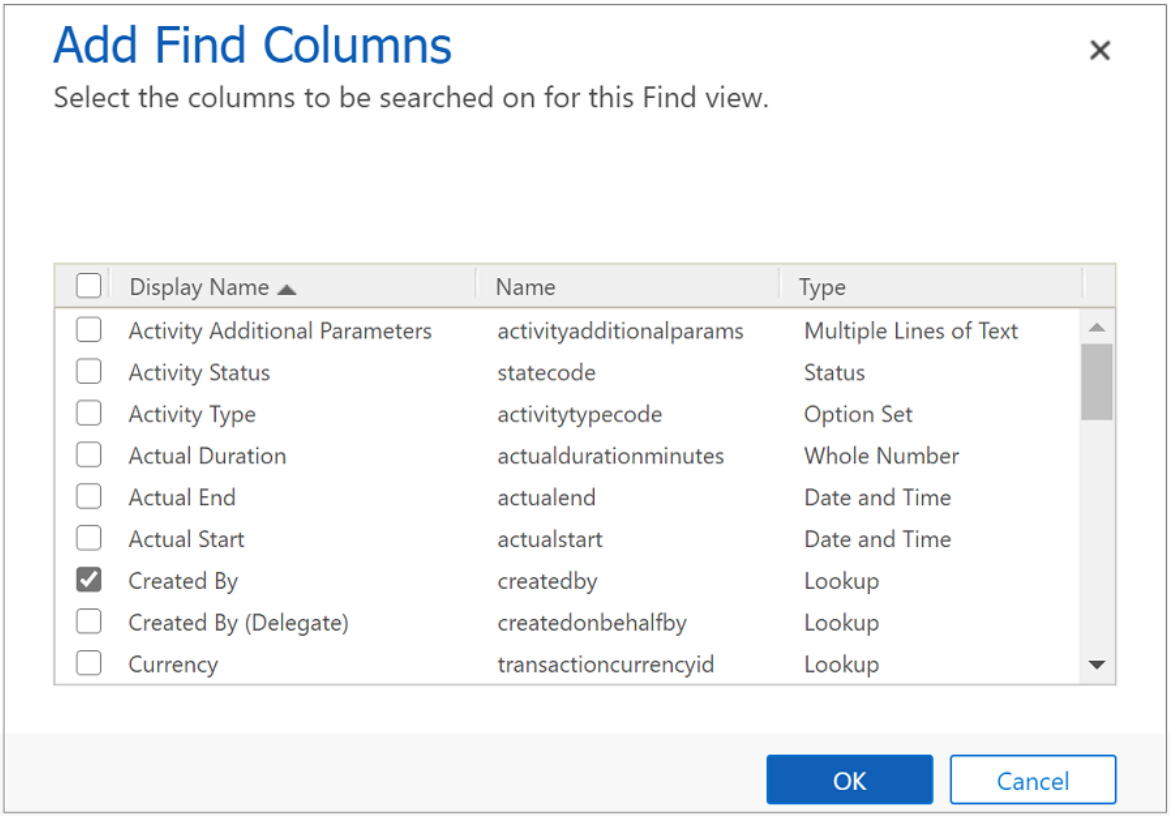
A view page is displayed.

6. On the right-hand side, select **Add Find Columns**.



The **Add Find Columns** page is displayed.

7. Select the checkbox for the entity you want to be an exact match field.



8. Select **OK**

   You're returned to the **Quick Find </entity name>** page.

9. Select **Save and Close**.

   You're returned to the **Settings** page.

10. Select **Publish All Customizations** to finish enabling exact matching for the field.

> **Note**
>
> For a field to be eligible for exact matching, it must meet the following criteria:
>
> - It can't be a Primary Key.
> - It can't be these types: String, Memo, Picklist, Boolean, Whole Number, Two Options, Date and Time, or Floating Point Number.
> - It can be these types: Lookup, OptionSet, Customer, Owner, Status, State, Status Reason.

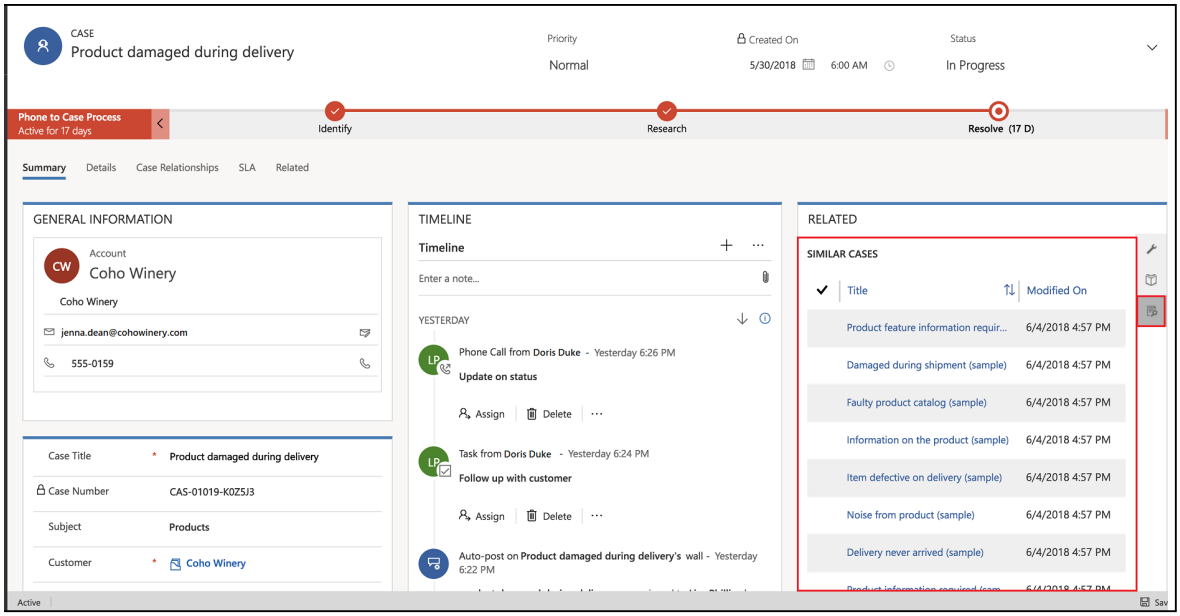
See similar case suggestions in the Customer Service Hub

You can view the similar case suggestions in the Related section of the Customer Service Hub.

More information: See and manage related records in the Related section

1. In the Customer Service Hub, navigate to **Service** > **Cases** and open a case from the **My Active Cases** view.

2. Select the **Similar Cases** in the **Related** section to view cases similar to the current case.



> **Note**
>
> The "similar cases" action is not available in the business process flow in Customer Service Hub. As a workaround, you can customize the business process flow to add the action. For information about customizing the business process flow, see **Add an action to a business process flow**.

See also

Enable AI suggestions for similar cases and knowledge articles
Related section in the Customer Service Hub
Configure Customer Service

Create and manage subjects in a subject tree

Article • 08/01/2023

Dynamics 365 Customer Service includes a subject organizational structure that lets you group service cases and knowledge base articles. By using the subject hierarchy, you can classify service cases to quickly provide service to your customer.

The search control for the subject tree entity is available by default for out-of-the-box and custom forms. If you'd like to disable the search control, please contact Microsoft support.

> **Note**
>
> The availability of search control by default is an early access feature. You can opt in early to enable these features in your environment, which will allow you to test these features and then adopt them across your environments. For information about how to enable these features, see **Opt in to early access updates**.

Create or edit a subject

Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

You can create or edit a subject in the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

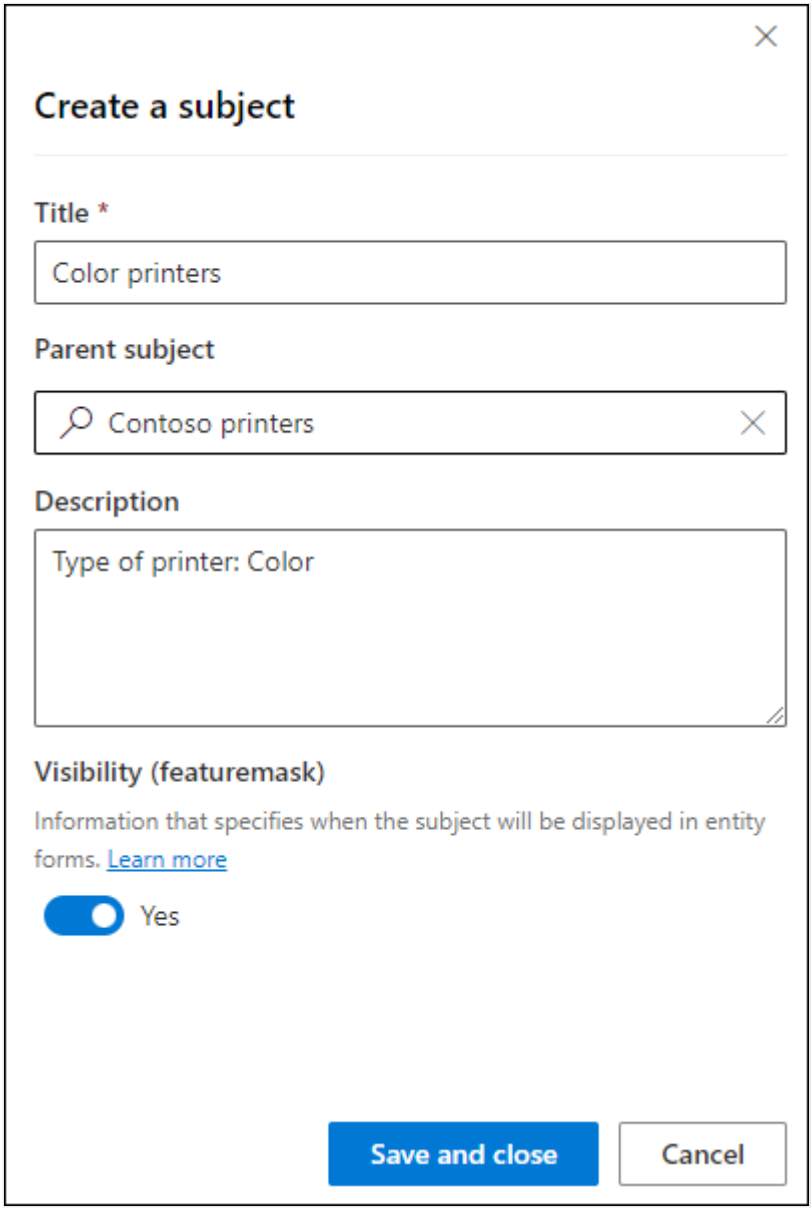
   a. In the site map, select **Case Settings** in **Customer Support**. The **Case Settings** page appears.
   b. In the **Subjects** section, select **Manage**.

2. On the **Subject tree** page, in the **Subject tree management** area, select **Add**.

3. In the **Create a subject** dialog, enter the following information:

   - **Title**: Type a name for the subject.

- **Parent subject**: Search for and select a parent subject. Leave it blank if you want the new subject to be a parent subject.
- **Description**: Type a descriptive statement about the subject.
- Switch the **Visibility** toggle on if you want the subject to be available for the agent.



4. Select **Save and close**.
5. To edit a subject, select a subject, and then select **Edit**. You can also select **More commands** to display the actions, such as **Edit** or **Add**, that you can take for the selected subject.

> ⓘ Note
>
> If you select a subject in the subject tree and select **Add**, clear the selection in the **Parent subject** box to make it a parent subject. Otherwise, the new subject

will be added as a child of selected subject.

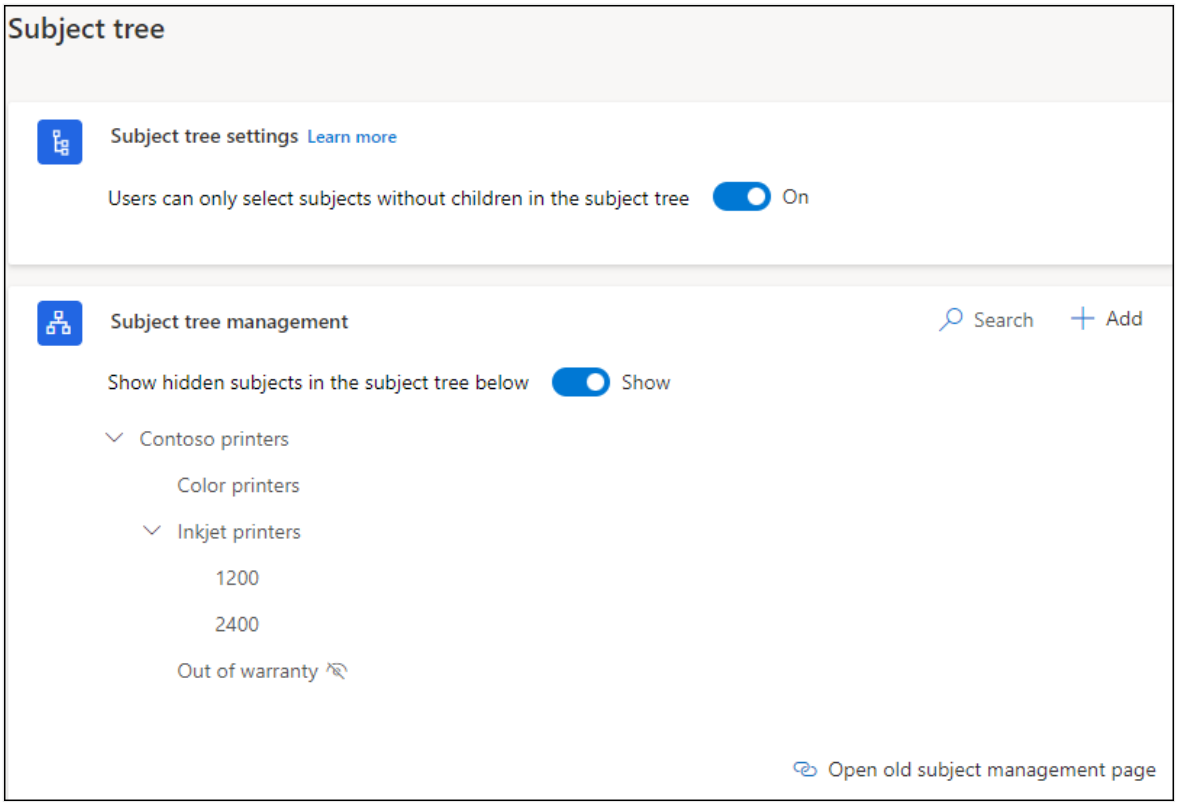
Delete a subject

To delete a subject from the subject tree, select the subject and select **Delete**.

Manage the subject tree

The following options are available for subjects:

- **Users can only select subjects without children in the subject tree**: Switch the toggle on. At runtime, users will be able to select only those subjects that don't have child subjects. This setting allows administrators to make sure that agents select only specific subjects.
- **Show hidden subjects in the subject tree below**: Set the toggle to **Show**. In the subject tree, the subjects that are marked as hidden are displayed with the hidden icon. This setting allows administrators to preview the runtime functionality of the visibility of subjects to agents.
- **Search**: Use the search option to search for a subject by name and perform the different actions that are allowed for the subject. The subject that you search fo is highlighted and displayed in the subject tree. This setting allows you to easily locate the subject and child subjects instead of manually scrolling through the subject list.



You can select **Open old subject management page** to use the older experience. However, to revert to the new experience, you'll need to navigate to **Subjects** from the site map.

> **Note**
>
> We recommend that you create not more than 1,000 subjects including child subjects to avoid performance issues.

See also

Configure Customer Service
Overview of case management
Enable search control for the subject entity

Enable case grids

Article • 07/03/2023

Increase your agent's productivity by providing quick access to information, such as the last customer interaction, case age, and the next SLA breach, with modernized case grids. The modern UI presents data in an intuitive manner that helps you and your agents perform inline edits and quick operations with minimal clicks, thereby facilitating decision-making.

Key features

The following are some of the key features of the modernized case grids:

- A view called **Enhanced Active Cases**, which includes a set of predefined columns where you can:
  - View icons for **Priority** and the **Origin** channel.
  - View avatars for the assigned **Owner**.
  - View key data, such as **Case Age**, **Next SLA**, and **Last Interaction** with attachments.
- The ability to perform inline edits and update data for columns. For example, you can double-click the **Priority** column to change the priority of the case or set the toggle to **Yes** or **No** in the **Is Escalated** column. The updated data is automatically saved only when you move to the next row. Currently, inline editing for the **Status reason** column isn't supported.
- The ability to use quick navigation to respond to the latest interaction.

Enable the grid control for the Case entity

To make the **Enhanced Active Cases** view accessible to agents, you must enable the **Power Apps grid control** option on the Power Apps portal.

1. Go to the https://make.powerapps.com . portal.
2. Select **Solutions**. The **Solutions** page appears.
3. On the **Solutions** page, select **Default Solution**.
4. On the left pane on the **Default Solution** page, select **Tables**, and then select **Case**.
5. Select **Switch to classic**.

6. On the **Case** page, in the **Controls** section, select **Add Control**.

7. In the **Add Control** dialog, select **Power Apps grid control** > **Add**.

8. On the **Controls** tab, do the following:
   a. In the **Controls** section, for **Power Apps grid control**, select **Web**, **Phone**, and **Tablet** radio button/options.
   b. In the **Property** section in the **Customizer Control** field, select **Edit**. The **Configure property "Customizer Control Name"** dialog appears.
   c. In the **Configure property "Customizer Control Name"** dialog, select **Bind to a static value option**. For **Singleline.Text**, select **MscrmControls.CustomCellControl.CustomCellControl**, and then select **OK**.
   d. To enable inline editing, do the following:
   e. In the **Property** section in **Enable editing**, select **Edit**. The **Configure property Enable Editing** dialog appears.
   f. In the **Configure property Enable Editing** dialog, select **Bind to static options**, select **Yes** from the dropdown list, and then select **OK**.
   g. Set **Enable OptionSet colors** to **Yes** to display color coded case status fields.

   > ⓘ Note
   >
   > Any changes made by Microsoft to the default color palette won't be available automatically if you've customized the colors that appear on the case status field.

9. Select **Save**, and then select **Publish**.

> ⓘ Note
>
> New columns that have been introduced as part of a solution will be available in the environment, after the solution is installed. The user's experience of these columns will depend on whether the modernized grids have been enabled.

Enable the Enhanced Active Cases view in Customer Service workspace

To make the **Enhanced Active Cases** view accessible to agents in Customer Service workspace:

1. Go to your environment by using your organization link.

2. In the Customer Service Workspace Model Driven App, from the list of apps, select **More Options**, and then select **Open in App Designer**.
3. Go to **Components** > **Entity Assets** > **Views**, and then select the **Case** entity.
4. On the Components tab, search for **Enhanced Active Cases** view, and then select the checkbox.
5. Select **Save**, and then select **Publish**.

Customize the case grid

Add columns to the case grid

1. Go to the https://make.powerapps.com portal.
2. Select **Solutions**. The **Solutions** page appears.
3. On the **Solutions** page, select **Default Solution**.
4. On the left pane on the **Default Solution** page, select **Tables**, and then select **Case**.
5. On the **Case** page, select **Views**.
6. Select the case type that you want to update, for example, **All Cases**.
7. On the **View** page, select **+ View** column.
8. In the **View column** dialog, search for the column that you want to add—for example, the **Last Interaction** column. The **Last Interaction** column now appears on the **View** page.
9. Select **Save**, and then select **Publish**.

Add new icons for Origin and Priority Columns

In the following example, you add a new **Option Set Value** for the **Priority** and **Origin** column.

1. Go to https://make.powerapps.com portal.
2. Select **Solutions**.
3. Select the solution in which you want to add the web resource.

4. Select **New** > **More** > **Web resource**.

5. In the **New web resource** dialog, enter the following:
   a. Upload your file by selecting the **Upload file** option.
   b. In the **Display name** field, enter a display name.
   c. In the **Name** field, enter the name in the format: **Incident/Priority/{Option Set Value}PriorityIcon.{File Extension}** or **Incident/Origin/{Option Set Value}OriginIcon.{File Extension}**. For example, **Incident/Priority/100000000PriorityIcon.png**.

6. Select **Save**.

See also

Enable entities for service-level agreements

Troubleshoot issues in SLAs

Customize the case resolution experience

Article • 04/19/2023

Customize the case resolution experience in Power apps as follows:

- When agents try to close a case with open activities, the application displays a warning message with a redirect link. You can configure the tab agents view when they select this link.
- Choose to display the legacy **Resolve case** dialog instead of the default minimal **Resolve case** dialog when an agent closes a case with open activities.

Redirect users to a specific tab to close the open activities for a case

You can configure the tab users must be redirected to when they select the open activities link on the **Resolve Case** dialog. You'll need to add and configure the **Redirect user to the specified tab to close open activities** setting definition in Power Apps to set the tab at an environment level or for a specific app.

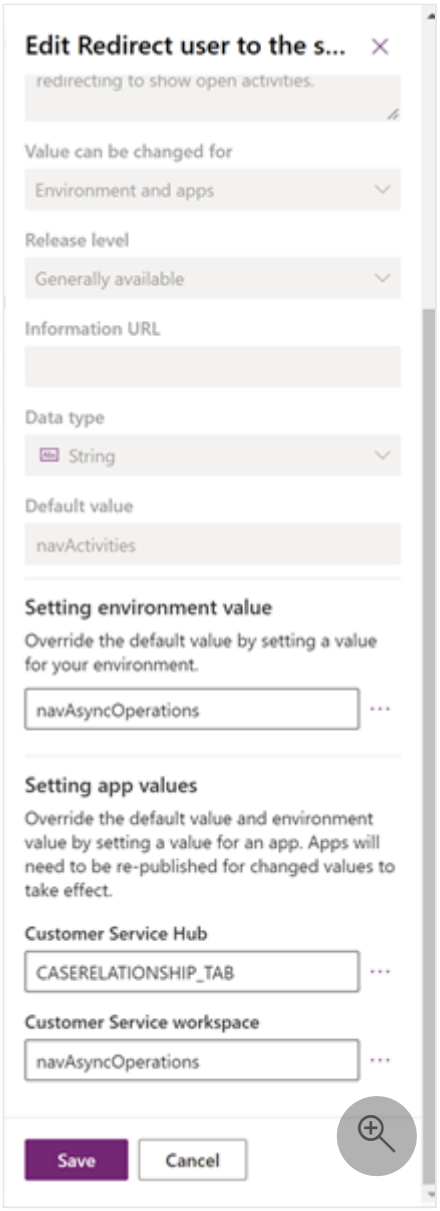
1. In Power Apps, add the **Redirect user to the specified tab to close open activities** setting definition. More information: Add an existing setting definition.

2. You'll need to update the setting definition with the tab name. To find the tab's name, perform the following steps:

    - Navigate to a form which has the required tab.
    - Select the tab, and then copy the value in **Name** in **Display options**.

3. In the **Edit Redirect user to the specified tab to close open activities** pane, paste the name in the **Setting environment value** option. More information: Update a setting definition.

4. Optionally, in the **Setting app values** section, or a required app, you can set the tab in **New app value**. The tab set at the application level overrides the environment level setting.



5. Select **Publish All Customizations**.

Disable the minimal case resolution dialog

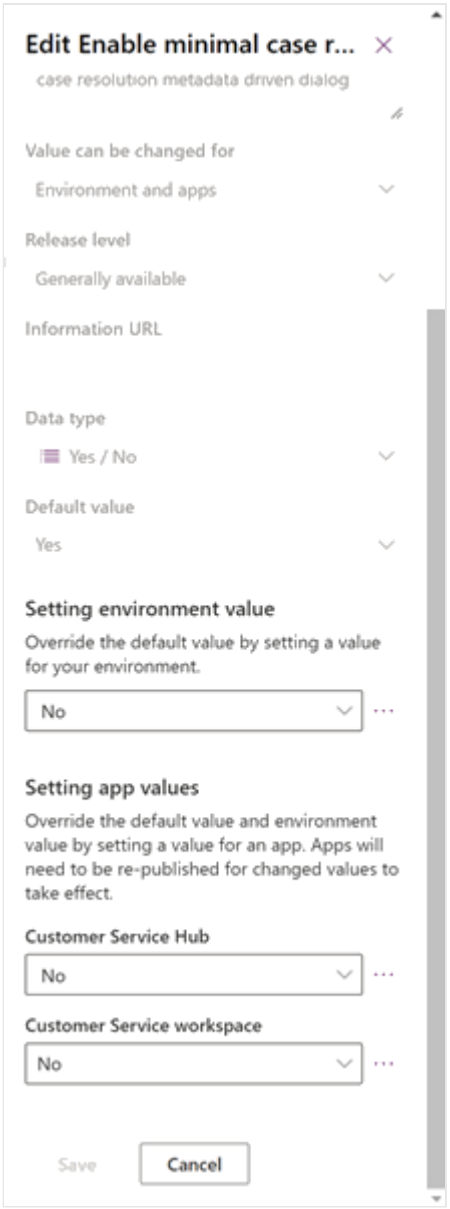
You can choose to display the legacy case resolution dialog box that appears when an agent selects **Resolve case**. You'll need to add and configure the **Enable minimal case resolution dialog** setting definition in Power Apps to revert to the legacy case resolution dialog.

> ⓘ Note
>
> - You can revert to the legacy case resolution dialog only if the **Case settings** > **Other settings** > **Resolve case dialog** is set to **Standard dialog** in Customer Service admin center.

- If **Resolve case dialog** is set to **Customizable dialog** or **Quick create dialog**, to add **Duration**, **Billable TIme**, **Total Time** and other customizations, perform the steps in **Modify the case resolution dialog**.

Perform the following steps:

1. In Power Apps, add the **Enable minimal case resolution dialog** setting definition. More information: Add an existing setting definition.
2. In the **Edit Enable minimal case resolution dialog** pane, set the **Setting environment value** option to **No**. More information: Update a setting definition.
3. Optionally, in the **Setting app values** section, for a required app, you can set the value to **No** in **New app value**. The tab set at the application level overrides the environment level setting.



4. Select **Publish All Customizations**.

See also

Work with cases
Work with queues

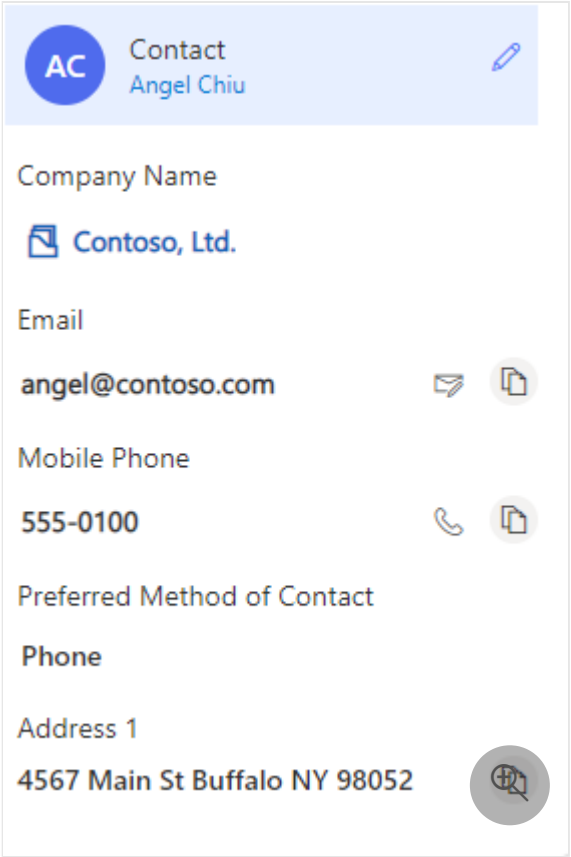
Configure components to display customer details and recent records

Article • 04/27/2023

Use the **Customer 360** and **Recent records** components to display the customer details and related records for a case.

Add the Customer 360 component to a case form

After you add the **Customer 360** control to a case form, when an agent selects a customer in the Customer field, the customer details are displayed as follows:



Do the following tasks to add the control. You can use these steps to display customer records on any entity where the Customer lookup is available.

Step 1: Add the **Customer 360** component to forms in the **Account** and **Contact** tables.
Step 2: On the **Case** form, add the **Account** and **Contact** forms on which the component was added. More information: Edit related table records directly from another table's main form.

You can add the **Customer 360** card to a custom form in Customer Service workspace and Omnichannel for Customer Service. Perform the steps in View the customer details in an app side pane on a custom form section to add the Customer 360 card to a customized form.

Step 1: Add the Customer 360 component to Contact and Account forms

1. In Power Apps, select the environment that contains your solution.
2. Select **Tables**, select **Account**, and then select the **Forms** area.
3. Create a new form or use an existing form. More information: Create, edit, or configure forms using the model-driven form designer.

   > **Note**
   >
   > You must hide all the elements that are already available on the form.

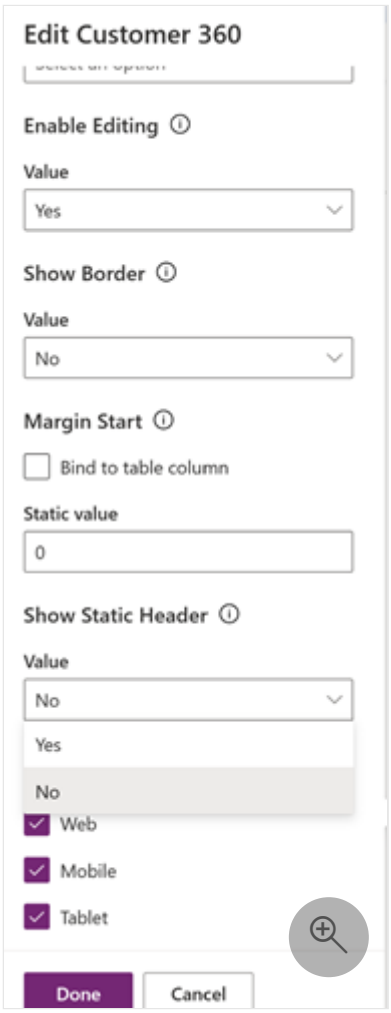
4. In the form designer, select **Components** from the left navigation, and then select **Customer 360**.
5. Drag it to the form.
6. On the **Properties** panel, do the following actions:

   - Select the attributes from the table that must be displayed as fields on the form to the user. You can select up to seven simple and three composite attributes.
   - Specify if the users can edit the fields in the card in the **Enable Editing** drop down. This field is set to **Yes** by default.
   - The control header displays the contact name or account name when a contact or account is selected from the customer lookup on the form. If you want the control header to display a static header, specify **Static Value** and set **Show Static Header** to **Yes**.
   - Set the **Enable Rich Text Editor for Multiline Text Fields** to **Yes** for the rich text editor control to be enabled for multi-line text columns.

   > **Note**
   >
   > If the multi-line text field is defined as rich-text on other forms, you can enable the rich text editor for this field on Customer 360 component. If you

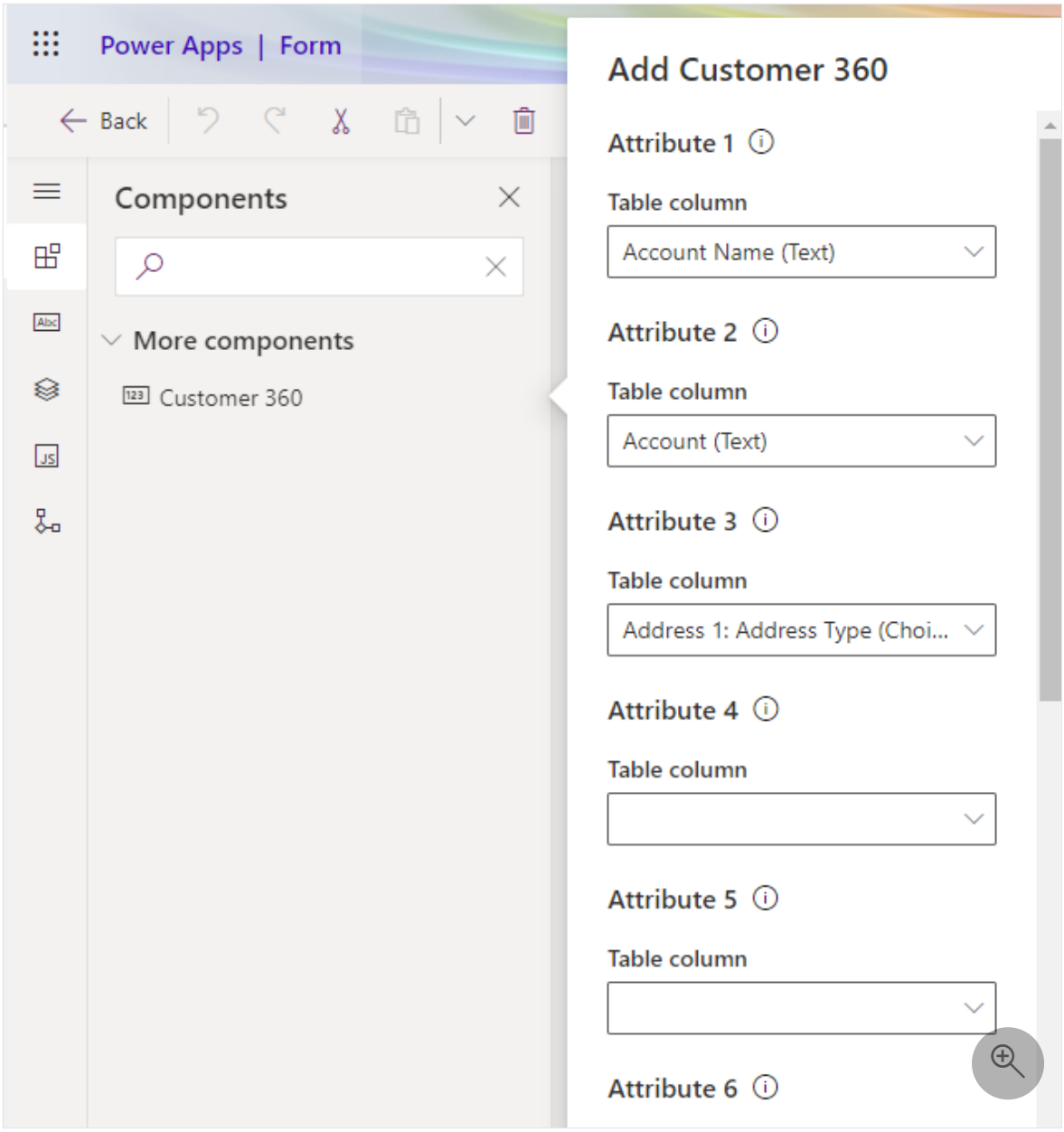
don't enable this, users might see html tags in the field if the field has formatted content.

- If you'd like to add advanced configuration for the rich text editor control, specify the **Custom Rich Text Editor Configuration URL**. More information: Create and use advanced configuration for the rich text editor control



- Save and publish the form.

7. Repeat steps 3 to 6 for the **Contact** table.



Step 2: Add the Customer or Account form with the Customer 360 component to the Case form

1. In the same environment, select **Case** from **Tables**, and then select the **Forms** area.
2. Select the required form.
3. In the form designer, select **Table columns** from the left navigation, clear the **Show only unused table columns** checkbox.
4. Select **Customer**, and then drag it on the form.
5. In the **Properties** section of the **Customer** lookup, do the following:
   a. Select **Components**, and then select **Add Component**.
   b. Select **Form**.
   c. On **Add Form**, select **Related form**. The **Add related form** flyout appears. Specify the following:

      - **Related table**: Account

- **Related form**: The form with the **Customer 360** component.

d. Do the steps above to add the **Contact** table and the new form with the **Customer 360** component.
e. Save and publish the changes.

View the customer details in an app side pane on a custom form

Perform the following steps to view the customer details in an app side pane, when the agent changes the customer or account name.

1. In Power Apps, you must add the event handler function for the On Change event of the **Customer** or **Account**. More information: Add or remove event handler function to event using UI.
2. Specify the following details in **Configure Event**:
   a. **Event Type**: **On Change**
   b. **Library**: **ModernCaseManagement/Incident/msdyn_ModernCaseManagement**. If this value isn't available in the Library dropdown, select **Add Library** and add the option.
   c. **Function**: **ModernCaseManagement.ModernCaseManagementLibrary.onCustomerChange**
   d. Select **Enabled** and **Pass execution context as first parameter**.
3. Save and publish the changes.

Display customer details when an existing record is opened

If agents should see the customer details in an app side pane when they open an existing record with the customer or account name populated, add the following function to your customer script for the On Load event: `ModernCaseManagement.ModernCaseManagementLibrary.onCustomerChange(executionContext);`.

Add the Recent records component

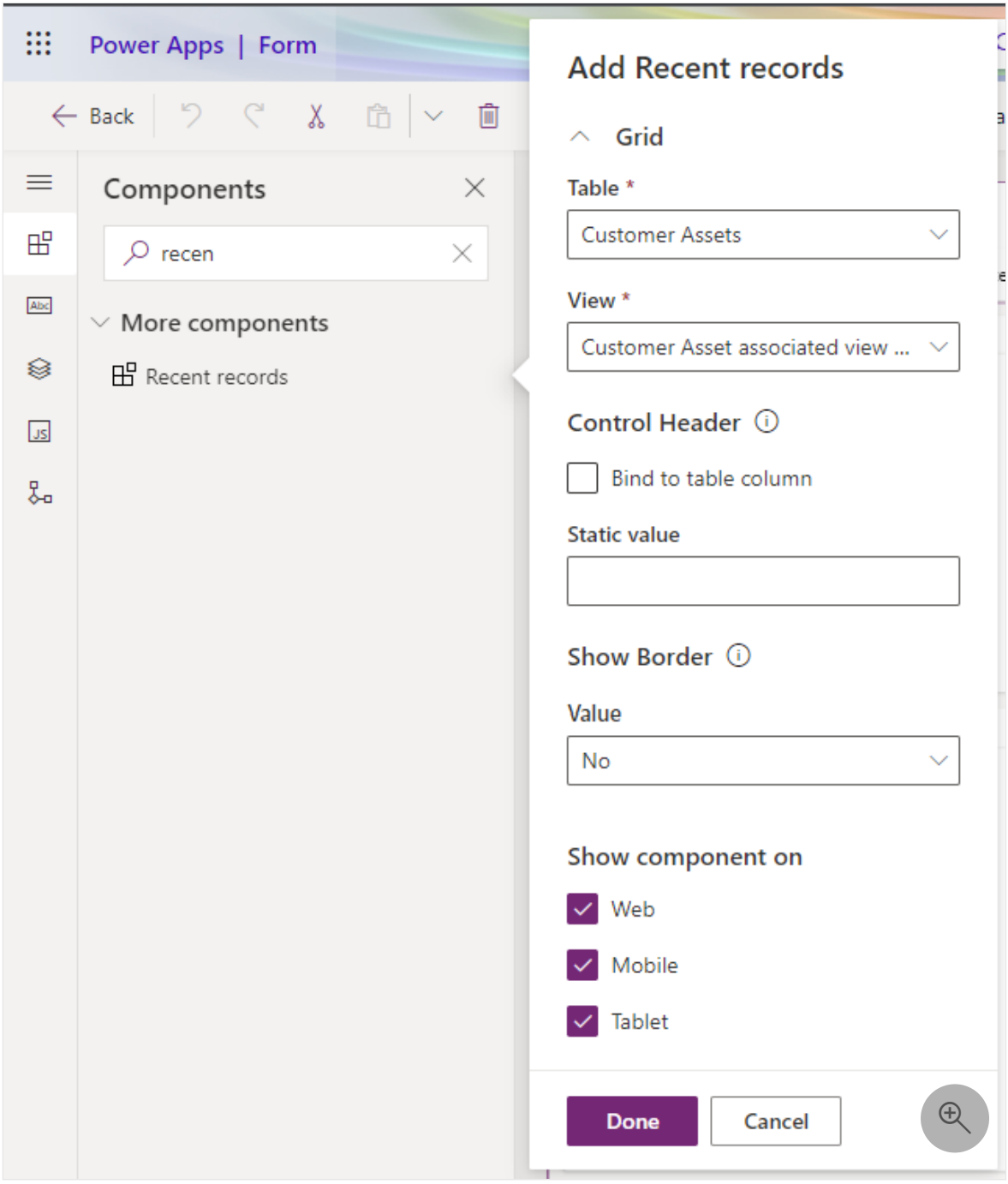
1. In Power Apps, select the environment that contains your solution.
2. Select **Tables**, select the required table, and then select the **Forms** area.
3. Select the required entity.

4. In the form designer, select **Components** from the left navigation, and then select **Recent records**.

5. Drag it onto the form.

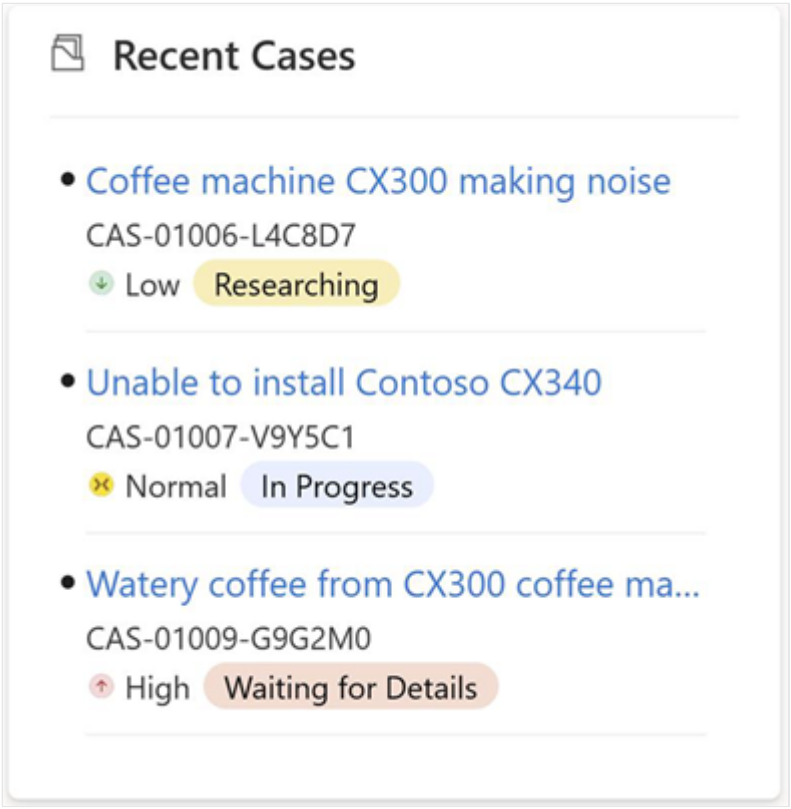
6. On the **Properties** panel, do the following:

   - Specify the **Table** from which the records must be displayed.
   - Select the **Default view** and **Default chart**. The views and charts available in the table are displayed.
   - Specify the maximum number of rows the card must display when it loads. The default number of rows displayed is four.



7. Save and publish the changes.

The Recent records control displays the related records as follows, if you select **Case** in the **Table** field.



See also

Create, edit, or configure forms using the model-driven form designer

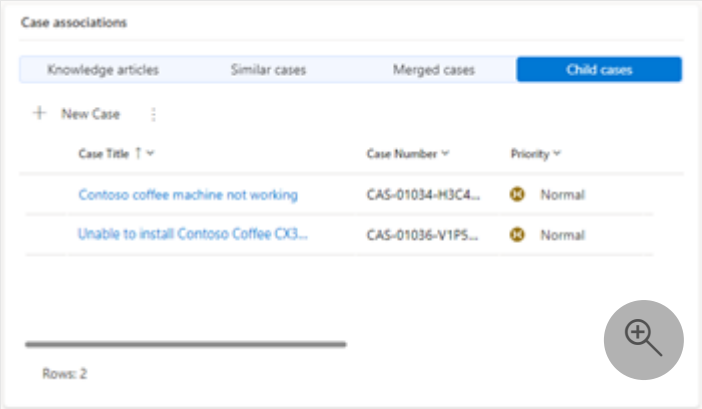
Edit related table records directly from another table's main form

Configure components to display case associations

Article • 02/27/2023

The **Associated Grid Control** component helps you display details related to a record as subgrids. You can configure up to four subgrids using this component.

The following screenshot is an example of how you can display knowledge articles, similar, merged, and child cases related to a case using **Associated Grid Control** :



Add the component and configure the subgrid

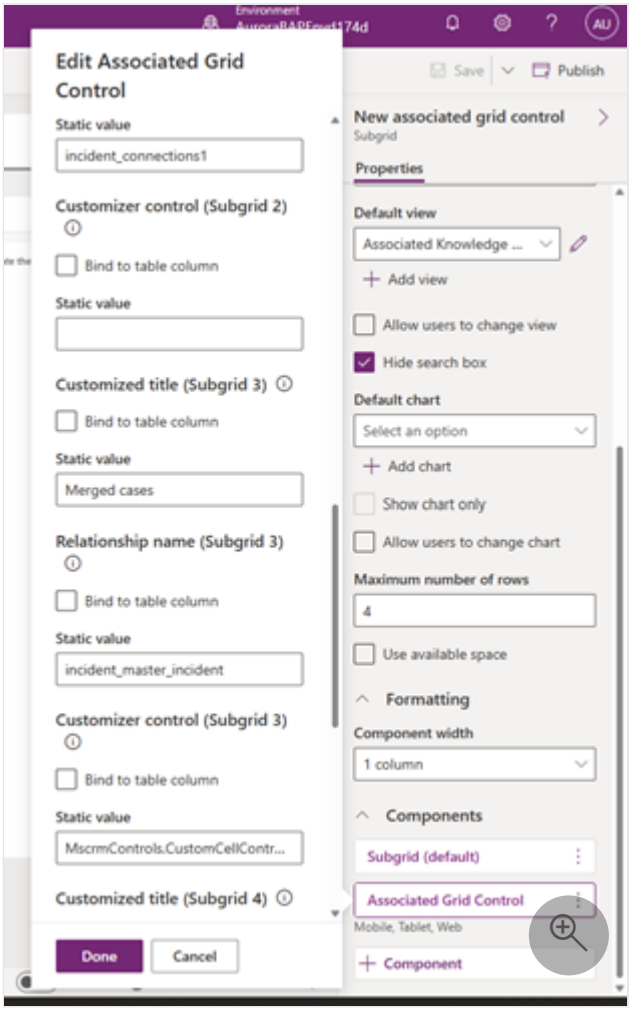
1. In Power Apps, select the environment that contains your solution.
2. Select **Tables**, select a table, and then select the **Forms** area.
3. Open the form to which you want to add **Associated Grid Control**.
4. In the form designer, select **Components** from the left navigation, and then select **Associated Grid Control**.
5. Drag it to the form.
6. On the **Properties** panel, specify the following details to populate the records to be displayed on the first subgrid.
    - Add **Table** and **Default view** from which the records must be displayed.
    - Select **Show related records** if you'd like to display only records that are related to the current record on the form and not all the available records. If you select this checkbox, the form displays only the related records in **Subgrid 1**.

7. To customize the subgrid further, select **Associated Grid Control** in **Components**. Specify the following values in the **Edit Associated Grid Control** pane that appears:

    - **Customizer control**: Specify the customizer control name for the entity. For example, you've configured a subgrid to display child cases. For the subgrid to display color-coded priority icons, you'll need to set the value of this field to **MscrmControls.CustomCellControl.CustomCellControl**. More information: Enable the grid control for the Case entity
    - **Customized title**: Specify the display name that appears as the subgrid's name when the card loads. The original view name is displayed by default if you don't specify a value for this field.

8. To configure subgrids 2 to 4, specify the values for **Table**, **Default View**, **Customizer control**, and **Customizer control** for the corresponding subgrids in the **Edit Associated Grid Control** pane.

9. You'll also have to specify the table relationship in **Relationship Name** to display the related records in **Subgrid 2** to **Subrgid 4**.



Configure related records for multiple subgrids

You can select **Show related records** check box to display the related records for only **Subgrid 1** in **Associated Grid Control**. To display related records in **Subgrid 2** to **Subgrid 4** you need to specify the corresponding table relationships in **Relationship name**. Table relationships allow for queries to retrieve related data efficiently. More information: Table relationships overview.

To find the relationship between tables, do the following steps:

1. In Power Apps, select the **Table** that contains the form you've added the **Associated Grid Control** to.
2. Select **Relationships** from **Schema**.
3. On the page that appears, find the table you've added to the subgrid in **Associated Grid Control**.
4. Copy the **Name** that's against the table.
5. Open the form where you've added the **Associated Grid Control**.
6. Specify the name as the **Relationship Name** in **Edit Associated Grid Control**.

Add an alternate grid control

Out-of-the-box, **Associated Grid Control** uses the Power Apps grid control that supports the latest Microsoft accessibility standards and is built to be performant, extensible for the future, and aligns with the latest guidance for fonts, sizing, and styling. However, you can choose to add an alternate grid control.

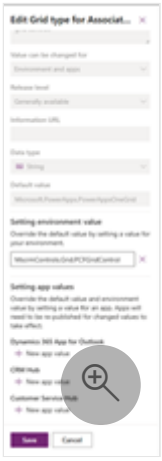
Perform the following steps:

1. In Power Apps, select the environment that contains your solution.
2. Select **Solutions**, and then select the required solution.
3. Select **Add Existing** > **More** > **Setting**.
4. On the **Add existing Setting Definition** pane, select the **Grid type for Associated grid control** option and then select **Next**.
5. Select **Add** on the **Selected Setting Definition** to add the **Grid type for Associated grid control** option to your solution.
6. Go to **Add Existing** > **App** > **Model-driven app**> **Add existing model-driven apps** pane.
7. Select the **Grid type for Associated grid control** option. The **Edit Grid type for Associated grid control** pane appears. The **Default value** is set to **Microsoft.PowerApps.PowerAppsOneGrid**.

8. Select **Add existing value** in **Setting environment value**. Specify **MscrmControls.Grid.PCFGridControl** to replace the default values for all the apps in your environment.

9. Optionally, select **New app value** for the app. For a specified app, the tab set at the application level overrides the environment level setting.

10. Select **Publish All Customizations**.



See also

Overview of the model-driven form designer

Enable enhanced case forms for multisession apps

Article • 09/25/2023

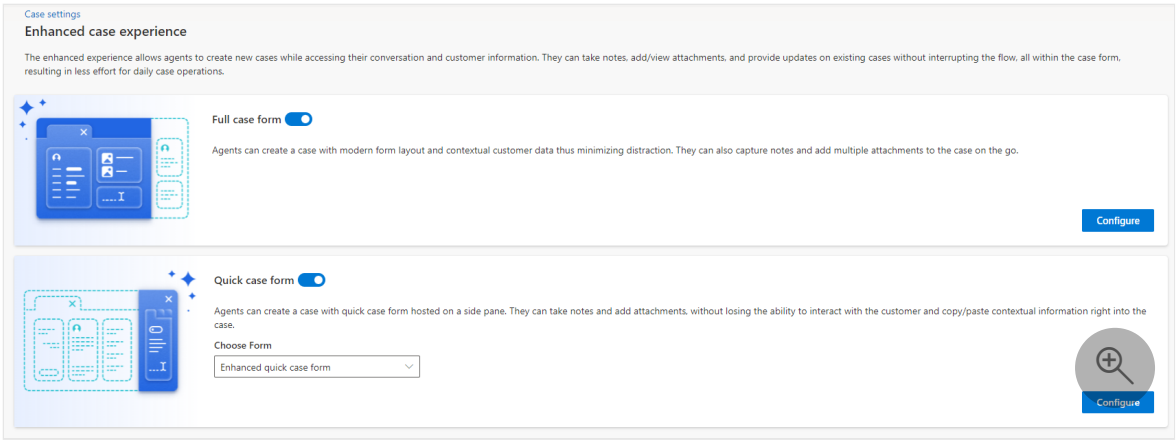
Enable the enhanced **Quick case form** and **Full case form** options, so that your agents can see the enhanced quick case form and full case form, when they create a new case in Customer Service workspace.

> **Note**
>
> The enhanced case creation experience is available in the Customer Service workspace app only.

Enable enhanced case experience

To enable the enhanced case forms, perform the following steps:

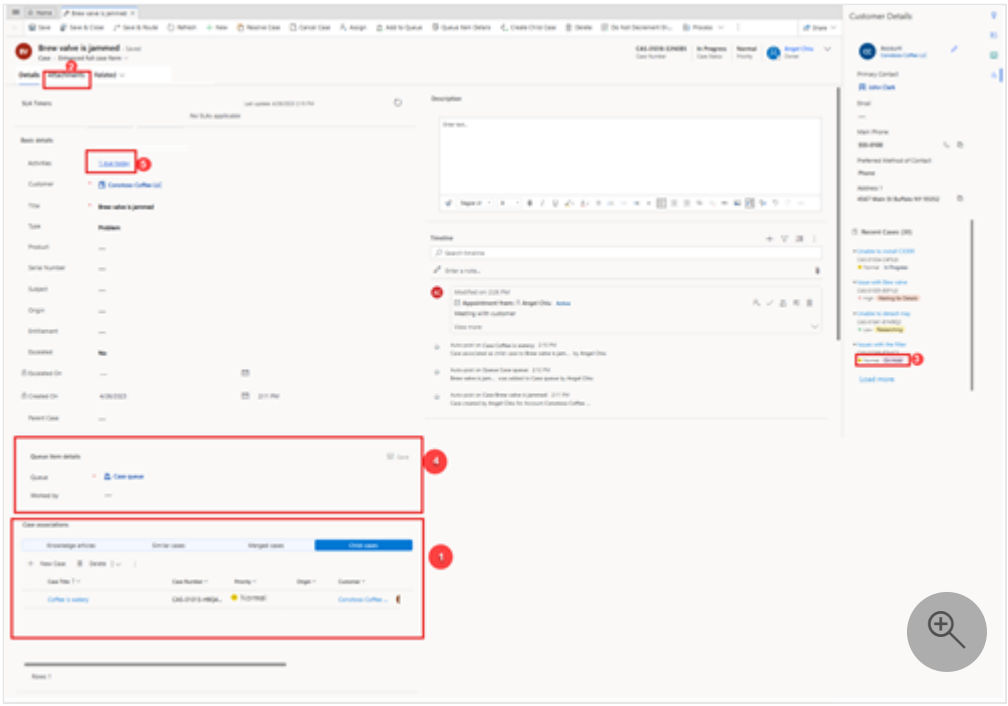
1. In Customer Service admin center, go to **Case Settings**.
2. Select **Manage** for **Enhanced case experience**.
3. Switch the **Enhanced case experience** toggle to **Yes**.
    - To enable the enhanced full case form:
        a. Set the **Full case form** toggle to **Yes**, for your agents to see the enhanced full case form when they create a new case. Additionally, if agents should see the enhanced case form when they access an existing case, set the enhanced case form as the default form.
        b. Select **Configure** to customize the form in Power Apps. The Power Apps form page opens on a new tab.
    - To enable the enhanced quick case form:
        a. Switch the **Quick case form** toggle to **Yes**.
        b. Select the option in the **Choose Form** dropdown. The selected main form appears as the side pane when the agent creates a new case. By default, this is set to **Enhanced quick case form**.
        c. Select **Configure** to customize the form in Power Apps. The Power Apps form page opens on a new tab.



> [!NOTE]
> - If the enhanced full case form has a higher form order than the default case form, agents might see the enhanced full case form even if you haven't enabled the enhanced case experience. If you'd like agents to see the default case experience, set the form order of the enhanced form lower than that of the default form. More information: **Set the form order**.
> - Agents can use the form selector to navigate from **Enhanced case form** to other forms. For agents to go back to the enhanced case form, ensure set the **ShowInFormSelector** is set to **True**.

View and use default components available on enhanced full case form

The following components are available out of the box in the enhanced full case form. You can use these components to customize other forms. When you add the components to a form, the runtime experience is as follows:



Legend	Component	Description	Entity	Additional actions	Additional information
1	**Associated Grid Control**	Displays the relevant records linked to the current record as subgrids. You can configure up to four subgrids using this component.	Available for all entities.	Not Applicable.	Configure components to display case associations
2	**Attachment Control**	Enables you to upload and display attachments.	You can add this control on a case form to upload attachments to a case and to display attachments uploaded directly,through email, notes, and conversations. For all other entities, add this component to display the attachments uploaded	For a case entity, set the **Table Column** in the component to **Pre Create Entity Attachment Id**.	Use Attachment Control to customize forms

Legend	Component	Description	Entity	Additional actions	Additional information
			through email and notes.		
3	**OptionSet Wrapper**	Displays the selected option set values as color-coded options on the form. For example, if you add **Priority** on a case, the application displays color-coded priority icons. If you add **Case Status**, color-coded status options are displayed.	Available for all entities.	Specify the required optionset in **Table Column**.	
4	**Queue Item Control**	Displays the current queue a record belongs to and the **Worked by** field. You can edit the **Worked by** and save the changes.	Available for queue enabled entities.	Specify a value in **Table Column**.	
5	**Due open activities control**	Displays the activities that are due today or are overdue.	Available for all entities.	**Table** must be set to **Activities**.	Use the Due open activities control to customize forms
	Notes Control	Allows you to take notes on a form before saving a record. The rich text editor tool is	Available for case entity only.	- Set the **Table Column** in the component to **Pre Create Notes Id**. - To configure advanced rich	

Legend	Component	Description	Entity	Additional actions	Additional information
		enabled by default.		text configurations, specify the **Rich text editor configuration URL**. More information: Create and use advanced configuration for the rich text editor control	

You can add these default components to other forms and customize them. More information: Add components to a form.

See also

Case management in multisession apps
Get started with Customer Service workspace

Use the attachment control to customize forms

Article • 05/03/2023

You can add the **Attachment Control** component to case forms so that agents can view and upload attachments. You can also add the component to other entity forms, such as Account or Contact, so that agents can view attachments uploaded through notes or emails.

> **Note**
>
> Agents can upload attachments directly only for cases and not on other entities.

Upload and view attachments on case forms

If you've enabled the enhanced full case form or added the **Attachment Control** component to other case forms, the following actions are applicable:

- When agents create a new case, and before the case is saved, they can upload attachments to the case.

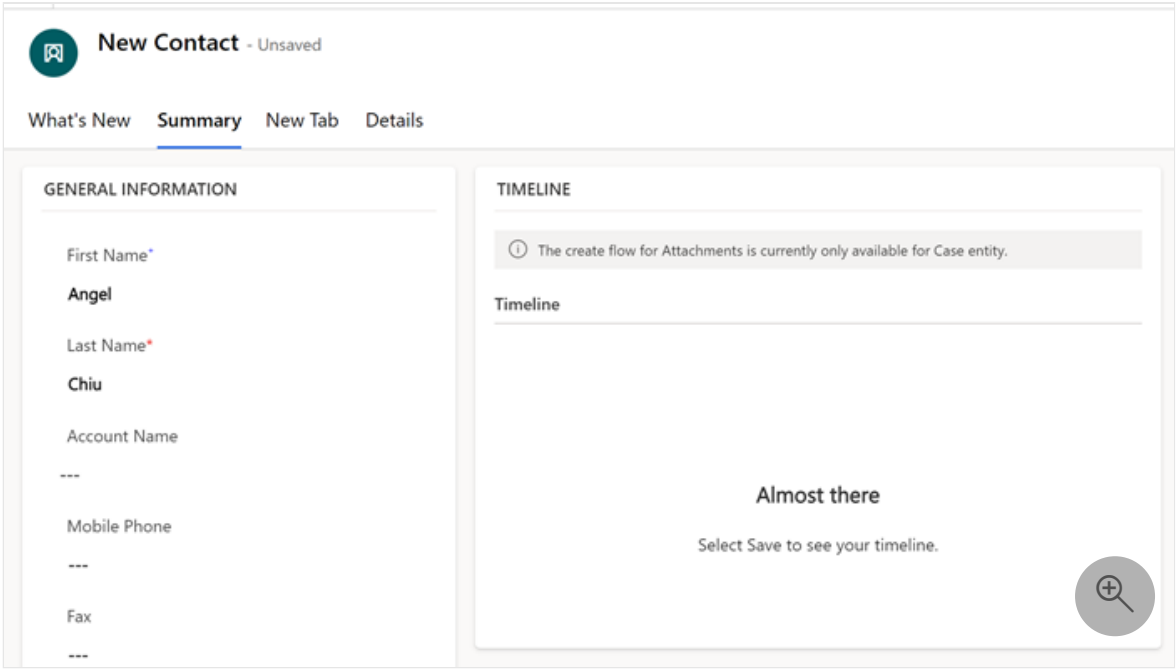
- After agents save a new case or if they open an existing case, the attachments grid is displayed. For more information on the actions agents can perform, see: View an existing case using enhanced Full case form.

If agents need to upload attachments, follow the steps in Create or edit a security role to manage access to grant permissions on the **Entity attachment** custom table to the applicable security role that's assigned to the agent.

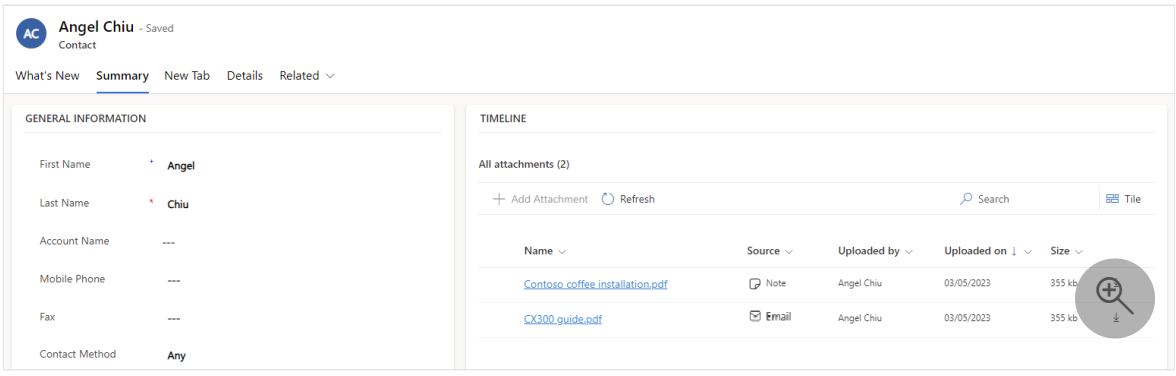
View attachments on other entity forms

When you add the **Attachment Control** component to other entity forms such as Account or Contact, agents can only view and download attachments that are uploaded through notes or email. They can't upload attachments directly to other entity records. The following actions are applicable:

- Agents can only view attachments for an entity record that's saved. When agents create a new entity record, before they save the record, attachments aren't displayed. The application displays the following message when agents create a new entity record, and haven't saved the record.



- After agents save a new record or open an existing record, the attachments grid is displayed as follows:



Customize forms with Attachment Control

On the required form, add the **Attachment Control** component. More information: Add components to a form. If you add the component to a case form, the following properties are available for further customization:

Property	Description
Table Column	For case forms, set this field to **Pre Create Entity Attachments Id**, for agents to be able to upload attachments to a new case, before they've saved it. For other entity forms this field can be set to any column, as attachments can't be uploaded directly to an entity record.
Show Control Title	Displays or hides the **Attachments** label, when a new case is created.
Show attachments from Conversation	Set this value to **Yes** or **No** to display or hide the attachments that were shared through conversations such as live chat and asynchronous messaging conversations.
Show attachments directly uploaded to entity	Set this value to **Yes** or **No** to display or hide the attachments that were directly uploaded when the case was created.
Show attachments from email	Set this value to **Yes** or **No** to display or hide the attachments sent through email, for any entity.
Show attachments from notes	Set this value to **Yes** or **No** to display or hide the attachments that were added to notes on the timeline, for any entity.

See also

Case management in multisession apps
Get started with Customer Service workspace

Use the Due open activities control to customize forms

Article • 05/03/2023

The **Due open activities control** helps agents see the activities that are either due today or overdue. The application displays the due or overdue activities as a hyperlink. This component is available out of the box on the enhanced full case form.

Customize forms with Due open activities control

You can customize other forms such as Account or Contacts, to display the due or overdue activities by performing the following steps:

1. In Power Apps, add the **Due open activities control** component to the required form. More information: Add components to a form.
2. On the **Due and Overdue Activities** subgrid, in **Properties** specify the following:

    - In **Table** select **Activities**.
    - Select the **Show related records** to display the activities related to the current record only.

3. Save and publish the customizations.

Specify tab to redirect users to view open activities

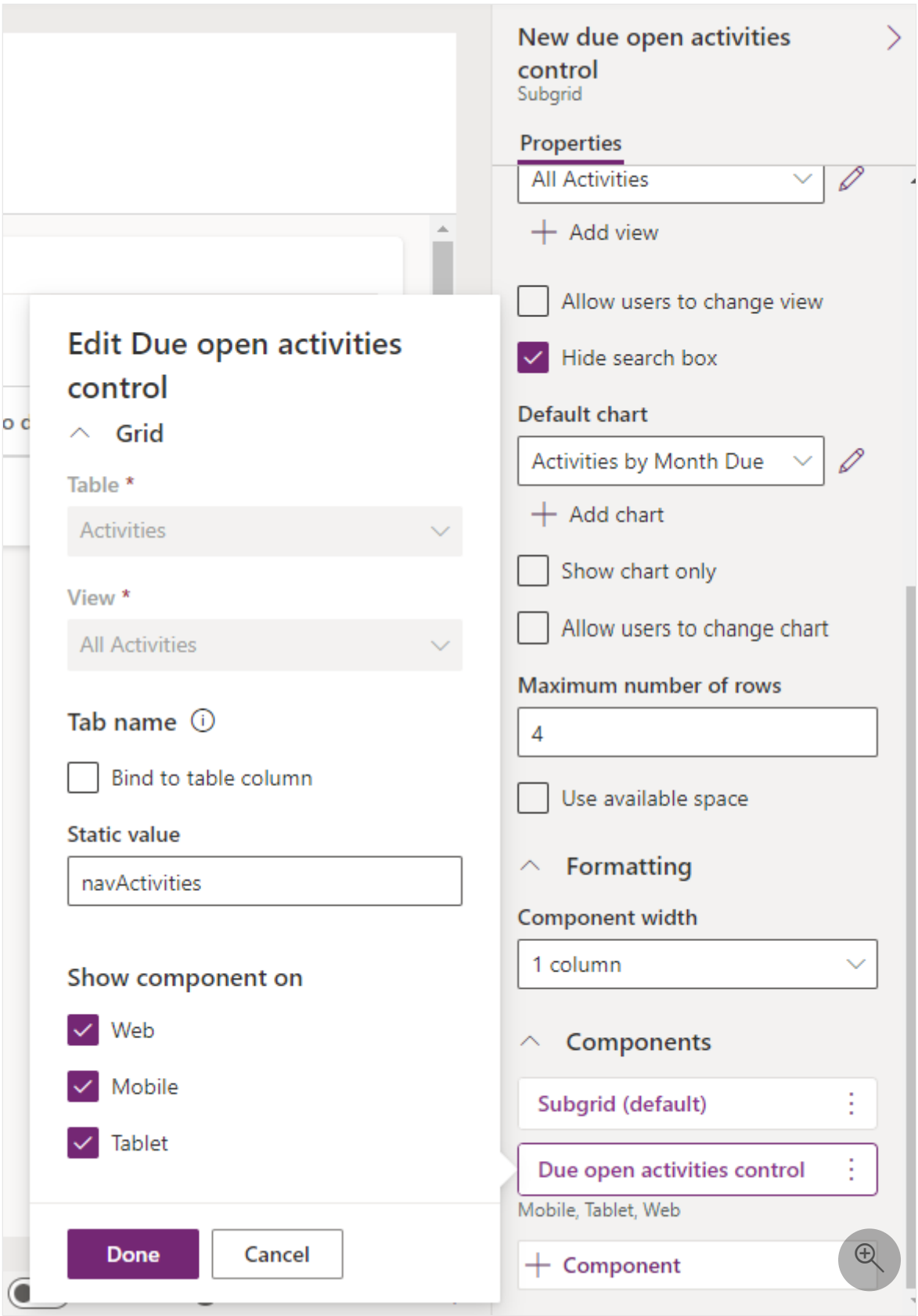
Configure the tab that the agents must be redirected to when they select the open activities link from the **Due open activities control**. You can set this at an environment level or for a specific app.

1. In Power Apps, add the **Due open activities control** component to the required form.

2. In **Edit Due open activities control**, set the **Static value** option to the required tab. To find the tab's name, perform the following steps:

    - Navigate to a form that has the required tab.
    - Select the tab, and then copy the value in **Name** in **Display options**.

3. Save and publish the customizations.



See also

Add components to a form. Case management in multisession apps

Get started with Customer Service workspace

Work with cases

Article • 01/14/2022

Track your cases efficiently and act on them quickly in the Customer Service Hub application.

Creating and managing a case can't be any simpler. With the intuitive case form in the Customer Service Hub, you can do all your important tasks and actions without navigating to different parts of the application.

You can capture important information about customers, interactions you've had with them, and all related records of the current case in once single place.

Watch this video to learn more about case management in the Customer Service Hub: https://www.microsoft.com/en-us/videoplayer/embed/cde80c83-f592-4b15-b1a1-4fae13be93f9?postJsllMsg=true

Create a case

You can create a case in Customer Service workspace or Customer Service Hub.

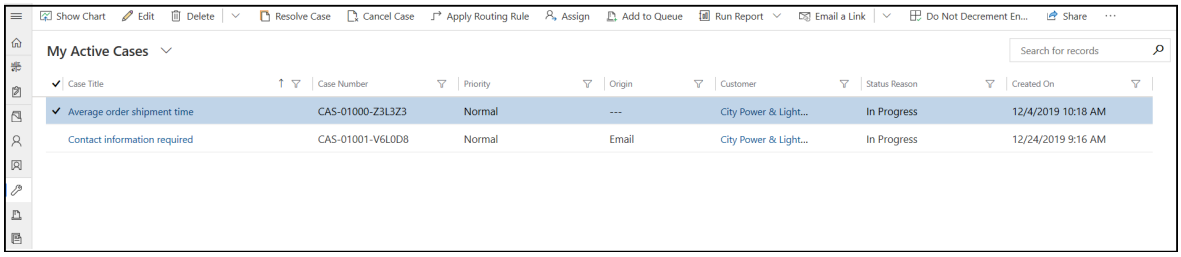
1. Make sure that you have the Customer Service Manager or Customer Service Representative role, or equivalent permissions.

2. In Customer Service workspace, go to the **Customer Service Agent Dashboard**. If you are using Customer Service Hub, in the site map, go to **Service** > **Cases**.

   - The **My Active Cases** view is displayed. You can switch between the different case views by selecting the current view.
   - Select **Show Chart** on the command bar to see the chart view.
   - Select **Open Dashboards** on the command bar to directly open the entity dashboard. To switch back to views, select **Open Views**.

   If you select a case record from the case view, you see these additional options on the command bar:

   - Select **Apply Routing Rule** to apply a routing rule on a selected case.
   - Select **Assign** to assign a case to another owner.
   - Select **Add to Queue** to add a case to a queue.



3. On the command bar, select **New Case**. Alternatively, you can quickly create a new case by selecting in the nav bar and selecting **Case**. This opens a vertical flyout towards the right side of the screen.

   View and update the **Priority**, **Status**, and **Owner** of the case. The **Created On** date is picked up as soon as you save the case.

4. Go to **Summary** and in the **Case Title** field, type a descriptive title to identify the case.

5. In the **Subject** field, select a subject. When you associate cases with subjects, you can search for cases with similar issues and find related articles. If you don't see the subject that you want in the list, ask your administrator to add it.

6. Find the customer:

   a. Select the **Customer** lookup button. By default, this field shows all customer records, accounts, and contact records. Or, type a few letters and select **Enter** to search for records that contain the letters. After you select an existing customer, the **General Information** section will show the contact card for the customer, along with recent cases in the Related section.

   b. If a customer record doesn’t exist, you can a add new customer record using the entity tab.

7. In the **Origin** field, select the channel through which this case was initiated.

8. In the **Product** field, select the product this case is for. You can’t select a product family, a draft product, or a draft product bundle.

9. To see what kind of support you should provide the customer, select the **Entitlements** lookup button and select an active entitlement. The **Entitlements** section in the case record lists all the active entitlements for the customer.

> **ⓘ Important**
>
> If an SLA is associated with an entitlement and the same entitlement is applied to a case, then the associated SLA becomes applicable for the case.

> ⓘ Note
>
> - When a case is created and an entitlement is applied to it (or when the case gets resolved), the entitlement terms from the associated entitlement are decremented. However, if you don't want the entitlement terms to be decremented for a case, on the command bar select **Do not decrement entitlement terms**.
> - When you update the **Customer** field, the value of the **Entitlements** field will be cleared.

10. Select in the **Description** field to enter to add a detailed description about the case.

11. Navigate to other tabs to provide or view more information about the case.

    - The **Details** tab tracks **Case Details**, **Additional Details**, **Social Details**, **Description**, and **Applicable SLA** of the case.

    - The **Case Relationships** tab shows a **Merged Cases** and **Child Cases** list. You can add an existing child case to the current case from the **Child Cases** list. If you want to create a new child case for the current case, select **Create Child Case** on the command bar.

      The **Case Relationships** tab also shows a list of knowledge articles associated with the case, in the Associated Knowledge Records sub-grid.

    - The **SLA** tab shows the related SLA KPI instance records for each SLA KPI that's tracked for the case.

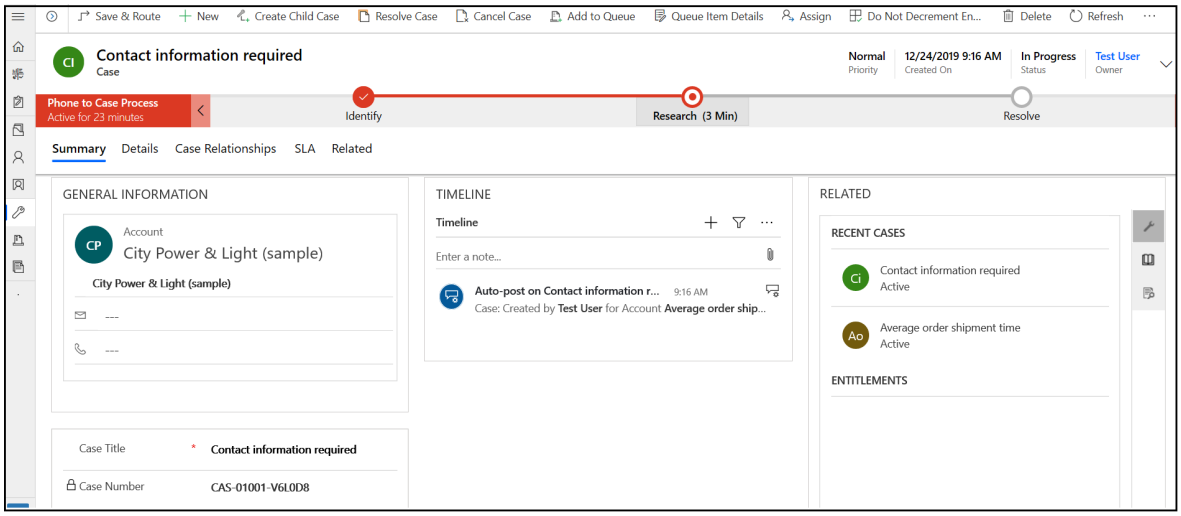
      > ⓘ Note
      >
      > By default, a timer for enhanced SLA is already added to your case form. If an enhanced SLA applies to the case you're working on, you will see a timer that shows the countdown to meet the SLA KPIs.

    - The **Related** tab shows the common associated entities like **Knowledge Base Records**, **Activities**, **Connections**, and **Work Orders**.

      Select on any one of the common associated entities and they open in a new tab, aligned horizontally.

12. When you're done, select **Save**.

    - After you save the case, the Timeline section appears and displays the post about case creation.
    - The Business Process flow bar appears and displays the process stages to guide your case towards completion. For more information, see **Business processes**.
    - On the command bar:
        - Select **Save and Route** to route the case by applying routing rules
        - Select **Create Child Case** to create a child case
        - Select **...** on the command bar to explore more options for the case.



> **Note**
>
> If you have previously installed any portal solution, to create a case in the Customer Service Hub or to use the Merge cases command, you must turn off the **Read-only in mobile** option for the Case entity. More information: **Turn off Read-only in mobile option**.

See also

Learn the basics of the Customer Service Hub
Use the Main form and its components

Use enhanced case forms to manage cases

Article • 04/05/2023

The enhanced case management experience in Customer Service workspace allows agents to verify and edit customer details without switching tabs, add updates to existing cases without interrupting the case creation flow, and avoids case duplication.

Create cases using quick create from

You can use a quick create form to create a new case from within a form without navigating to a different page.

For example, if you select **New Case** in the **Customer Service Agent Dashboard**, a quick create form for a new case appears as a flyout.

Depending on the settings enabled for you, you'll see the **Enhanced Quick case** form or **Default Quick case form: case** that are explained as follows:

Enhanced Quick case form

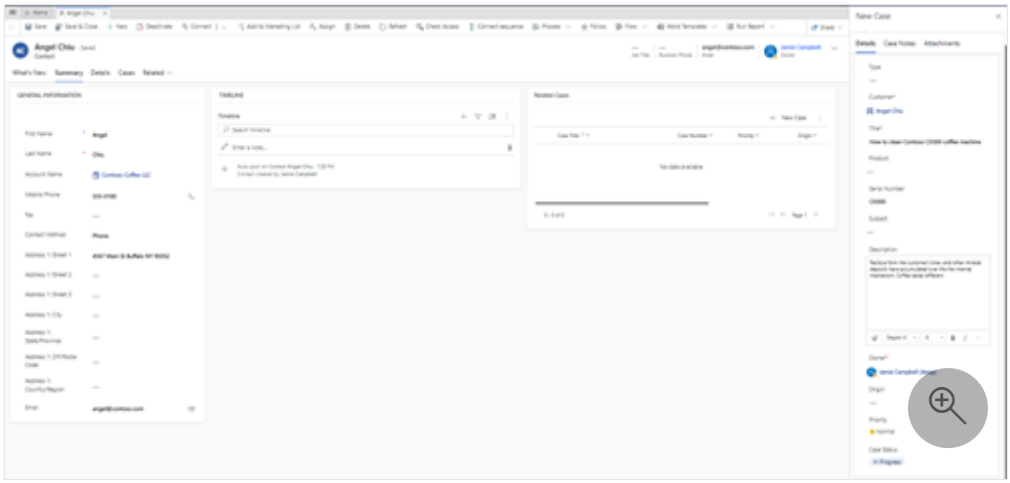
A few scenarios where the enhanced quick case form appears is when you select **New Case** in the following:

- Customer Service Agent Dashboard.
- AI-generated summary of a customer conversation.
- contact or account form
- Active conversation form
- **Child cases** subgrid on an existing case.

You can perform the following actions when the quick case form is open:

- Access, copy, or edit the information in the background form or view. You can also paste information from the background to the case form.
- On **New Case**, you can specify data in the following tabs:
  - **Details**:
    - Required fields such as **Customer** and **Title** of the case.
    - **Description**: Add information related to the case. The rich text editor toolbar helps you format text, add images and links to this field. You can also drag and drop files on to the description section.

    - Color coded **Case Status** fields and **Priority** icons.
  - **Case notes**: You can add relevant information such as the steps tried to resolve the issue or important details that have to be included as notes without having to save the case. The rich text editor toolbar helps you format text, add images and links in this field. You can use either the attachment icon to upload attachments or drag and drop files.
  - **Attachments**: Select **Add Attachment** to upload multiple attachments at once.
- If you'd like to provide additional information, you can switch to the main case form. All the details you've added to the case are added automatically when you switch to the main form.



Create a case from the main case form

You can create a new case from the main case form. Depending on whether your administrator has enabled the enhanced **Full case form** in **Customer Service admin center**, you'll see one of the following layouts.

Depending on the settings enabled for you, you'll see the **Enhanced full case form** form or **Default main case form: case** that are explained as follows:

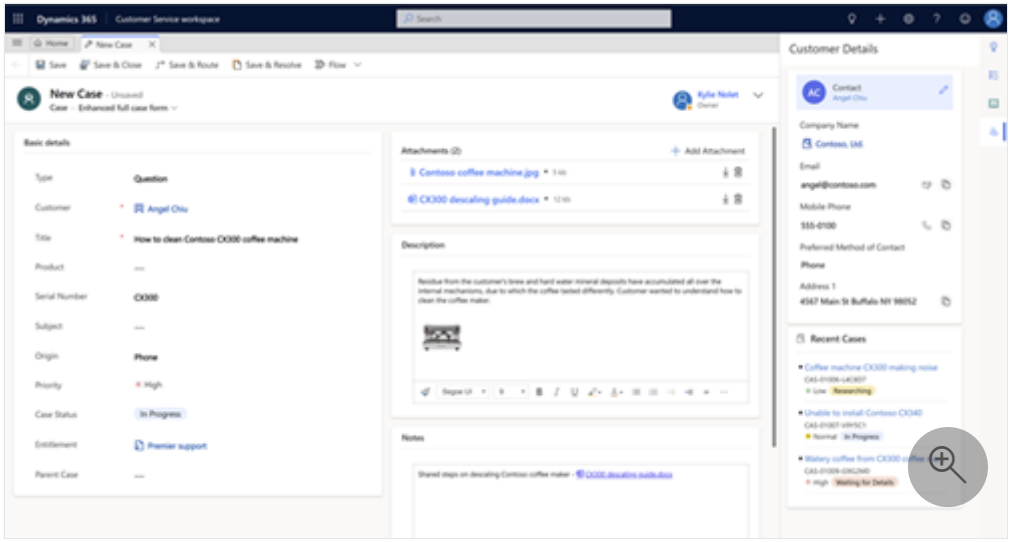
Enhanced full case form

On the enhanced full case form, you can perform the following actions:

- Specify the customer to display the relevant customer details and recent cases on **Customer Card** and **Recent cases**.
- Use **Case Notes** and **Description** to record notes and information related to the case. The rich text editor toolbar helps you format text, add images and

links to these field. You can also drag and drop files on to the description section.

- **Attachments**: Select + **Add Attachment** to upload multiple attachments at once.
- View color coded **Case Status** fields and **Priority** icons.
- **Save and Resolve**: The form has an additional option to save the case and initiate the case resolution process.



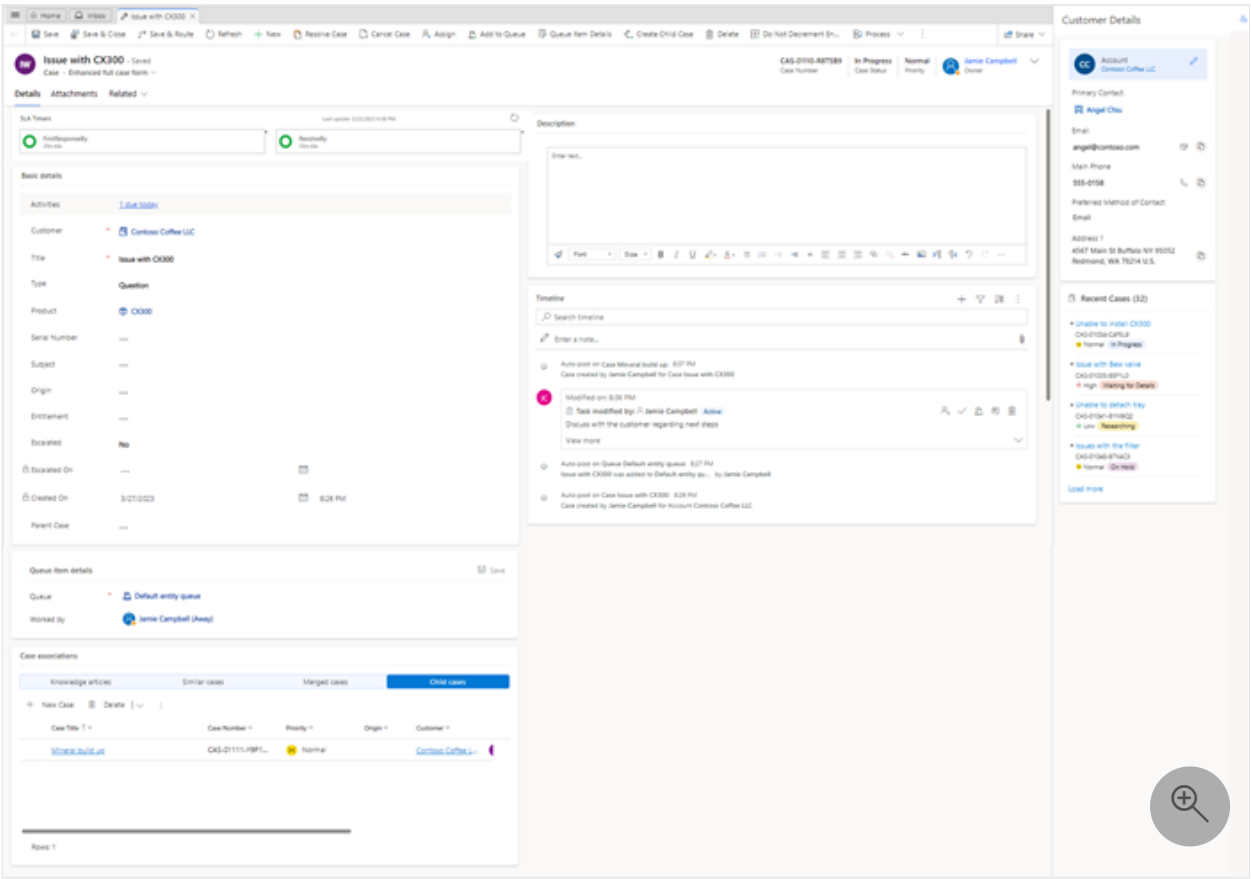
View an existing case using enhanced Full case form

If you save the case using the enhanced full case form, you'll see the following:

- An SLA timer that displays the time within which the agents must first respond to a customer and the time by which they must resolve the case.
- Links with the activities associated to the case that are either due that day or past their due date. You can select the link to view the open activities associated with the case on a tab your administrator has configured. By default, it displays open activities in the Activities tab. More information: Specify tab to redirect users to view the open activities for a case
- Related customer and recent case information on the **Customer details** side panel.
- The **Queue item details** displays the current queue the case belongs to and the **Worked by** field.
- View details of the relevant records associated to a case on **Case associations**.
- Timeline to view information related to the events that happened on the case.
- Upload and view attachments linked to the case on the **Attachment** tab. You can also:

- See the source of the attachment such as direct upload, attachments uploaded through notes, email, or shared through conversation and the user who uploaded the attachments.
- Use the dropdown list to switch between grid and tile views.
- Search for attachments
- Sort and filter attachments based on **Name**, **Size**, **Uploaded on**, **Uploaded by**, and **Source**.
- Select the attachment to preview the content of the attachment. This is only supported for pdf and image files.
- Download and delete multiple attachments at once.

> **Note**
>
> - You can delete only those attachments that have **Source** set to **Direct Upload**.
> - Attachments shared over a conversation will be displayed only if a case is linked to the conversation and the conversation has ended. The **Uploaded By** is set to **Omnichannel User** and **Uploaded on** is the time when the conversation ended.
> - You'll see the enhanced full case form when you open an existing case only if your administrator has set enhanced **Full case form** as the default form.



View customer details and recent cases

When you create a new case and specify a customer or an account, or open a case after saving it, the application displays the following details, based on your administrator's configurations:

- **Customer Details**: Displays the customer details configured by your administrator. You can edit the information inline, copy the information and initiate activities such as email or phone call. The activities open as a new quick create form on the main page.
- **Recent Cases**: Displays the recent cases linked to customer or account. More information: Configure components to display customer details and recent records.

See also

Enable enhanced case forms for multisession apps
Get started with Customer Service workspace
View Active conversation to get available information about customers

Resolve, cancel, and reassign cases

Article • 04/27/2023

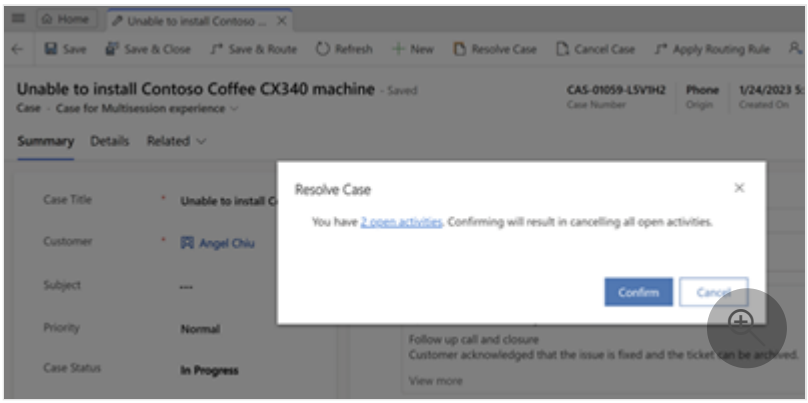
Customer Service provides you with the ability to resolve, cancel, and reassign cases.

Resolve a case

1. In the list of active cases, open the one you want to resolve.
2. On the command bar, select **Resolve case**. The status of the case is set to **Resolved** only when you select **Resolve Case** and the case gets resolved. You can't set the value of the **Case Status** field to **Resolved**

If you have open activities linked to the case, you'll see a message with the following actions:

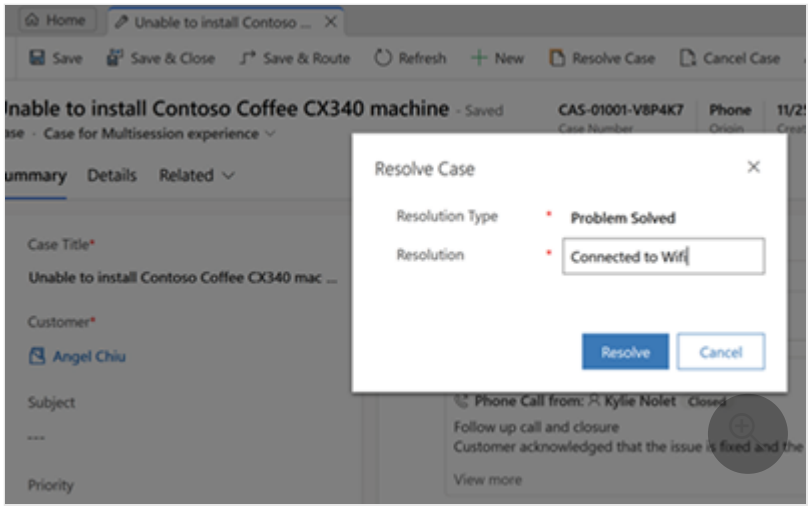
- A link with the number of open activities. You can select the link to view the open activities associated with the case on a tab your administrator has configured. More information: Enable the redirection link for Customer Service apps
- **Confirm**: If you select **Confirm** on the warning, the system automatically cancels the open activities when the case is resolved.



3. Depending on the settings enabled for you, you'll see the minimal case resolution dialog or legacy case resolution dialog that are explained as follows:

Default case resolution dialog

By default, you will see the **Resolution Type** and **Resolution** fields only on the **Resolve Case** dialog.



6. Select **Resolve**.

> ⓘ Note
>
> - We recommend that you resolve or close a case before deleting it.
> - While you can't edit or update through the UI any attribute of the case after it is resolved, you can configure an API or a Power Automate flow to be run if the setting in service configuration is enabled. More information: **Allow updates for resolved and canceled cases**
> - The "resolve cases" action is not available in the business process flow in Customer Service Hub. As a workaround, you can customize the business process flow to add the action. For information about customizing the business process flow, see **Add an action to a business process flow**.

Resolve a case with a parent and child relationship

> ⓘ Important
>
> Sometimes, resolving a case action might be blocked based on your current case status. This is because your admin may have set things up so that you only see a limited set of statuses to choose from based on the current status of a case. For more information about the available list of case statuses, contact your administrator.

Depending on your settings, a case with a parent and child relationship can be closed in one of the following ways:

- When all the child cases are resolved, you can then close the parent case.
- When you resolve the parent case, it will then resolve all the active associated child cases.
- A parent and child case can be closed independently of each other. This is the default setting.
- Before you resolve a parent case that has active child cases, make sure that all the case activities are closed. Otherwise, you'll get a message with the following actions:
  - A link with the number of open activities. You can select the link to view the open activities associated with the case on a tab your administrator has configured. More information: Enable the redirection link for Customer Service apps
  - **Confirm**: If you select **Confirm** on the warning, the system will automatically cancel the open activities when the case is resolved. Also, performance may be slow when you close a parent case with lots of active child cases associated with it.

Cancel a case

All case activities must be closed before you can cancel a case.

1. In the list of active cases, open the case you want to cancel, and then on the command bar, select **Cancel Case**.
2. In the **Confirm Cancellation** dialog box, select the case status:
   - **Canceled**: This means the case is canceled and it will no longer be assigned to you.
   - **Merged**: This means the case is merged with another case. When the case is merged, the case activities will be moved to the case it was merged with.
3. Select **Confirm**.

> **Note**
>
> If you are using a custom code or custom workflow to mark a case resolved or canceled, ensure that you set up appropriate validation to check if the case is

already resolved or canceled. If a custom workflow tries to resolve or cancel a case that is already resolved or canceled, you will see errors while executing the custom workflow.

Reassign a case

If you don't have enough information to resolve a case, or if you think another member in your team has expertise on the subject, you can assign the case to another user or team.

1. In the list of cases, select the case that you want to reassign, and on the command bar, select **Assign**.
2. In the **Assign to Team or User** dialog box, in the **Assign To** field, select **User or Team**, and then in the **User or team** field, select who you want to assign the case to.
3. Select **Assign**.

Case resolution history

Located on the right side of the form, is the case resolution sub-grid. Here you will find the case resolution history. Should a case need to be reopened, agents have the ability to view case history here.

See also

Learn the basics of the Customer Service Hub

Use the Main form and its components

Merge cases

Article • 05/31/2023

When a customer opens multiple cases about the same issue through different support channels or when multiple customers from the same account call in about the same issue, you can merge those cases into one case to eliminate redundancy.

When a case is merged, the state of the case is changed to canceled, and the status is changed to merged. This is because it is merged into another case and all of the case activities, emails, and attachments are now associated with the case it was merged into. By default you can merge up to 10 cases at a time.

A few things to remember when you merge cases with parent and child relationships:

- When you merge a case that has child cases, those child cases become child cases of the parent case they were merged into.
- You can only merge a child case into another child case if both of the child cases have the same parent case.

In the Customer Service Hub, you can merge cases from the dashboard streams or from the list of case records.

> ⓘ **Note**
>
> The **Merge Cases** dialog box uses the Merge Incident view of the Advanced Find view that can't be customized.

Merge cases from dashboard streams

1. In Customer Service Hub, select **Dashboards** in the site map.
2. Open the dashboard you want to look at.
3. Select at least two active case records that you want to merge using the **Bulk select** button .
4. Select the **More Actions** button , and then select **Merge Cases**.
5. In the **Merge Cases** dialog box, from the list of cases, select the case the other cases will be merged into, and then select **Merge**.

6. To see the merged case, open the case it was merged into. You'll find the merged case listed in the **Merged Cases** section on the **Case Relationships** tab.

Merge cases from a list of case records

1. In Customer Service Hub, select **Cases** in the site map. In Customer Service workspace, select the **My Active Cases** view on the **Customer Service Agent Dashboard**.

2. Select at least two active case records that you want to merge, and then on the command bar, select **Merge Cases**.

3. In the **Merge Cases** dialog, from the list of cases, select the case the other cases will be merged into, and then select **Merge**.

4. To see the merged case, open the case it was merged into. You'll find the merged case listed in the **Merged Cases** section on the **Case Relationships** tab.

See also

Learn the basics of the Customer Service Hub
Use the Main form and its components

Manage cases with case grids

Article • 07/03/2023

The modernized case grids help you increase your productivity by providing quick access to information, such as last customer interaction, case age, and the next SLA breach. You can perform inline edits and quick operations with minimal clicks, thereby managing cases quickly and efficiently. More information: Key features

Columns on the Enhanced Active Cases view

To be able to view the modernized case grids, your administrator must enable the **Enhanced Active Cases** view. More information: Enable case grids

> **Note**
>
> Enabling the **Enhanced Active Cases** view will alter the **modifiedon** and **modifiedby** fields on the case entity. We recommend that you avoid using these fields for reporting.

The following table explains the enhancements to the **Enhanced Active Cases** view columns when you enable the **Power Apps grid control**, compared with other grids, such as the **Read Only Grid**.

Column	Experience with Power Apps grid control	Experience with other grids
Origin	Shows the Origin Icon followed by the text for all the views on Case Grid. The Origin column is editable on double-click. You can sort and filter the data.	Only the text appears, without any icons.
Priority	Shows the color-coded Priority icon followed by the text for all the views on Case Grid. The Priority column is editable on double-click. You can sort and filter the data. **Note**: The colors displayed for the **Priority** and **Case status** fields have changed as an early access feature.	Only the text appears, without any icons.

Column	Experience with Power Apps grid control	Experience with other grids
Owner	Shows the profile image of the Owner, if available; otherwise shows the initials followed by the Owner name as text. The Owner column is editable on double-click. You can sort and filter the data.	Only the owner's name appears without any profile image or initials.
Last Interaction	Shows the last activity and the action performed on that activity—for example, **Note Added** for standard activities. For custom activities, only the created or updated status is shown. Selecting it opens the corresponding activity's form. This data is read-only. You can't sort or filter the data. Additionally, if the activity has an attachment, you can see an attachment icon next to the activity. Displaying the Last Interaction column doesn't affect the **modifiedon** and **modifiedby** fields.	No text appears.
Next SLA	Searches through all active, that is, non-canceled SLA KPI instances attached to the given case, filters, and then picks the SLA KPI instance that's in an unresolved state and has the earliest expiry time. If the expiry time is in the past, it indicates that there's an expired SLA instance associated with the case. The SLA KPI instance name isn't shown along with the timer control. The unsupported properties of the SLA timer control are negative timer, customized labels, upgrade frequency, and auto-refresh. The Next SLA column is read-only. You can sort the data but can't filter it. Calculating Next SLA for cases results in updates to the **modifiedon** and **modifiedby** fields on the case entity. If you want to disable Next SLA, you must contact Microsoft Support.	The SLA timer doesn't appear. Only the value assigned to **Next SLA** field in the back end appears, which includes details such as name of SLA instance and expiry/warning time.
Subject	Shows the subject associated with the case. You can edit the Subject column by double-clicking it. All the available options that you can select are listed. A hierarchical view isn't available. You can sort and filter the data.	The subject associated with the case appears as a text.
Is Escalated	Shows a toggle button reflecting whether the case has been escalated. The Is Escalated column is editable. You can sort and filter the data.	Escalation information in the form of **Yes/No** appears as text.

Column	Experience with Power Apps grid control	Experience with other grids
Case Age	Shows the static text with the duration for which the case has been active for active and resolved cases in the format {xx}d {yy}h or {xx}h {yy}m. For canceled cases, the column shows **Canceled**. For cases that were in the **Resolved** state before enabling modernized case grids, the column shows as **Resolved**. Calculated Case Age is refreshed every minute, but you must refresh the view to see the updated case age on the grid. The column shows **0h 0m** when a case is created, after which the column shows either **{xx}h {yy}m** or **{xx}d {yy}h**. This column is read-only. You can't sort or filter the data. To calculate case age for cases that are resolved after enabling modernized case grids, the **deactivatedon** attribute captures the date and time, when a case is resolved. Case age for resolved cases depends on the values of the **createdon** and **deactivatedon** attributes. Calculating case age for active or resolved cases won't affect the **modifiedon** and **modifiedby** fields.	Duration in minutes (whole number) for active and resolved cases appears. For canceled cases, **Canceled** appears.

Customize the Case grid

Depending on the information that you want to view, you can choose to add columns to the case grid and you can change the existing case grid views.

Add columns to the Case grid

Adding columns to the new **Enhanced Active Cases** view directly isn't supported. However, you can create a copy of the existing view and customize it.

To create a copy of the **Enhanced Active Cases** view and customize it to add a new column:

1. In the Customer Service workspace site map, open a new tab, and then select **Cases**.
2. From the dropdown list, select **Enhanced Active Cases** .
3. Select **Switch to classic**.
4. Enter a new name for the view. This saves it as a copy of the **Enhanced Active Cases** view.
5. From the list of views available for **Cases**, select the new view that you created.
6. Select **Column Options**.

7. In the **Edit columns** dialog, select **Add columns**. The Add columns dialog appears.
8. In the **Add columns** dialog, within **Case**, search for the column that you want to add.
9. Select the column, and then select **Close**. The new column that you have added appears in the **Edit columns** dialog.
10. Select **Apply**. If you want to change the sequence of the columns, select **Move up**, and then select **Apply**.

Make changes to existing case grid views

You can also add columns to your existing views. For example, if you want to add **Last Interaction** or any of the other new key data columns, perform the following steps:

1. In the Customer Service workspace site map, open a new tab, and then select **Cases**.
2. From the dropdown list, select any of the existing views.
3. Select **Column Options**.
4. In the **Edit columns** dialog, select **Add columns**. The **Add columns** dialog appears.
5. In the **Add columns** dialog, within Case, select **Custom** from the dropdown list.
6. Select **Last Interaction**, and then select **Close**. **Last Interaction** appears in the **Edit columns** dialog.
7. Select **Apply**. If you want to change the sequence of the columns, select **Move up**, and then select **Apply**.

See also

Enable case grids Enable entities for service-level agreements
Troubleshoot issues in SLAs

View a social profile in social care sample application

Article • 05/23/2022

Track the high influencers and the customers for your business, and save them as contacts in Dynamics 365 Customer Service with their social profile information. You may want to get in touch with these resources later for marketing or brand-building purposes.

With the social care sample application, you can create a social profile and a corresponding contact automatically every time you create a case. You can also create social profiles for the authors of the posts who have a large number of followers or likes. These social profiles can be viewed in the **Services** area. If a social profile exists for the author of the post, a new profile is not created.

Every social profile has a corresponding contact in Dynamics 365 Customer Service. A contact can have several social profiles, but a social profile can't have several contacts.

> **Note**
>
> The social profile data in the application is read-only. You can only view, define a workflow, or change the owner of the record.

View a social profile

1. Go to **Service** > **Social Profiles**.

   The list of social profiles that are created in the application appears.

2. Double-click any social profile to see the complete details.

   The social profile form shows the name, profile link of the contact, and the cases associated with this social profile. You can also view the influencer score if it is included as part of the social feed.

See also

Sample application using Microsoft Dynamics CRM Social Care Framework

Convert a case to a Knowledge article

Article • 12/14/2022

There are times when existing knowledge articles don't contain relevant information for resolving a case. You, as an agent, can now contribute to the knowledge base by turning all information that's been researched for a case into a knowledge article. You can convert one case into multiple knowledge articles.

1. Make sure you have Create permissions on the Knowledge Article entity.
2. In the list of active cases, open the one that has the information that you want to convert to a knowledge article.
3. On the command bar, select the ellipsis **(...)** and go to **Convert To** > **To Knowledge Article**.

   The **Convert to Knowledge Article** dialog box opens. The title, owner, and subject of the article are populated based on the title, owner, and subject of the case. The content of the article is automatically populated with the description of the case. If the case is resolved, the content field shows the case description, case resolution, and case resolution description.
4. If you want to open the newly-created article, select the **Open the new knowledge article** field to set it to **Yes**, and then select **Convert**. Otherwise, set it to **No**.
5. If you set **Open the new knowledge article** to **Yes**, a knowledge article form opens. Fill in the necessary information for the knowledge article, and then select the **Save** button. More information: Create and manage knowledge articles

The knowledge article is created regardless of whether you set **Open the new knowledge article** to **Yes** or **No**.

See also

Learn the basics of the Customer Service Hub

Use the Main form and its components

View AI-suggested similar cases and knowledge articles

Article • 08/01/2022

When you open an active case, you can view suggestions about similar cases that were previously resolved successfully and knowledge articles. With the use of AI, these features help you find the right solutions and provide better and faster service to customers. To understand how AI-suggestions work, see How AI suggestions for similar cases and knowledge articles work.

The AI suggestions are displayed in smart assist, an intelligent assistant that provides real-time recommendations to you, helping you take actions on active cases or during your interactions with customers in ongoing conversations. If similar cases and knowledge articles aren't displayed, your Administrator would've disabled the AI-suggestions for similar cases and knowledge articles features.

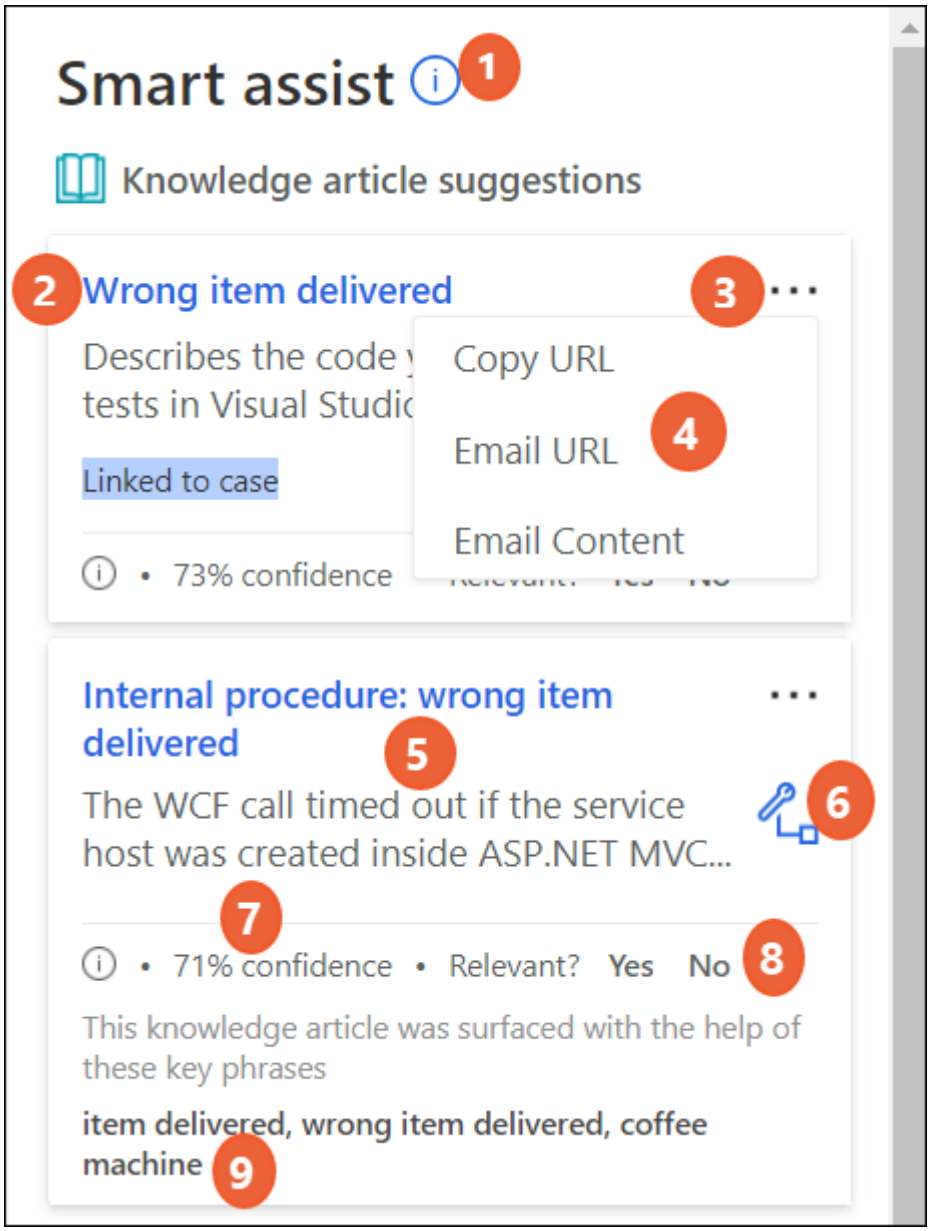
> **Important**
>
> The **Smart assist** pane is displayed only when you open the case in a new session tab. If you open to view a resolved case in an app tab when your in-progress case is open, smart assist will not be refreshed for the resolved case.

Prerequisites

- AI-suggestions for similar cases and knowledge articles should be enabled. This feature is enabled out of the box.
- Smart assist feature must be enabled by your administrator. More information: Smart assist in Customer Service Workspace
- The Productivity tools user role must be assigned to you.

Understand the knowledge article components in smart assist

When you open an active case to work on it, up to three top knowledge articles that match the case context are displayed in the **Smart assist** pane.



The following table lists the explanation of the smart assist card for AI-suggested knowledge articles.

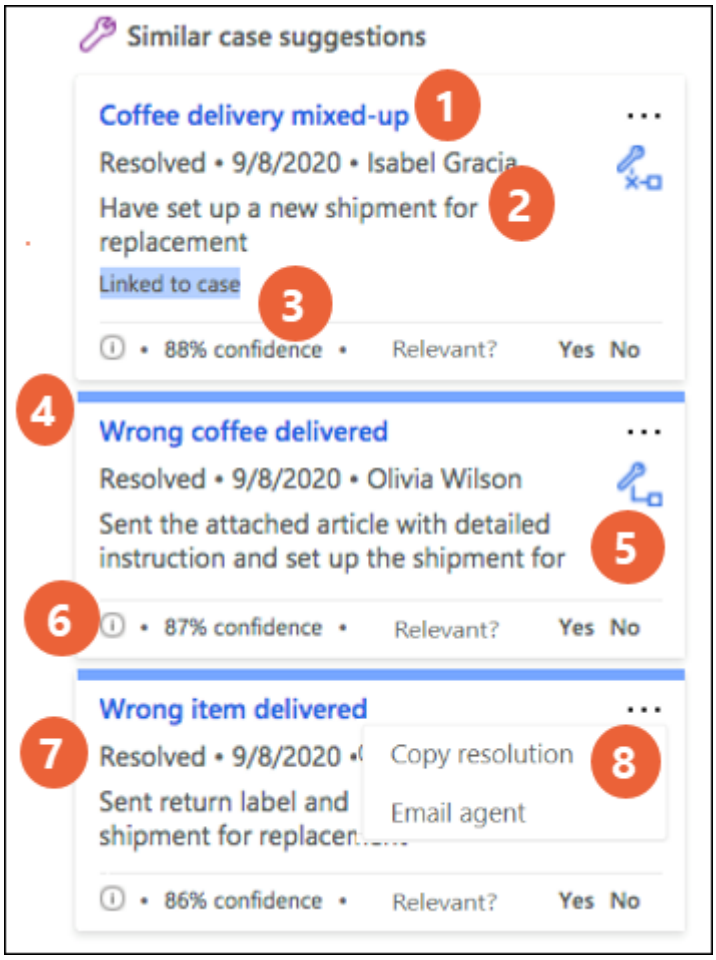
Label	Description
1	Displays the information about the cards when selected.
2	Title of the related knowledge article.
3	More commands
4	Displays the actions that can be performed when you select more commands.
5	A brief summary of the knowledge article that is generated by the AI model.
6	Option to link the article with the case as a related article.

Label	Description
7	Displays the confidence score based on which the knowledge article was selected by the AI model. Usually, the suggested knowledge articles are highly relevant to the context of conversations when the confidence score is above 80%; suggestions with lower confidence score may still be relevant based on the semantic meaning of some key words in the conversation. The minimum confidence score is 65%.
8	When user selects **Yes**, the label is highlighted and the card remains on the pane. If user selects **No**, the card is replaced with a new suggestion, if it exists. This feedback from agents is used by the AI model to retrain and improve the suggestions over time.
9	Displays information on the keywords that were used by the AI model to match the article.

If no knowledge articles match, then the card displays an appropriate message, such as "No suggestions found for knowledge article."

Understand the similar cases components in smart assist

When you open an active case to work on it, up to top three resolved cases that you have access to are suggested by the AI model and displayed in the **Smart assist** pane. By default, the suggestions are made based on case title and description. Your administrator may change the settings to use other text fields for the AI model to get the case context.



The following table lists the explanation of the smart assist card for AI-suggested similar cases.

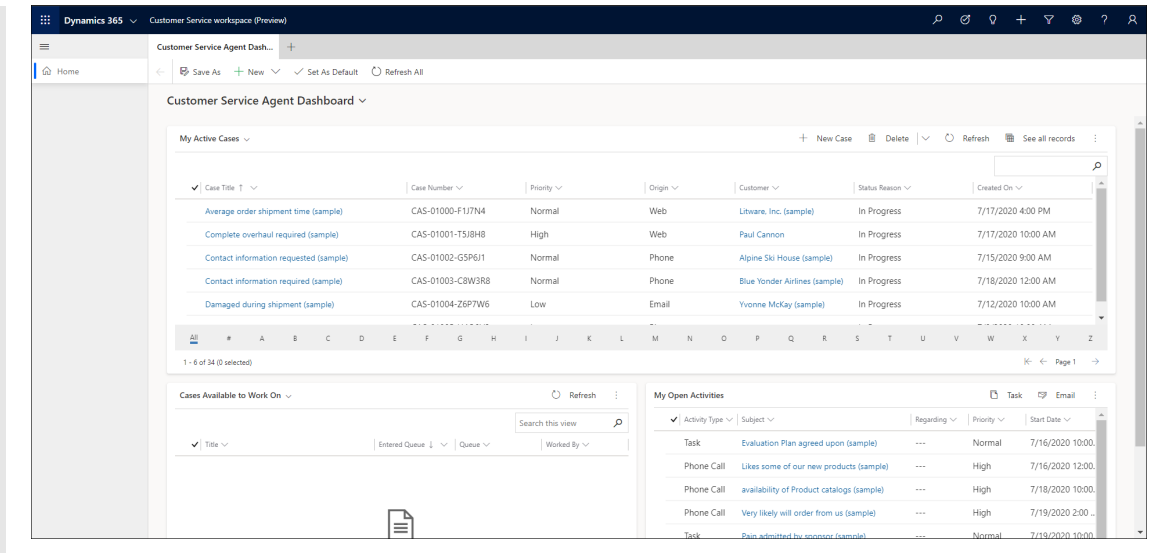
Label	Description
1	The title of the similar case.
2	Summary of the case resolution that is generated by the AI model.
3	Displays the confidence score based on which the knowledge article was selected by the AI model. Usually, the suggested cases are highly relevant to the context of cases when the confidence score is above 80%; suggestions with lower confidence score may still be relevant based on the semantic meaning of some key words in the cases. The minimum confidence score is 65%.
4	Blue bar indicates that the user hasn't interacted with the card yet.
5	When selected, links to the current active case or removes the link to the similar case.
6	When selected, displays information on the keywords that were used by the AI model to match the article.
7	Status of the similar case.
8	Displays the actions that can be performed when you select more commands.

If no cases match, then the card displays an appropriate message, such as "No suggestions found for similar cases."

View AI-suggested similar cases and related knowledge articles

Perform the following steps to view the similar cases and related articles for the case you are working on. The actions that you can perform with the options available in the suggestions are determined by the role assigned to you.

1. In Dynamics 365, select Customer Service Workspace. The **Customer Service Agent Dashboard** page appears.



2. In the **My Active Cases** list, select shift+mouse click the case you want to work on. The case opens in a session tab, and the **Smart assist** pane appears on the right. The Smart assist pane lists the top three knowledge articles and five similar cases suggested by AI based on the case context.

3. In the **Knowledge article suggestion** area, do any of the following:

   - Select an article title to go through and get relevant information. The selected knowledge article opens in a new application tab.
   - Select more commands to do the following:
     - **Copy Url:** Select to copy the knowledge article link to the clipboard.
     - **Email URL:** Select to open the email compose form with the link to the article pasted in the email body.
     - **Email:** Select to open the email compose form with the contents of the knowledge article pasted in the mail body.
   - Select the link icon to associate the article with the case as a related article.

4. In the **Similar case suggestions** area, do any of the following:

    - Select a case title to drill through the details of the resolved case.
    - Select more commands to do the following:
        - **Copy resolution:** Select to copy the resolution notes information from the resolved case to the clipboard.
        - **Email agent:** Select to open the email compose form to send your questions to the agent who handled the similar case. The mail form opens on a new tab with the pertinent information and link to the resolved case filled in.
    - Select the link icon to link or clear the link with the similar case.

See also

Enable AI-suggestions for similar cases and knowledge articles
Knowledge base search control powered by Relevance search
Create and manage knowledge articles
See similar case suggestions in Customer Service Hub

Manage cases using interactive dashboards

Article • 07/14/2021

Use interactive dashboards to effectively manage service cases in the Customer Service Hub application.

Dynamics 365 Customer Service interactive experience dashboards are a one-stop workplace where you review your workload and take actions. The information in the interactive dashboard is shown in real time, coming from views and queues. The interactive dashboards with their modern and intuitive interface are optimized for the customer service experience. For example, instead of paging through the application looking for a case, you'll be able to open and update the case right from the dashboard. This will save you time, help to focus on tasks at hand, and get more work done. You'll need sufficient permissions to use the interactive dashboards. The permissions will be assigned to you by an administrator.

Watch this video to learn more about dashboards in the Customer Service Hub: https://www.microsoft.com/en-us/videoplayer/embed/2a9199d6-67b8-486d-a915-1ed2fb33c80c?postJsllMsg=true

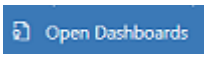
Interactive experience dashboards overview

The interactive dashboards come in two flavors:

- Multi-stream dashboards
- Single-stream dashboards

When you sign in to the Customer Service Hub, you're looking at the Tier 1 multi-stream default dashboard. A multi-stream dashboard displays data in real time over multiple data streams. The data in a stream is based on an entity's view or a queue, such as My Activities, My Cases, or Cases in the Banking Queue. While a stream always contains information only about one entity, each stream on the dashboard may contain information about a different entity. For example, you may be tracking cases in one stream and accounts in the other stream, but, you can't track cases and accounts in the same stream. In a multi-stream dashboard all streams may be displaying data based on the same entity.

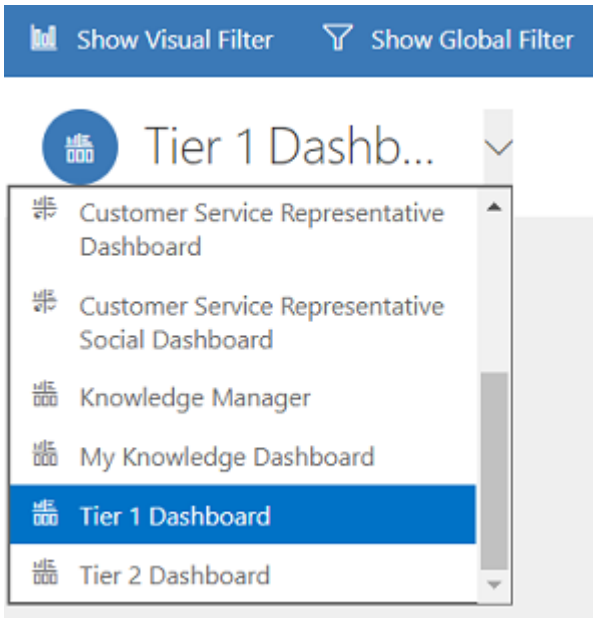
You could also be using a multi-stream entity-specific dashboard, such as the Cases dashboard. To open a dashboard like this, navigate to **Service** and down to a specific

entity, such as **Cases**. The default **Cases** grid is displayed. To directly open the **Cases** dashboard from the cases grid, select 

from the command bar.

> ⓘ **Note**
>
> You can access entity dashboards from the command bar on home page grids via **Open Dashboards** command.

Multi-stream dashboards target Tier 1 support, where customer service representatives handle many support cases at the same time. An entity-specific dashboard can be useful for Tier 1 representatives or Tier 2 customer representatives that look at fewer, but, more complex cases. In the multi-stream dashboard, you can easily switch from a standard view to the tile view. The interactive tiles show an aggregated view of the data across the queues or views. You can also select the tile to drill down to the underlying records. The interactive dashboard application opens with the Tier 1 interactive dashboard. However, you can make another selection from the available dashboards, as shown here:



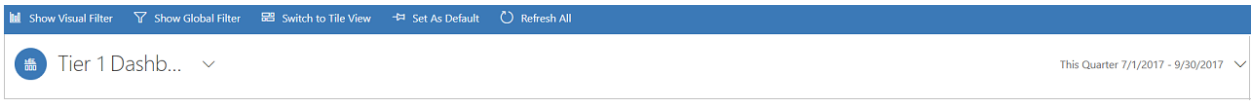
Single-stream dashboards display real-time data over one stream based on a view or queue. The tiles are positioned on the right side of the dashboards and are always shown. Single-stream dashboards are helpful to Tier 2 leads or managers, who monitor fewer, but more complex or escalated cases in a single view or queue.

Multi-stream and single-stream dashboards contain interactive charts that give you a count of relevant records, such as cases by priority or by status. These charts also act as visual filters.

You can apply additional filtering with **Global filters** and **Timeframe filters**. The Global filter works on streams and charts in the dashboard. You can sort the data in a stream based on different criteria, such as the priority, status, or the date when the record was created.

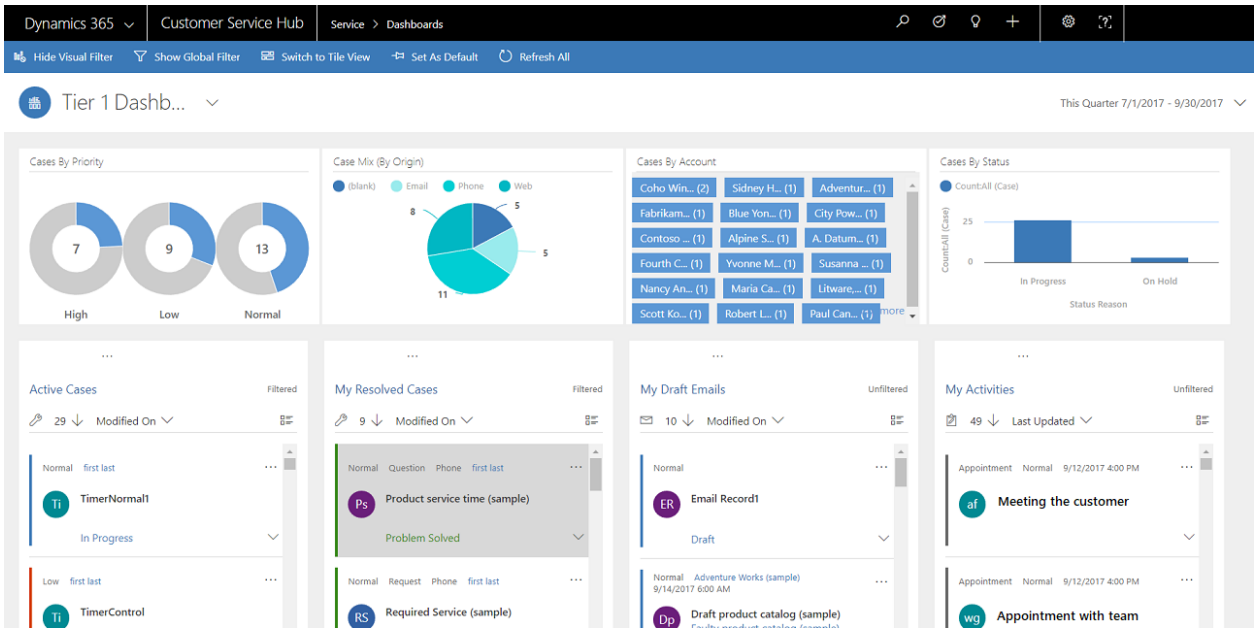
The illustrations given below show multi-stream and single-stream dashboards with the header pane. Below the header you see visual filters and streams. In the single-stream dashboard, you also see tiles. The dashboard header shown here contains the following controls and clickable buttons, from left to right:

- Dashboard selector
- Show Visual filter
- Show Global filter
- Switch to Tile view
- Set as Default
- Refresh All
- Timeframe filter



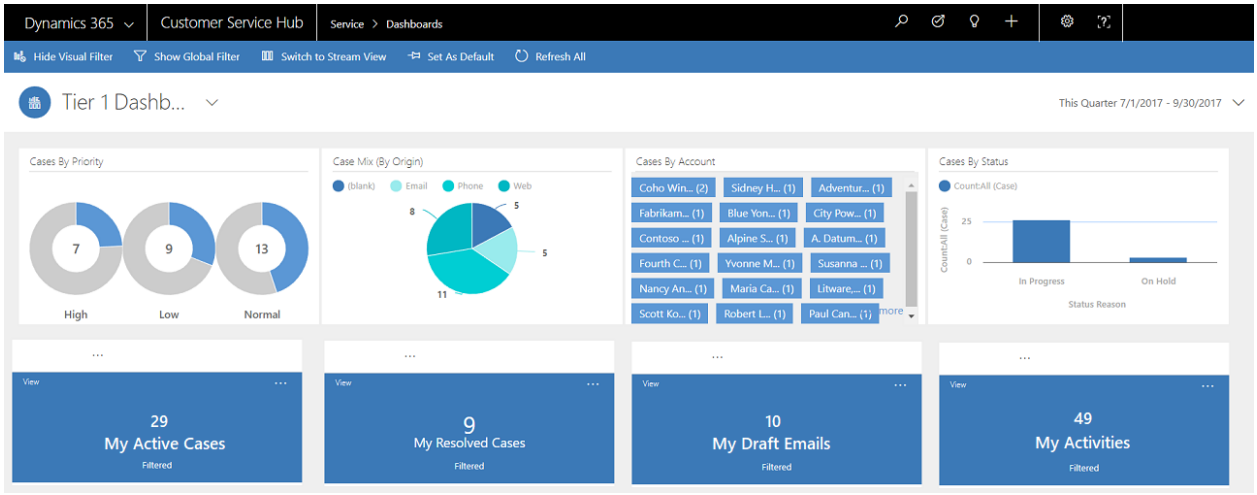
Multi-stream dashboard standard view (with visual filter)

In the multi-stream dashboard, when you select **Show Visual Filter**, you see a row of visual filters at the top with the data streams below.



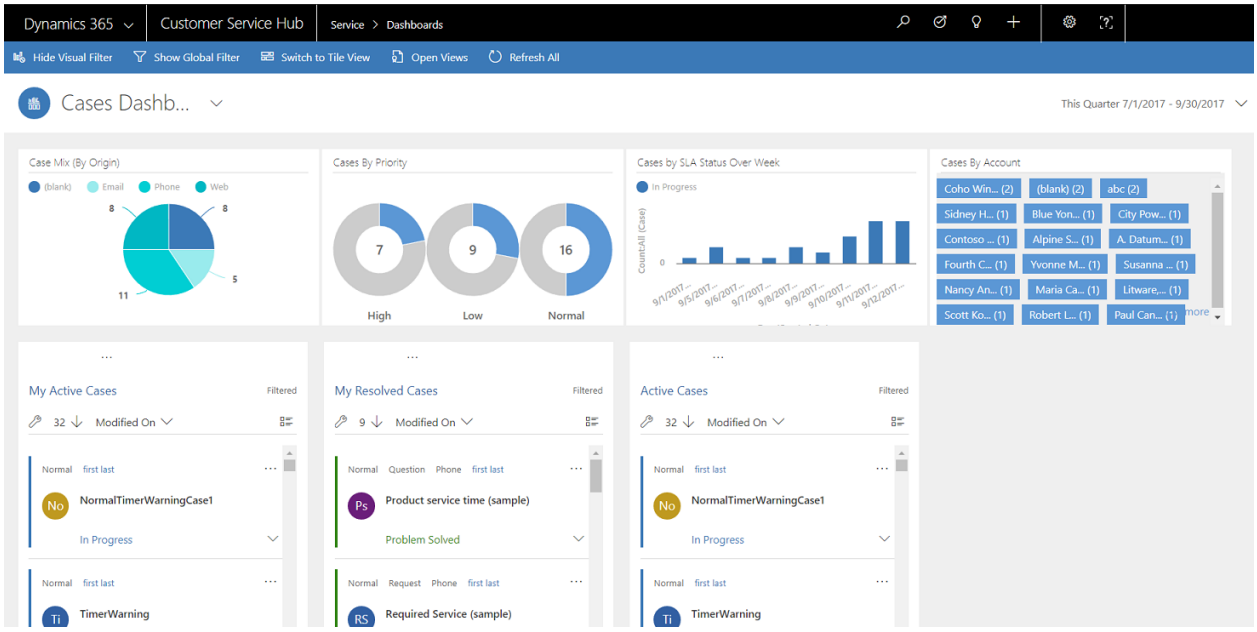
Multi-stream dashboard tile view (with visual filter)

The same dashboard, in the tile view.



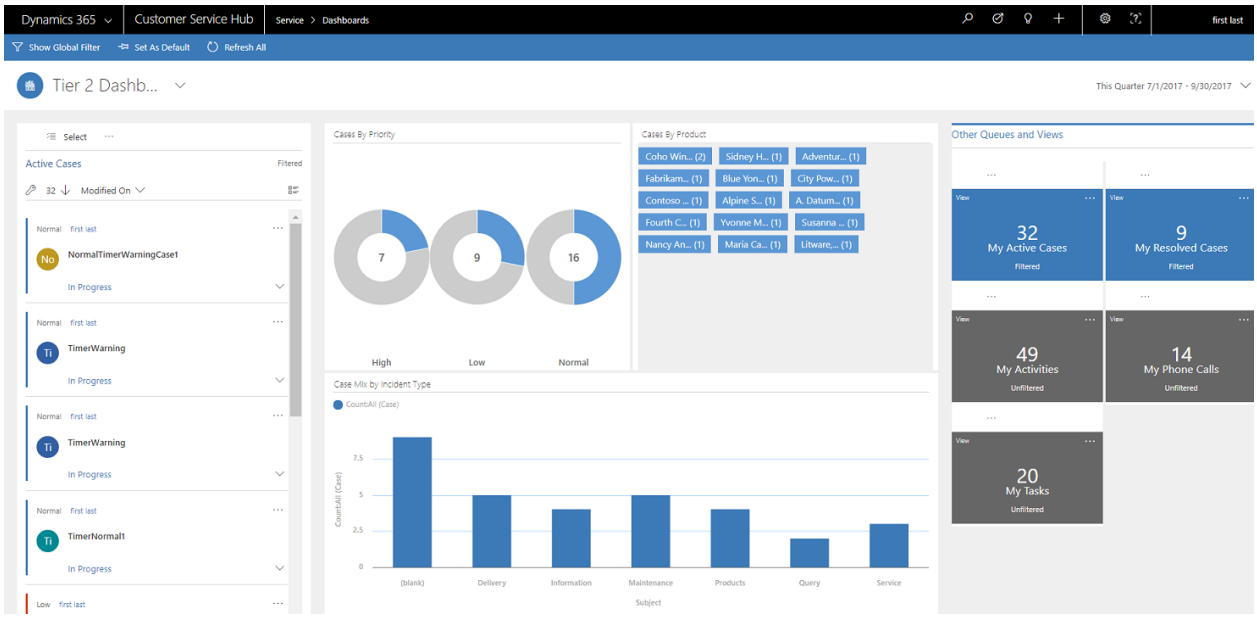
Multi-stream entity specific dashboard standard view (with visual filter)

The following illustration shows the entity specific dashboard for the **Case** entity, with enabled visual filter.

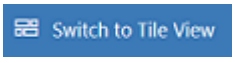


Single-stream dashboard

The single-stream dashboard contains the data stream on the left and visual filters and tiles on the right.



Interactive tiles

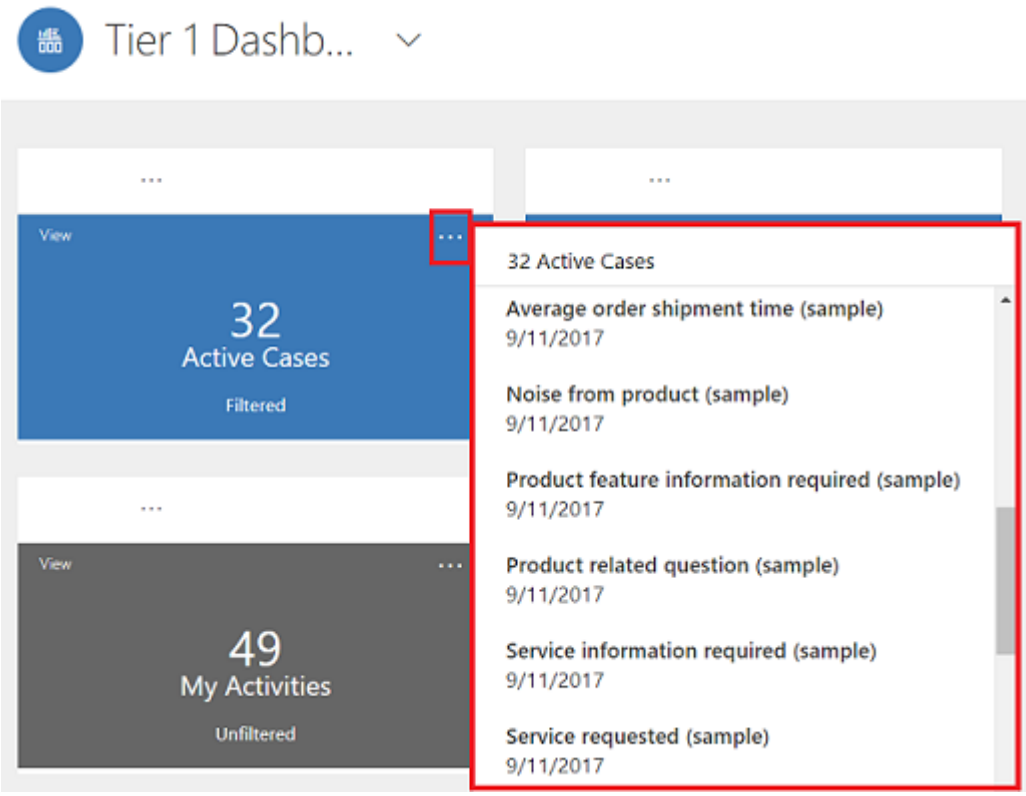
Interactive tiles provide an aggregated view of the information in the streams, across queues or views that interest you most. They help you monitor the volume of cases and quickly drill down to a particular case. In the multi-stream dashboard, you can switch from the standard view to the tile view by selecting 

given in the command bar.

If you have five streams in the multi-stream dashboard in the standard view, after you switch to tiles, you'll see five tiles. If a view that tracks your active cases contains 32 items, the corresponding **My Active Cases** tile will display a numerical number 32 in the center of the tile. To drill down to a particular case, do one of the following:

- Select the tile anywhere
- Select **View**
- Select **(...)** in the top right corner

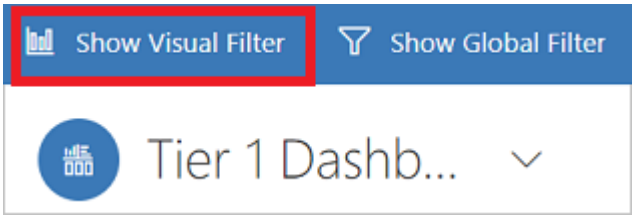
A flyout window will open. If there are too many cases to show, the window will have a scrollbar. You can navigate and select a particular case in the list, which will take you straight to the case form. The illustration shows the tiles and underlined cases in the list.



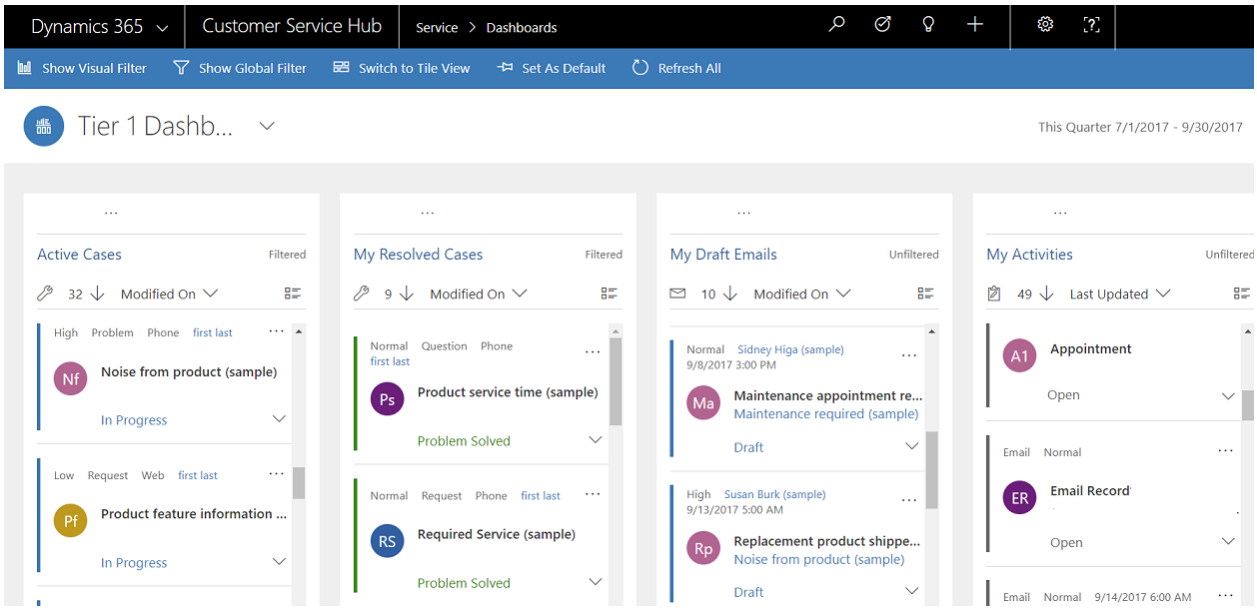
Visual Filter

Visual filters provide a visual snapshot of key metrics, such as cases by priority or by origin. They also help removing clutter from the screen and display information that interests you most. For example, if you select the **High Priority** circle in the **Cases by Priority** chart, the dashboard will refresh and you'll see only high priority cases in your data streams. You can find different types of charts on your dashboard, such as pie, bar, doughnut, or tag chart. Visual filters and tiles help you see the changes and patterns in data, and act quickly to address the most important issues.

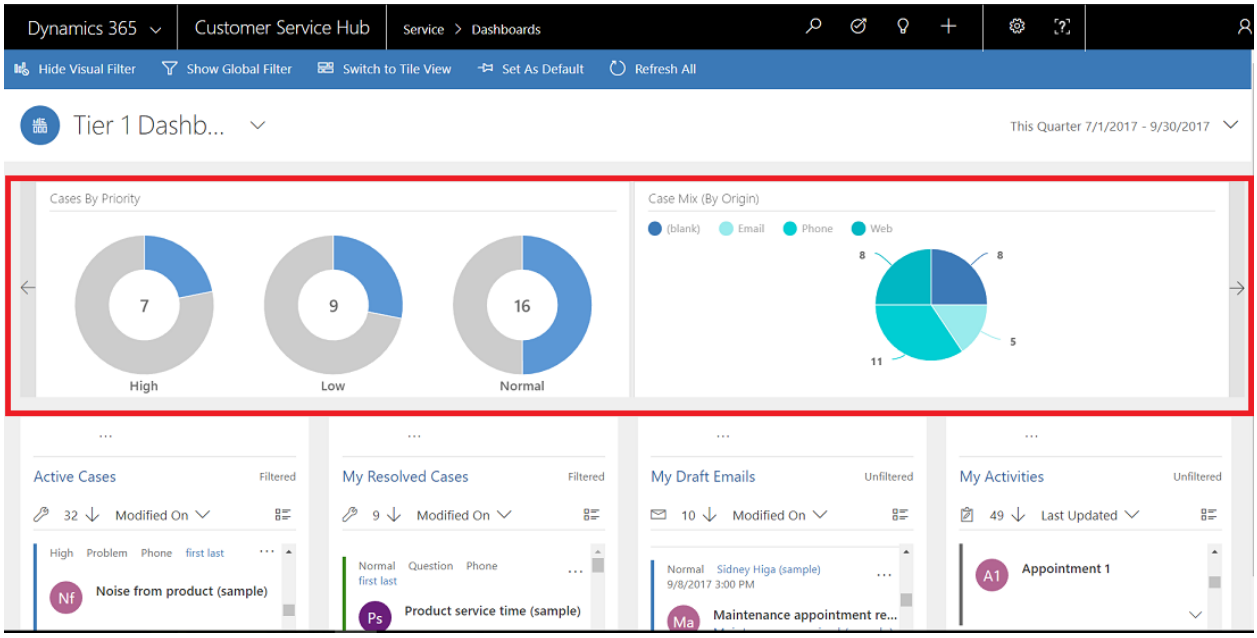
To display the charts on the dashboard, select the visual filter button in the dashboard header, as shown below. The clickable button acts as a toggle switch, to show or hide the visual filters on the dashboard. On the single-stream dashboard, the visual filters are always shown and can't be hidden from the view.



The following illustration shows the multi-stream dashboard without visual filters enabled:



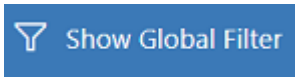
The following illustration shows the multi-stream dashboard with visual filters. You can use the arrows to move the view right or left to see all charts.



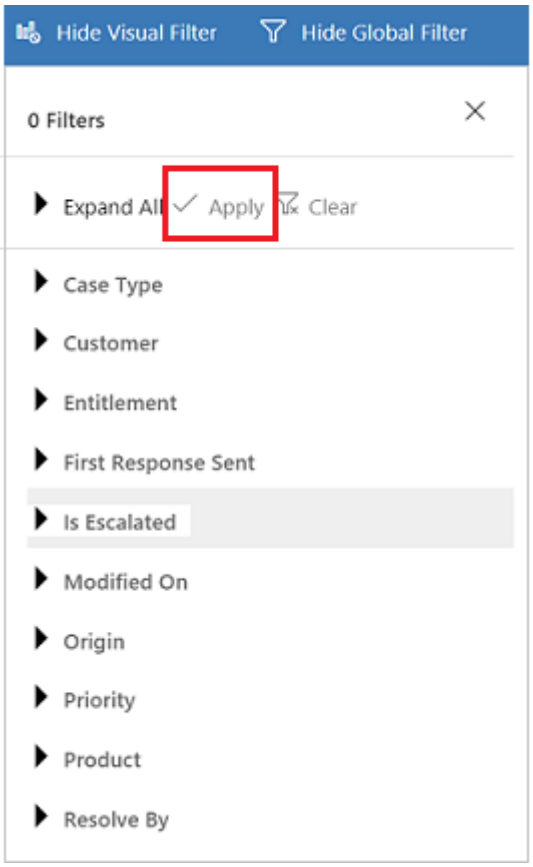
Global Filter

To add granularity to filtering data, you can use the Global filter. For example, you can apply the Global filter to show only escalated cases and the cases that are marked as "Request."

Select the **Show Global Filter** button in the command bar to view and apply global filters.



When you select the Global filter button, the filter flyout window opens. The entity fields that are preconfigured by your administrator appear in alphabetical order in the flyout window. You can select multiple values in a field, as well as values from multiple fields. Select **Apply** for the action to take place.



After you apply Global filters, the dashboard refreshes to show you only the cases in charts, streams, and tiles that are based on the filter entity (the filter entity is the entity that is used in the charts). To clear the Global filter, select **Clear** in the flyout window.

By using a combination of Visual and Global filters, you can drill down from a long list of cases to a more focused list.

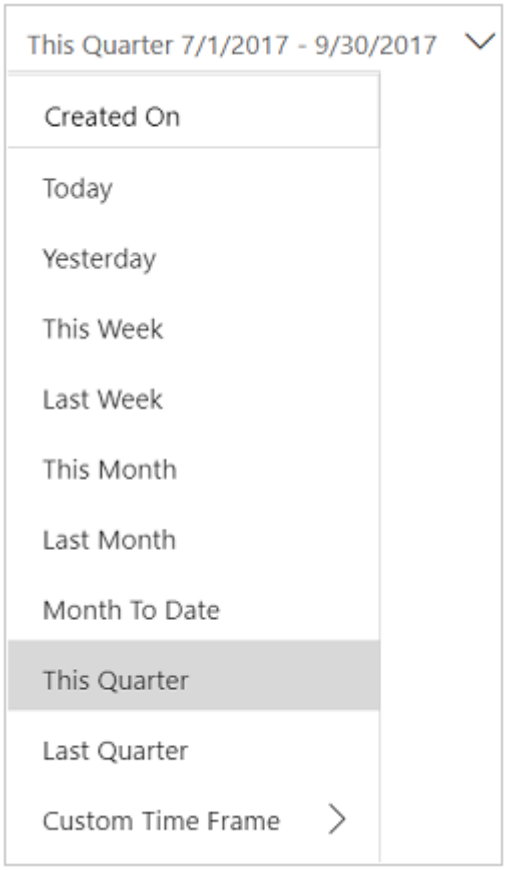
Clear the filters

Filtering helps remove the clutter on the screen and show only the work items that you want to focus on. However, if you want to see the entire unfiltered workload, select the specific filter button once again to clear the respective filter.

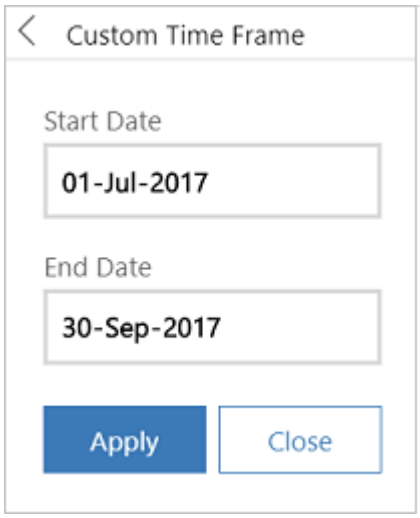
For example, select **Hide Visual Filter** to clear all visual filters applied on the records.

Timeframe filter

You can apply a specific timeframe to display cases in a specified period of time. The available timeframe filters are:

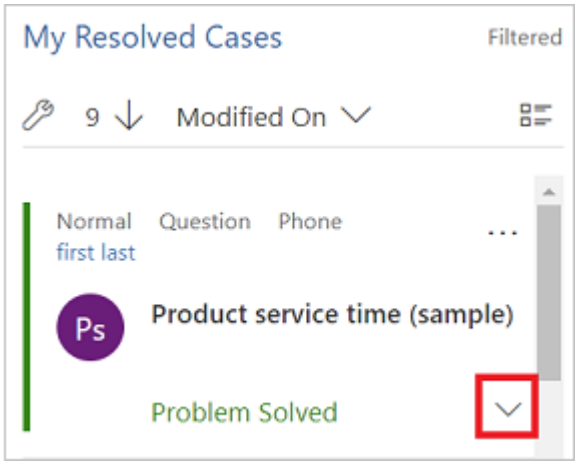


For example, you can choose to view cases created in **This Quarter**, or **Last Quarter**. You can also apply **Custom Time Frame** filter, where you can choose a particular start and end date to view the records created during a specific timeframe.



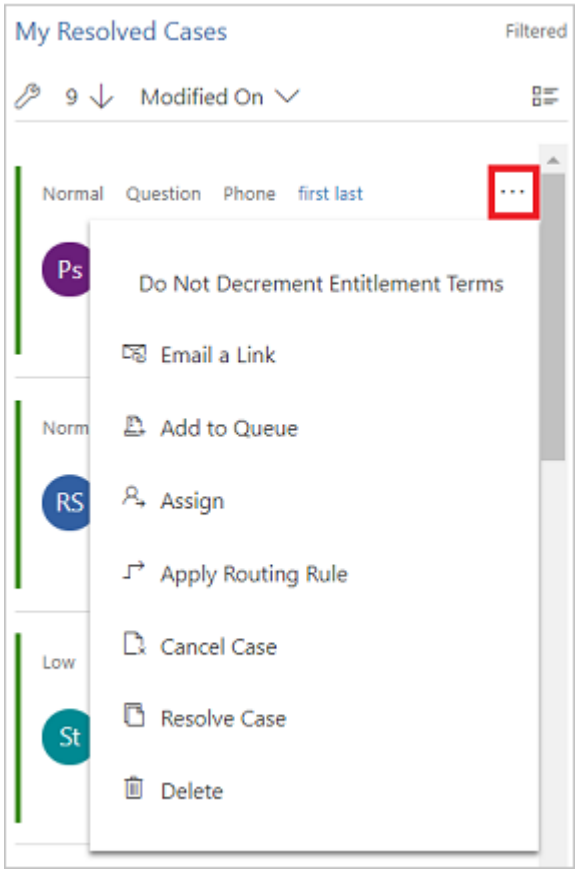
Collapse or expand work item description in the stream

To learn more about the work item, you can expand the work item description area. Select the arrow in the bottom right corner of the work item to expand or collapse the description, as shown here.



Show quick actions

Select the quick action menu (...) in the top right corner of the work item to open the quick actions menu. From this menu, you can directly resolve or cancel the work item, or assign the work item to another owner, as shown here:



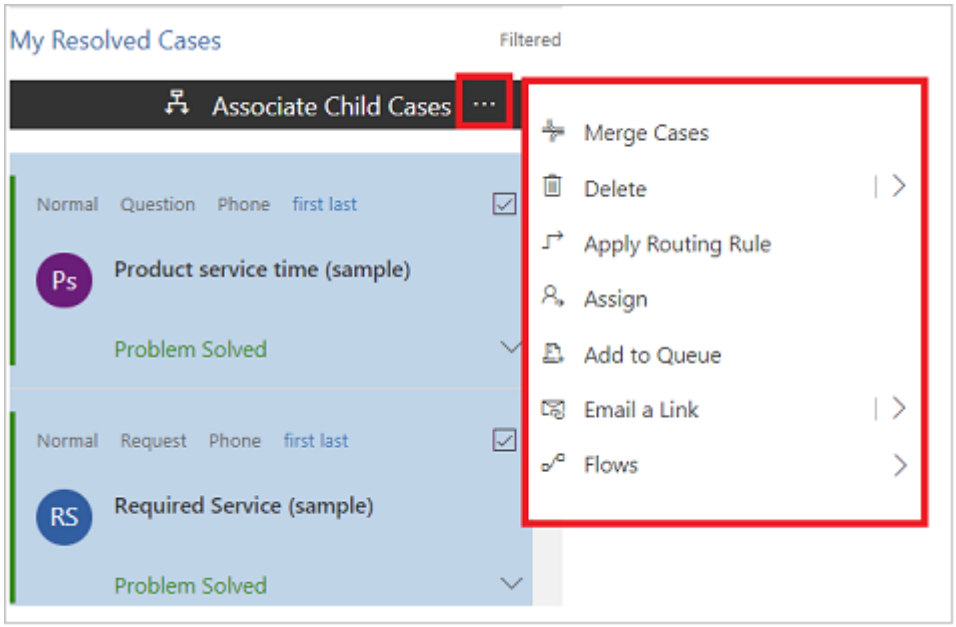
> ⓘ **Note**

The Quick action commands on the streams feature the full set of grid commands. These are configurable and are shared between dashboards and grids.

Apply Bulk Select

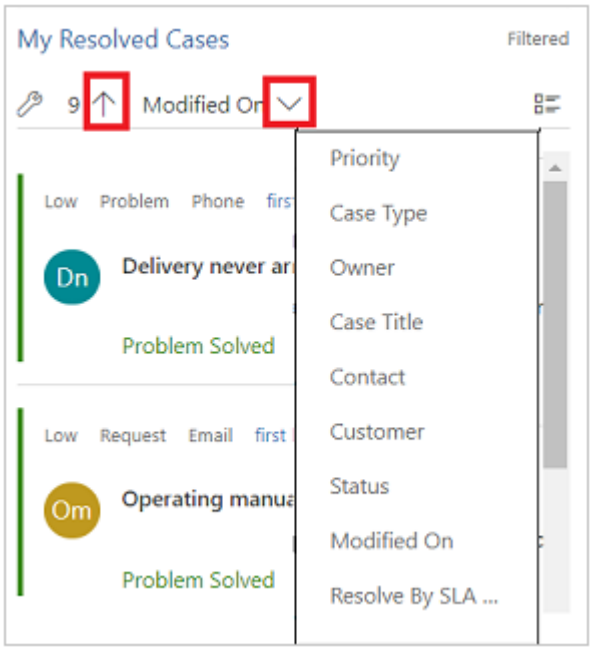
Benefit from the Bulk Select option, where you can select multiple records at one time and perform specific actions.

Select the Bulk Select icon and select multiple records by selecting the check box. Then select **(...)** to view the actions that can be performed on the selected records.



Change the sort order in the data stream

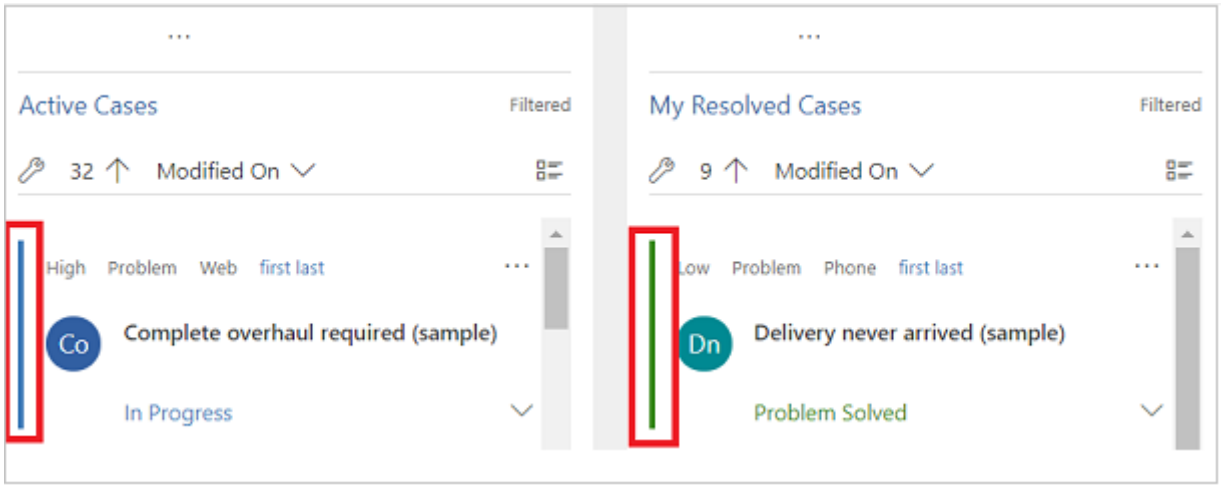
You can easily toggle the sort order in the stream by selecting the field name on which you want the data to be sorted. You can also sort the records by oldest or newest.



Color-coded data in streams and charts

The information in the charts and streams is color coded for the fields that contain a set of options. For example, a case type can be **Question**, **Problem**, or **Request**. A case's status can be **Resolve** or **In-progress**. Each of these options can be assigned a specific color. For example, cases that are **In-progress** can be shown in blue and **Resolved** cases can be shown in green.

In the streams, the color is depicted using the thin vertical line to the left of the work item description. You can work with your administrator to choose the colors you like for your dashboard data.



Information for customizers

For information on how to configure the interactive dashboards, see Configure interactive experience dashboards

See also

Configure interactive dashboards in the Customer Service Hub

Learn the basics of the Customer Service Hub

Allow updates for resolved and canceled cases

Article • 06/12/2023

Overview

Based on your business requirements, you might need to update case descriptions or other information after the cases have been resolved or canceled. For example, for General Data Protection Regulation compliance, you want to remove certain data from your case records. You can't update any details for cases if the status is resolved or canceled. However, you can update such case information by configuring and running flows in Power Automate or an API without having to reopen the case records in the UI.

> **Note**
>
> The option to update cases in resolved or canceled state is the default behavior.

Enable settings for allowing updates to cases in resolved or canceled state

Perform the following steps to enable modifications to cases that are in the resolved or canceled state:

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Case Settings** in **Customer Support**. The **Case Settings** page appears.

   b. Select **Manage** for **Other settings**.

2. In **Case update after resolution**, select **Resolved and canceled cases** in the **Allow updates for** list if it is not selected. You can also select only **Resolved cases**, **Closed cases**, or **Don't allow updates** based on your business needs.

3. Configure flows in Power Automate or use an API that can be run to update the case records.

See also

Automatically create or update records in Customer Service Hub

Modify the case resolution dialog

Article • 06/12/2023

You can customize the case resolution dialog to suit your business needs. You can modify the dialog to add fields like **Resolution type** or remove fields like **Billable Time**, if they don't apply to your business scenarios. You can also create case resolution rules by adding custom status values. The following sections discuss the permissions you'll need to modify the case resolution dialog and how to enable the option to customize dialogs in Customer Service Hub. You'll also learn to customize the case resolution dialog and add custom case resolution rules using examples.

> ⓘ **Note**
>
> The option to customize the case resolution dialog is also available in Dynamics 365 Customer Engagement (on-premises) 9.1. More information: **New features in Dynamics 365 Customer Engagement (on-premises)**

Check permissions

Make sure that the CSR Manager and Customer Service Representative security roles have the following permissions set for **Environment Variable Definition**:

- **Customer Service Manager**: Create, Read, and Write
- **Customer Service Representative**: Read

If you've created custom security roles, you'll need to update the roles to use the modified case resolution dialog.

Customize dialogs

By default, the style of the **Resolve case** dialog is set to standard dialog. You can, however, change the style to **Customizable dialog** so that you can add custom fields and values.

To enable the Customizable dialog option

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

a. In the site map, select **Case Settings** in **Customer Support**. The **Case Settings** page appears.

b. Select **Manage** for **Other Settings**.

2. On the **Service Configuration Settings** page, scroll to the **Resolve case dialog** section, and then select **Customizable dialog** from the dropdown list.

3. Select **Save**.

Add or remove fields from the case resolution dialog

You can modify the case resolution dialog and remove a field so that it no longer appears at runtime for the user.

As an example, let's see how to remove the **Billable Time** field from the **Information** form.

> ⓘ **Note**
>
> - Ensure that the **Total Time** field is added to the case resolution dialog, for the **Billable Time** field to display the amount of time an agent worked on a case automatically.
> - Case resolution isn't supported if **Regarding** is added to **Case resolution dialog**.

1. In the solution explorer under **Components**, expand **Entities**, select **Case Resolution**, and then select **Forms**.

2. Open the form you want to edit. For this example, let's select the **Information** form. The form opens in the form designer.

3. In the form designer, do the following actions:

   a. Select **Billable Time**.

   b. On the command bar, select **Remove**.

4. Select **Save**, and then select **Publish**.

When the customer service representatives try to resolve a case, the case resolution dialog won't display the field that you removed.

Add custom values to the case resolution dialog

Let's understand how to add custom status values to the case resolution dialog with an example. Say, for example, you receive many similar business cases and you want to improve agent productivity and reduce case resolution time. You can add a case resolution rule where any case that's similar to a previously resolved case can be resolved by marking it as a "duplicate case".

1. Update the Case entity to add a new **Resolved** status type and assign a **Duplicate** custom value to it.
2. Update the resolution type of the Case Resolution entity with the same custom value to ensure that all duplicate cases are assigned the same resolution type.

> **ⓘ Important**
>
> If you change the value in **Case entity**, be sure to update the value in **Case Resolution entity** so they match. If the values don't match, an error might occur. If the values don't match in the customizable dialog, the values that you specified won't be displayed.

Update the case entity

1. In Dynamics 365, go to **Advanced Settings**, select **Customizations**, and then select **Customize the System**.

   If using Power Apps, go to **Settings**, and under **Power Apps**, select **Advanced Settings**, then select **Customizations** and **Customize the System**.

2. In the site map of the page that appears, under **Components**, expand **Entities**, select **Case**, and then select **Fields**.

3. On the page that appears, select the field you want to update. For this example, let's select **statuscode** in the **Name** column.

4. Double-click to select the **statuscode** field. The **General** tab of **Status Reason of Case** is displayed.

5. In the **Status** dropdown list in the **Type** section, select a status. For this example, let's select **Resolved** and then select **Add**. The **Add List Value** dialog is displayed.
6. In the **Label** field, enter **Duplicate** and note down the value listed in the **Value** field.
7. Select **OK**.
8. If you've preconfigured status reason transitions, select **Edit Status Reason Transitions** to set up new status reasons. For more information, see: Define status reason transitions.
9. Select **Save and Close**. You've successfully added a custom status type and status value to the case entity.

Update the case resolution entity

1. In the solution explorer under **Components**, expand **Entities**, select **Case Resolution**, and then select **Fields**.
2. On the page that appears, select the field that you want to update. For this example, let's select **resolutiontypecode** in the **Name** column.
3. Double-click to select the **resolutiontypecode** field. The **General** tab of **Resolution Type of Case Resolution** is displayed.
4. In the **Options** section, select the plus sign to add a new item to the **Label** and **Value** fields.
5. In the **Label** field, enter a value name; **Duplicate** in our example. In the **Value** field, enter the corresponding value you noted earlier in the case entity **statuscode** field.
6. Select **Save and Close**.

Continuing with the same example, let's now see how to use the **Duplicate** custom status value in case resolution, so that duplicate cases are automatically marked as resolved.

Automatically resolve duplicate cases

Now, let's see how to use the **Duplicate** custom status value in case resolution, so that duplicate cases are automatically marked as resolved.

1. In Customer Service workspace, open a case that you recognize as similar or duplicate of a previously resolved case. The **Summary** page with the case details

opens. If you're using Customer Service Hub, in the site map, go to **Service**, select **Cases**, and select a case.

2. To resolve the case, select **Resolve Case** on the command bar.

3. In the **New Case Resolution** dialog that opens, do the following:
   a. In the **Resolution Type** dropdown list, select **Duplicate**.
   b. In the **Resolution** field, add case resolution notes.

4. Select **Save and Close**.

The case is automatically marked as resolved and you'll see the resolved status for the case displayed on top of the case title.

See also

Work with cases
Create a case
Merge cases
Resolve, cancel, and reassign cases
Create and manage parent and child cases
Case queues and routing
Convert case to knowledge article
Case SLAs
Learn the basics of the Customer Service Hub
Use the main form and its components

Remove validation on contact and customer for cases in Customer Service

Article • 08/25/2021

Introduction

When you create or update a case record for a customer and contact, out of the box, the contact record must be associated with the customer record. However, based on your business requirements, you might need to select a contact record that doesn't belong to the customer organization. To meet your business needs, you can customize the case form to remove the form validation and thereby allow an unrelated contact be linked with the case.

Remove the validation on contact and customer for a case

Perform the following steps to disable the validation on contacts and customers:

1. Go to the Power Apps portal.
2. Select the required environment, select **Solutions** in the left pane.
3. On the **Solutions** page, select Default Solution.
4. On the top right, select All, and then select Environment variable in the list.
5. Select the ellipses for msdyn_IncidentShouldValidatePrimaryContact, and then select Edit.
6. On the flyout menu that appears, select **New value**, enter the number **0**, and select **Save**.

Now, when agents are creating or updating a case, they can select contacts who are not part of the customer organization.

See also

Overview of Customer Service workspace
Create a case
Environment variables in Power Apps

Automatically create or update records

Article • 10/09/2023

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

You can automatically create or update system or custom records from incoming activities, such as emails, social activities, and custom activities. In this section, you'll learn about creating rules for automatically creating records for cases from incoming emails.

> **Note**
>
> Modern automatic record creation and update rules isn't supported on on-premises environments.

Set up rules for creating or updating records automatically

Every organization has multiple applications to capture customer interactions. The ability to channel external data into Microsoft Dataverse records can significantly improve the efficiency of your sales, marketing, and service teams, and increase the quality of your data. You can now direct this data from various applications and external sources into Dataverse with the help of *record creation and update rules*.

A record creation and update rule consist of rule items. The rule items define the conditions for creating or updating records, and also define the actions or steps to be taken on the records.

When a case record is created through an automatic record creation rule, and the rule owner is a team, the owner of the case record will be the team's administrator user.

Activities and entities supported by rules for creating or updating records automatically

By default, Dynamics 365 Customer Service supports creating records from the following activities:

- Email
- Social activity
- Task
- Phone call
- Appointment
- Service activity
- Custom activity

These activities can be converted to any default (system) entity records or custom entity records. For example, you could create a lead, opportunity (system record), or incident (custom record) from an incoming email.

Prerequisites

Make sure that the following prerequisites are met:

- Permissions, roles, and the Power Automate license to create automatic record creation rules.
- Information on the queues for which you want to create the rules.

Configure rules for creating or updating records automatically

You can configure a rule that when active will be run for incoming emails. By using the feature to create rules, you can define the conditions for when a rule can be run.

You can configure the rules in the Customer Service admin center or Customer Service Hub app.

1. Go to one of the admin apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Case Settings** in **Customer Support**. The **Case Settings** page appears.
   b. In the **Automatic record creation and update rules** section, select **Manage**.

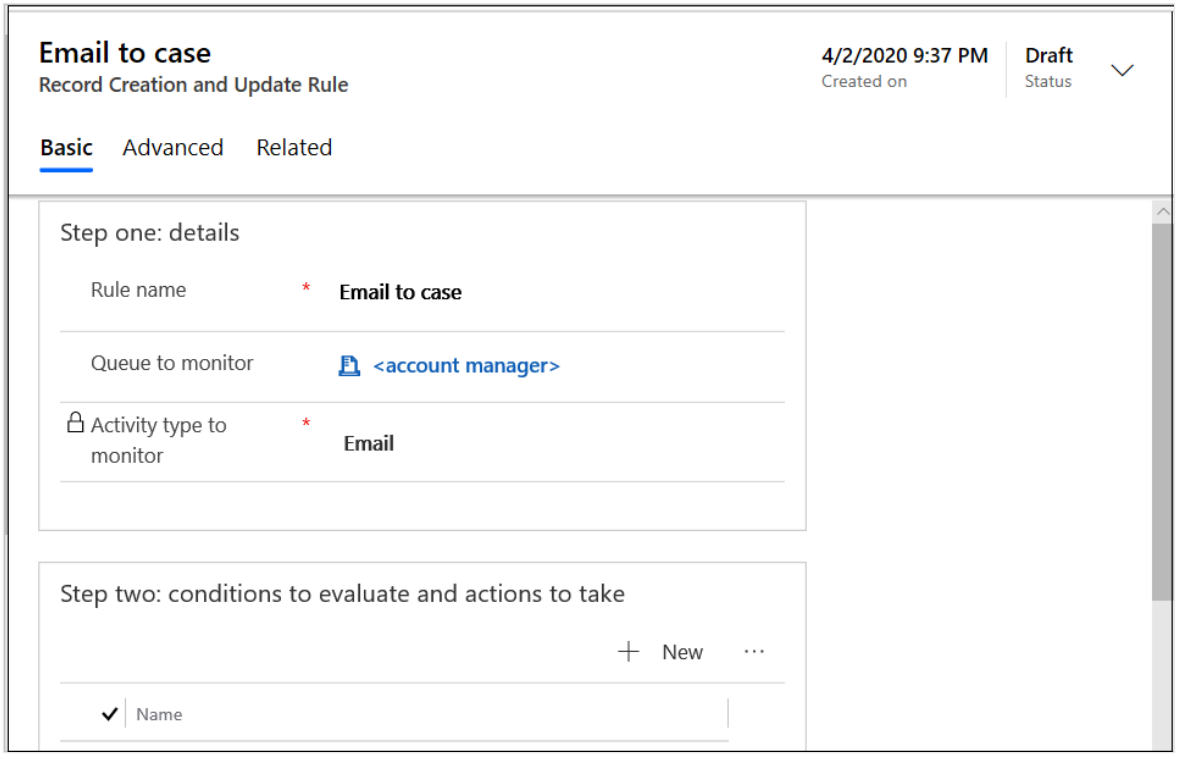
   The **All Record Creation and Update Rules** page is displayed.

2. Select **New**. The **New Record Creation and Update Rule** page is displayed.

3. On the **Basic** tab, in **Step one details**, enter the following details:

   - **Rule name**: Enter a name for the rule.
   - **Queue to monitor**: Select a queue on which the rule will be activated. For email activity, you must select a queue to be able to activate the rule.
   - **Activity type to monitor**: Select **Email** in the list.

4. Select **Save**. The **Step two: conditions to evaluate and actions to take** area is enabled.



5. In **Step two: conditions to evaluate and actions to take**, select **New**. The **Condition builder** page is displayed.

> **Note**
>
> You must add a minimum of one condition for the rule to run successfully.

6. Perform the following steps:

   a. In **Condition** > **Condition name**, enter an intuitive name.

   b. In **Condition that must pass to continue (pass if blank)**, select **Add**.

   c. Use the following options to define the criteria for the rule to be evaluated:

   i. Add row

ii. Add group

iii. Add related entity

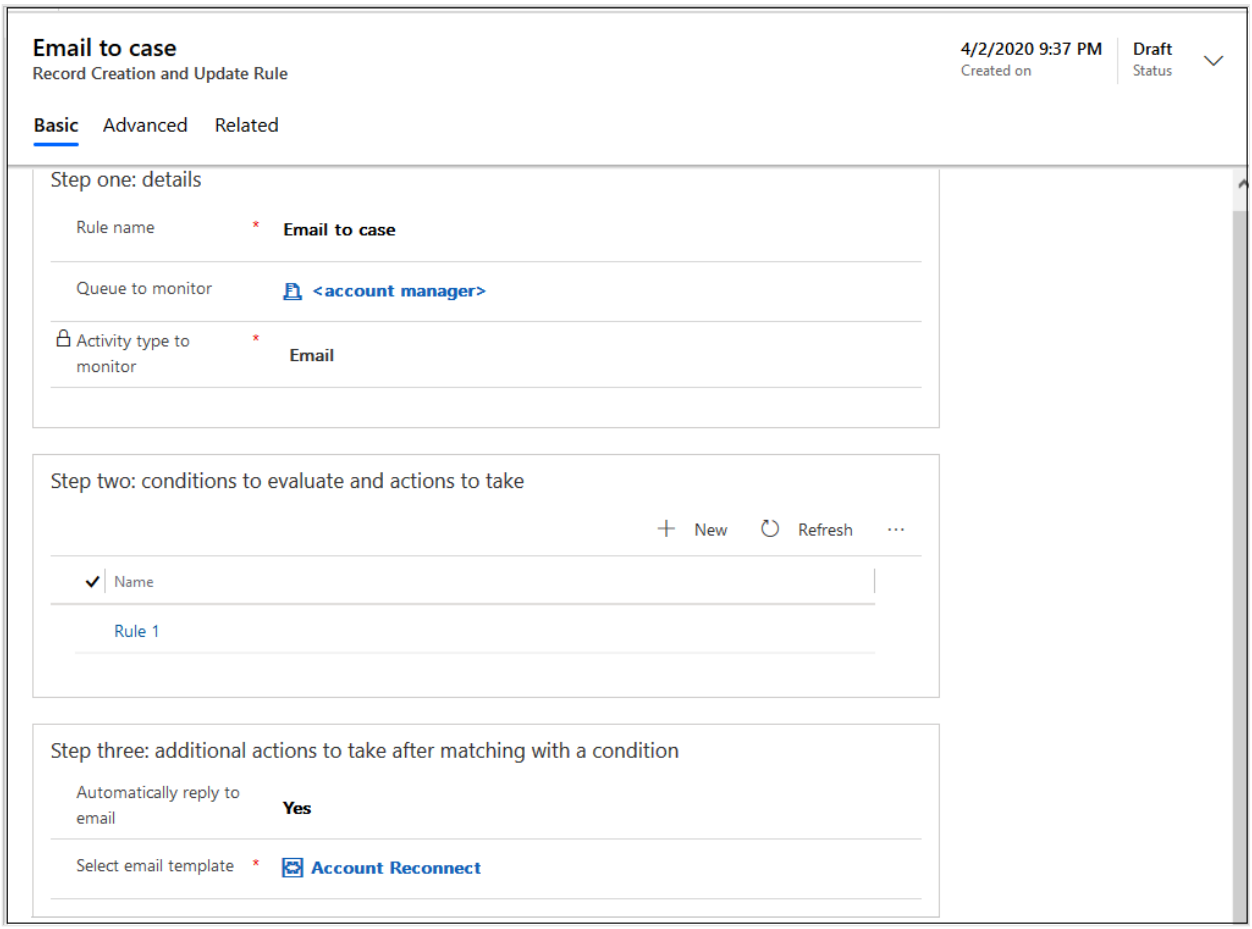
7. In **Actions to take** > **Record to create**, make sure the value is **Case**. A case will be created if the conditions specified are met for the email activity.

8. In **Configure in Microsoft Power Automate**, select **Save and open in Power Automate**. The Power Automate application opens in a new tab where you can configure criteria that must be evaluated for the email activity. To learn more about using Power Automate, see the documentation for Power Automate.

9. Select **Save & Close**. The condition builder is closed.

10. In **Step three: additional actions to take after matching with a condition**, select an option based on your requirement for **Automatically reply to email**.

11. If you select **Yes**, select an email template in the **Select email template** list box.



> **Note**
>
> The rule will be in the draft status until you activate it.

How do record creation and update rules work with queues

In a record creation and update rule, when you specify a queue for a source type, any incoming activity from that source is added as a queue item for that specified queue. That is, if a rule for a particular source activity and queue combination is active, the rule processes the incoming activity on that queue to create or update records. When an email is processed by an automatic record creation rule, a queue item is created. If the email has the queue's email in the blind carbon copy (Bcc) or carbon copy (Cc), a queue item is created from server-side sync. By default, two queue items are created if the email has the queue's mail in both the "To" and "Bcc" or "Cc" fields. To control the creation of the queue items, you can set the **CreateQueueItemForSynchronizingMailbox** toggle in your organization's configuration settings. More information: Create queue items from synchronized email messages

For an email source type, you must specify a queue. For all other source types including custom activities, it is optional.

> ⓘ **Note**
>
> When an automatic record creation rule is applied to an Email queue item, it gets deactivated.

Configure advanced settings for rules

On the **Advanced** tab of the **Record creation and update rule** page for a rule, you can configure actions that can be automatically performed before the conditions for the rule are evaluated.

1. On the **Automatic record creation and update rules** page, select the rule in the list that you want to update. The <*rule_name*> page appears.

2. Select the **Advanced** tab, and do the following in **Before evaluating conditions**:

    - **Allow emails from unknown senders**: Set it to yes if you want records to be created when email messages arrive from senders whose email addresses aren't present in any contact or account records.

      This option, with the Automatically create records in Dynamics 365 for Customer Engagement option in the rule owner's Personal Options,

determines whether a case and contact record is created. To learn more, see Set personal options.

- **Manage unknown senders by**: Select one of the following options:
  - **Creating a new contact automatically**: Specify if you want a contact to be created automatically.
  - **Mapping in Power Automate manually**: Specify if you want to evaluate and set up the resolution for the contact in Power Automate.

    > **ⓘ Important**
    >
    > If you select to map the contact manually, make sure that you create a mapping in Power Automate for the customer field. More information: **Manually map a contact in Power Automate**

- **Require a valid entitlement on the connected case**: If you select **Yes**, a case is created only if an active entitlement exists for the customer.

  If the sender of the email is a contact with a parent account, a record is created if the contact's parent account has a valid entitlement, and the contact is listed in the **Contacts** section of the entitlement or if the **Contacts** section is empty (which means the entitlement is applicable to all contacts for the customer).

- **Wait for a specific amount of time after the connected case has been resolved**: Select **Yes**, and then select a time value in the **Select the amount of time** box that appears. No new case will be created until the specified period of time lapses after a related case is resolved. For example, if you have set the value to yes and specify one hour, and a case exists for a printer issue, when a mail comes for the same printer issue, another case won't be created until one hour lapses after the existing printer issue case is resolved.

  The resolved case won't be re-opened automatically when the incoming email is associated with it. However, you can configure flows using Power Automate, to re-open a resolved case when an incoming email is associated with the resolved case.

  If set to **No**, no case will be created if a related case exists.

  > **ⓘ Note**

> If you want a case to be created without any time lapse, then set **Wait for a specific amount of time after the connected case has been resolved** to **Yes** and don't select any time duration in the **Select the amount of time** box.

3. In **Advanced settings**, by default the user who is creating the rule is listed in the **Owner whose permissions the rule uses to run** box. You can add more users or change the default value.
4. Select **Save** or **Save & Close**.

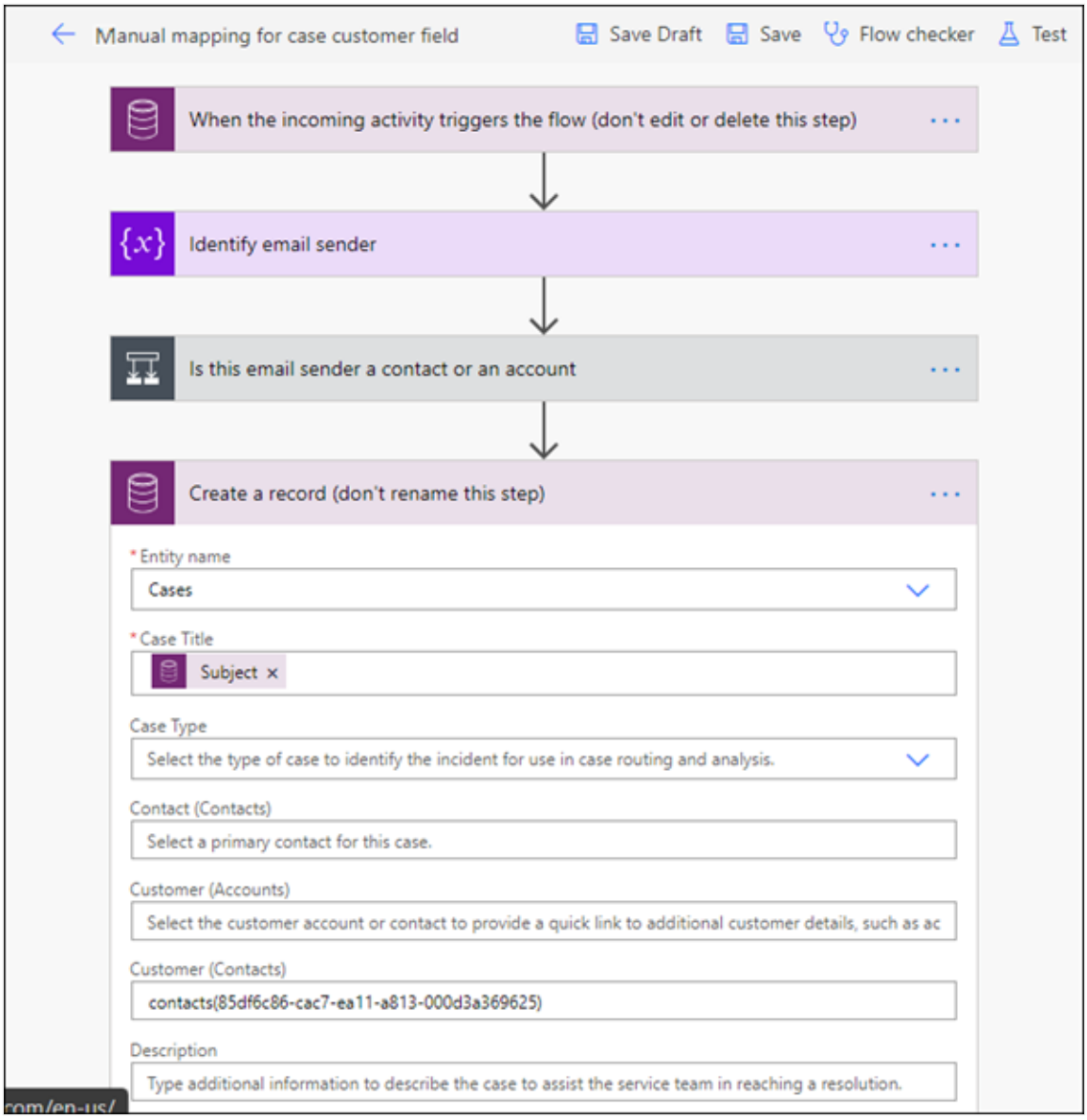
Change the order of rule items to be evaluated

The rules are run in the order they're listed in the rule items list. If the incoming activity matches the condition specified in the rule item one, the case is created and the rest of the rule items aren't evaluated. You can reorder the rule items when more than one rule item exists for a rule.

Manually map a contact in Power Automate

Perform the following steps to manually map a contact in Power Automate:

1. In the app in Customer Service, go to the automatic record creation and update rule feature, and then select the rule that you want to edit.
2. In the **Step two: conditions to evaluate and actions to take** area, select the rule item for which you want to manually map the contact in Power Automate.
3. On the page that appears, on the **Condition builder** tab, select **Save and open Power Automate**. The Power Automate workflow opens on a new tab.
    a. Accept the default connection settings, and select **Continue**.
    b. On the page that's displayed, in the **Is this email sender a contact or an account** step, for the **If no** option, select the ellipses for **Terminate when no valid customer found**, and select **Delete**.
    c. Select **OK** on the confirmation dialog.
    d. In the **Create a record (don't rename this step)** step of the workflow, specify the required value in the **Customer (Contacts)** box.
    e. Make sure that you remove the default mappings from **Contact (Contacts)** and **Customer (Accounts)**.



> **Important**
>
> If you want to map an account, make sure that you remove the default mappings from the **Contact (Contacts)** and **Customer (Contacts)** boxes and specify only an account in the **Customer (Accounts)** box for the workflow to run without errors.

f. Save and close.

Process emails from known senders only

To process emails from known senders only, do the following steps in Power Automate for the associated rule item:

1. On the Power Automate workflow page, accept the default connection settings, and select **Continue**.

2. On the page that's displayed, in the **Is this email sender a contact or an account** step, for the **If no** option, make sure that the **Terminate when no valid customer found** option is available.

3. Save the changes.

The mails from known senders only will be processed.

Create contacts for unknown senders

The steps in this section are applicable only when you select the option to manually map in Power Automate in the **Manage unknown senders by** field on the **Advanced** tab of the record creation and update rule.

The option to create the contact is based on the email recipient's permission. If the email recipient doesn't have permission to create a contact and you prefer to not give them this permission, you can configure an environment variable to use the permissions of the rule owner. More information: Create contacts for unknown senders using rule owner context

To create a contact for unknown senders of mail, configure the following options in Power Automate for the associated rule item:

1. In the **Is this email sender a contact or an account** step, for the **If no** option, delete the **Terminate when no valid customer found** action.

2. Select **Add an action**, and in the **Choose an operation** box, search for "Add a new row", and select it.

3. In **Table name**, select **Contacts**.

4. In **Email**, search for "From" in **Dynamic content**, and select it.

5. Select **Add an action** again, and in **Choose an operation** search for "Set variable", and select it.

6. In **Name**, select **Customer from email sender**.

7. In **Value**, search for "OData Id" in **Dynamic content**, and select it. "OData Id" is derived when you create a new contact record.

8. In the **Create a record (don't rename this step)** option, search for **Contact (Contacts)**, and use the following expression:

```
if(equals(triggerOutputs()?['body/_emailsender_type'], 'contacts'),
if(contains(variables('Customer from email sender'), triggerOutputs()?
['body/_emailsender_value']) , string(''), concat('contacts(',triggerOutputs()?
['body/_emailsender_value'], ')')), string(''))
```

9. Save the changes.

Create contacts for unknown senders using rule owner context

By default, a contact for unknown email sender is created with the email recipient's context. To switch to use the rule owner permissions to create the new contact, you can configure the msdyn_ArcCreateContactWithRuleOwner environment variable as follows:

1. Go to the Power Apps portal.
2. Select the required environment, and then select **Solutions** in the left pane.
3. On the **Solutions** page, select **Default Solution**.
4. Search for **Environment variables**, and select the **msdyn_ArcCreateContactWithRuleOwner** environment variable.
5. On the edit page that appears, set the **Current Value** as **1** to override the default value.
6. Save and publish the customization.

Activate a rule for creating or updating records automatically

For any record creation and update rule to apply to a matching incoming activity, after you add the rule items, you must activate the rule.

Manage automatic record creation and update rule from a queue form

You can create or manage an automatic record creation and update rule from a queue form. To learn more, see More information: Create or change a queue

Manage activity monitor to review and track rules

You can review and track the health of the automatic record creation rules and resolve issues around them. See: Manage activity monitor to review and track rules

Troubleshoot cases

Issue converting an email to a case

See also

Create and manage queues
Create rules to automatically route cases
FAQ on activity monitor

Use activity monitor to review and track rules

Article • 10/09/2023

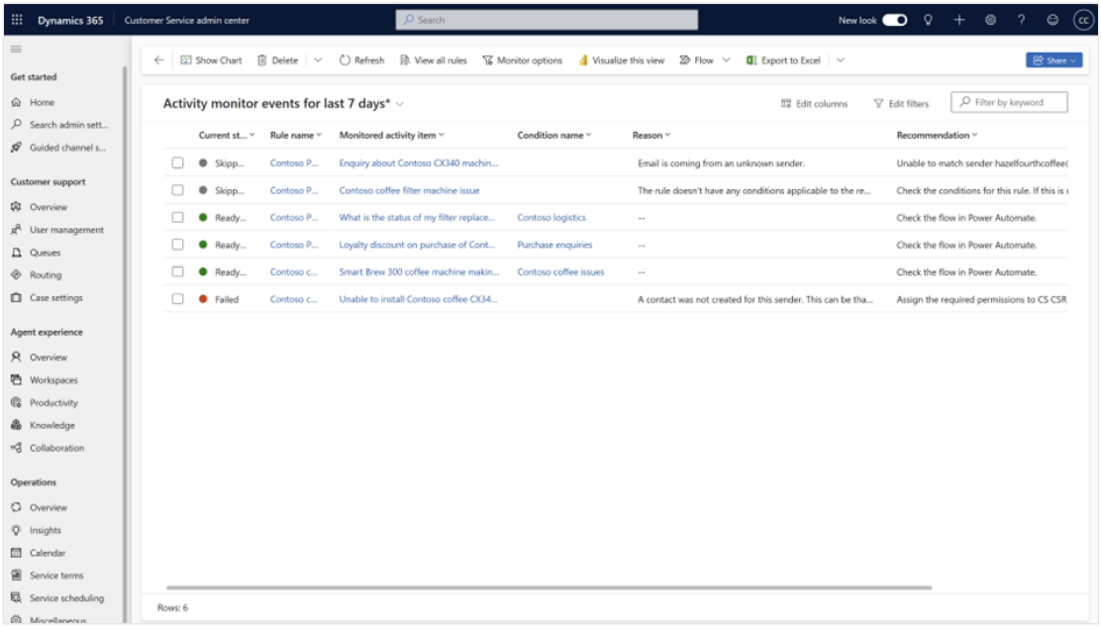
You can review and track the health of the automatic record creation rules and resolve issues around them. By default, the activity monitor captures all the states. You can customize the events that you want to monitor by deselecting the monitor options in the application.

> **Note**
>
> - The activity monitor works in online environments only, such as cloud applications.
> - The activity monitor tracks the rules until they're evaluated in Customer Service only and before the rule runs in Power Automate.

In Customer Service admin center, the Customer support overview page displays the number of activity monitor events that ran in the past week along with their status. You can use either the **Activity monitor events for last 7 days** or **All activity monitor events** to view the activity monitor details.

1. Navigate to the views as follows:

   - Select **Activity monitor events(past 7 days)** on Customer support overview to view the activity events for the last 7 days on the **Activity monitor events for last 7 days** page.



- Select **Case Settings** > **Automatic record creation and update rules** > **Record creation and update rules** and then select **View activity monitor** on the command bar to view the list of all the activity events on the **All activity monitor events** page.

2. The following details are available for the rules in the activity views:

   - **Current state:** Displays the state, such as, Failed, Skipped, or Ready for Power Automate.
   - **Rule name:** Name of the record creation rule.
   - **Monitored activity type:** Activity type, such as email, task, or appointment. By default this is not available on the **Activity monitor events for last 7 days** page. Use **Edit columns** to add the column to the view.
   - **Monitored activity item:** Displays the subject of the activity type.
   - **Condition name:** The name of the condition in which the issue occurred.
   - **Reason:** Displays information on how the rule was handled. For example, a case isn't created if the **Current state** for a rule is Skipped because an email is sent from an unknown sender who isn't added to **Contacts** and the rule condition, **Allow email from unknown senders** is set to No.
   - **Recommendation**: Displays the steps you can follow to resolve the issue. For example, if an email was sent from an unknown sender and the **Current state** for a rule is **Skipped** with **Reason**, Email is coming from an unknown sender, the application displays the recommendation to set **Allow email from unknown senders** to Yes.

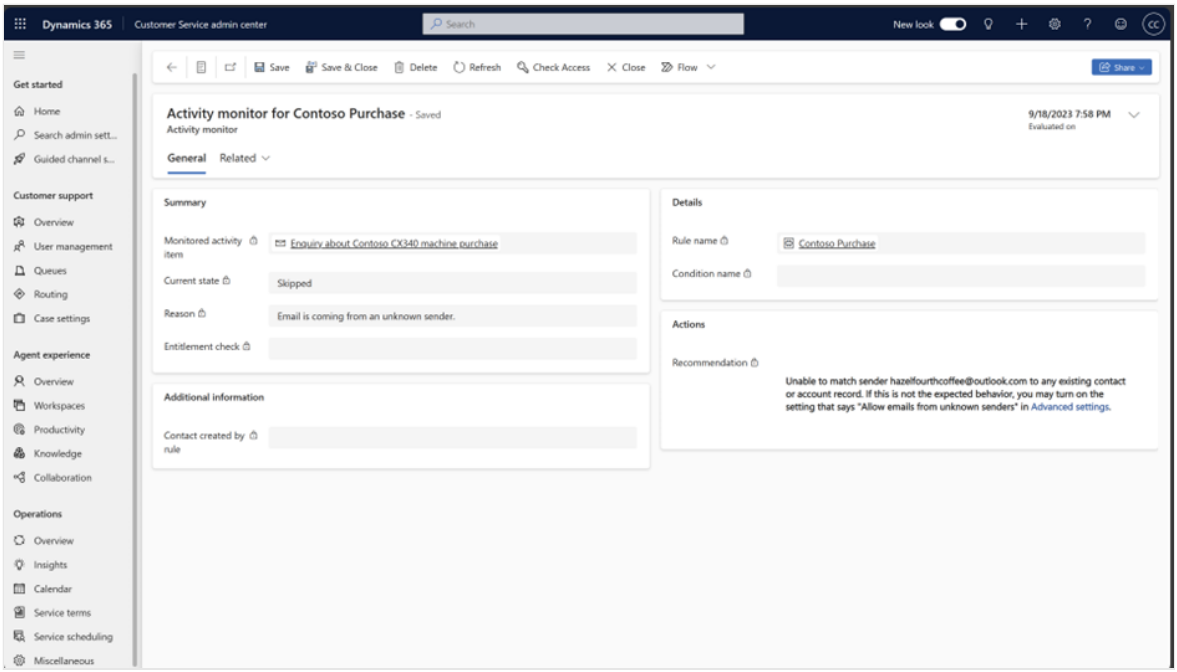
     > ⓘ **Note**
     >
     > The text in the **Recommendation** field doesn't display hyperlinks. Select the activity record to see the hyperlinks in the recommended resolution in the **Activity monitor** page.

   - **Evaluated on:** Displays the date and time of the issue.

3. Select a rule or activity to view the activity monitoring summary that is displayed on the **Activity monitor** <rule_name> page.

- If you navigate to an active rule from the activity monitor page, a message appears stating that the rule is active and therefore is read-only.

- The legacy rules will also be monitored and listed on the activity monitor view.



4. If you don't want to monitor any of the following states, you can clear the selection on the **Monitor options** dialog.

    - Ready for Power Automate / workflow
    - Failed
    - Skipped

See also

Automatically create or update records

Set up rules to automatically create or update records in the legacy app

Article • 08/03/2023

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

Every organization has multiple applications to capture customer interactions. The ability to channel external data into Microsoft Dataverse records can significantly improve the efficiency of your sales, marketing, and service teams, and increase the quality of your data. You can now direct this data from various applications and external sources into Dataverse with the help of *record creation and update rules*.

By using record creation and update rules in Dynamics 365 Customer Service, you can automatically create or update system or custom records from incoming activities, such as emails, social activities, or custom activities, without writing any code. For information on supported activities and entities, go to Activities and entities supported by rules for creating or updating records automatically. You can also set up the rule to convert the incoming activity into multiple records. For example, you can create a case and a lead from a single social activity.

A record creation and update rule consists of rule items that define the conditions for creating or updating records, and also defines what actions or steps to take on the newly-created records. The rule also contains channel properties that are used to define conditions for rules, and also for setting properties of the record you're creating or updating.

To enable the rule to update records, you must add an **Update** step to the rule. Only the entity that you select in the **Update** step is updated based on the properties you set.

Capture data from external sources

You can also capture more valuable customer information provided by an external application in the form of JSON (a collection of name-value pairs), and use it to enhance the quality of the target records and set various conditions in the record creation and update rules.

Every default (out-of-the-box) activity or custom activity has an Additional Parameters attribute. This attribute stores the JSON payload received from an external application.

To capture this information in Dataverse, you can define channel properties and associate them with a particular rule or share them across multiple rules of the same source type. For example, along with a social post, you can capture important information about the post, such as sentiment value. Sentiment value is the property of social activity, so you can use this property in any other record creation and update rule of type Social Activity.

Here's the correct format in which Dataverse should receive the JSON payload (data received as a name-value pair in JSON format) from the external application:

{"PropertyName1":"Propertyvalue1"; "PropertyName2":"Propertyvalue2"}

> **Note**
>
> Any configuration done in the channel properties is only valid if those name-value pairs exist in the JSON payload. Also, you must only use parameters received from the external application in the rule item conditions and as record properties.

Activate or deactivate a rule

For any record creation and update rule to apply to a matching incoming activity, after you add the rule items, you must activate the rule.

When a record creation and update rule is activated, a corresponding workflow is created automatically. You can use channel properties to define a workflow's conditions and operators in mapping the target entity attribute values. For complex scenarios, you may configure child workflows.

More information: Configure workflow steps

How do record creation and update rules work with queues?

In a record creation and update rule, when you specify a queue for a source type, any incoming activity from that source is added as a queue item for that specified queue. That is, if a rule for a particular source activity and queue combination is active, the rule processes the incoming activity on that queue to create or update records.

For an email source type, specifying a queue is mandatory. For all other source types including custom activities, it is optional.

> ⓘ **Note**
>
> When an automatic record creation (ARC) rule is applied to an Email queue item, it gets deactivated.

Rules in solutions

The record creation and update rules can be packaged as a part of Dataverse solution. Customizers and developers distribute solutions so organizations can use Dataverse to install and uninstall the business functionality defined by the solution.

Keep the following things in mind about using rules in solutions:

- Any rule that you created in Dynamics CRM Online 2015 Update 1 or later can't be exported to a previous release.
- Any rules upgraded to and edited in Dynamics CRM Online 2015 Update 1 or later can't be exported back to an earlier release.

Prerequisites

Before you can use automatic record creation rules, be sure your external application/social engagement system is already integrated with your Dataverse instance.

If your instance meets the prerequisites, all you need to do is set up rules in Dataverse that will automatically create or update a support case, lead, opportunity, appointment, task, and more from incoming activities.

Set up a rule to create and update records automatically in the legacy app

1. Make sure that you have the customer service, sales manager, or marketing manager role or equivalent permissions.

   ### Check your security role

- Follow the steps in View your user profile.
- Don't have the correct permissions? Contact your system administrator.

2. go to **Settings** > **Service Management**
3. Select **Automatic Record Creation and Update Rules**.
4. To create a record creation and update rule, select **New**.

   -OR-

   To edit an existing rule, in the list of rules, select and open the rule you want to edit.
5. Type or modify information in the fields.

   Hover over the field labels to see what to enter:

   - **Name**. Type the name of the rule.
   - **Source Type**. From the drop-down list, select the activity that's the source of the record.
   - **Queue**. Select the queue the rule applies to. Incoming activity arrives in the queue, and then the valid rule and rule item applies for creation or update of records.

     Here are a few things to consider:

     - For all activities and custom activities, except email, specifying a queue is optional. For all such activities you can have only one rule with an associated queue and one rule without an associated queue active at any given time. For example, for a Social Activity source type, you can have two active rules, one with a queue specified, and one without a queue.
     - If you selected Email as the source type for this rule, you can't activate the rule unless you select a queue.

     > **Note**
     >
     > You can associate only one rule per source type to a specific queue. For example: If you're creating a rule to convert an email to a case, make sure you specify an email address for this queue. Otherwise, automatic

record creation for email won't work. More information: **Create or change a queue**

6. Select **Save**.

Set Channel Properties

1. Under **Channel Properties**, in the **Additional Properties** box, select a channel property group.

> ⓘ **Note**
>
> When you select a property group for a record creation and update rule, you can use the channel property group's property items in the rule item conditions or while setting properties for the target record. After you activate a rule, you can't remove or change the selected property group. You can select another property group only after you remove the referenced property items of the previous property group from the rule items. When you try to select a new property group without removing the property references of the previous property group, you'll see an error.

To learn more about creating channel property groups and adding properties to them, see Set up channel properties later in this topic.

Set Email conditions

If the source type for the rule is set to **Email**, specify the conditions for converting the email to the target record.

1. **Create records for email from unknown senders**. If you select this check box, all email messages from unknown senders (a sender whose email address isn't present in any records) are converted to new records (based on the conditions you define). A contact record is also created for this unknown sender.

> ⓘ **Note**
>
> Dataverse determines what record to create based on the entity you select in the **Create Record** step under **Actions**.

If you don’t select this check box, records are created only for email messages that have a contact or account as the senders.

This option, in conjunction with the **Automatically create records in Dynamics 365 for Customer Engagement** option in the rule owner's Personal Options, determines whether a case and contact record is created (see Set personal options).

2. **Create case if a valid entitlement exists for the customer**. If you select this check box, a case is created only if an active entitlement exists for the customer.

   If the sender of the email is a contact with a parent account, a record is created if the contact’s parent account has a valid entitlement, and the contact is listed in the **Contacts** section of the entitlement or if the **Contacts** section is empty (which means the entitlement is applicable to all contacts for the customer).

3. **Create cases for activities associated with a resolved case**. If you select this check box, a case is created if the email is related to a resolved case. If the email is related to an active case, a new case won’t be created. However, if the email is related to a canceled case, a new case will be created.

4. **Create case when the case associated with the activity is resolved since**. If you select the **Create cases for activities associated with a resolved case** check box, select the duration here. A case is created only if the case is resolved earlier than the duration you specify. If the incoming email is related to a case resolved later than the specified duration, the incoming email is associated with the existing resolved case; a new case won’t be created. The resolved case won't be re-opened automatically when the incoming email is associated with it. However, you can configure flows using Power Automate, to re-open a resolved case when an incoming email is associated with the resolved case.

5. **Send automatic email response to customer on record creation**. Select this check box if you want to automatically send email responses to the sender of the email after a target record for the email is created.

6. **Select email template to respond to customer.** If you select the **Send automatic email response to customer on record creation** check box, select an email template (global email template or email template of any entity type). If you don’t select a template, an automatic response won’t be sent.

   > ⓘ **Note**

When mapping incoming email to a field that does not support HTML, you should remove HTML content from the email, so that the text is compatible with Dynamics and the content can be viewed without HTML tags. You can do this in the following ways.

1. Use a regular expression such as <[^>]*> to filter the HTML tags out of the email before mapping it to the field. Note that taking this approach will permanently remove the tags from the content.
2. If you want to maintain the HTML from the email, but don't want it to be displayed, customize the field CSS to use the textContent DOM node to have the browser only display the text from the email in the form.

Please note that these customizations are not supported by Microsoft. Try them on your sandbox environment to avoid any loss of production data.

Set Social Activity conditions

If the source type for the rule is set to Social Activity, specify the conditions for converting the social activity to the target record.

1. **Create records for blocked social profile**. If you select this check box, a target record is created or updated for the social posts (social activities) from social profiles that are blocked by you.

   > ⓘ **Note**
   >
   > Social posts appear in the application as social activities.

2. **Create records for direct messages only**. If you select this check box, the target record is created only when the social posts are sent as direct or private messages. If you clear the check box, records are created for all social posts including public messages (timeline).

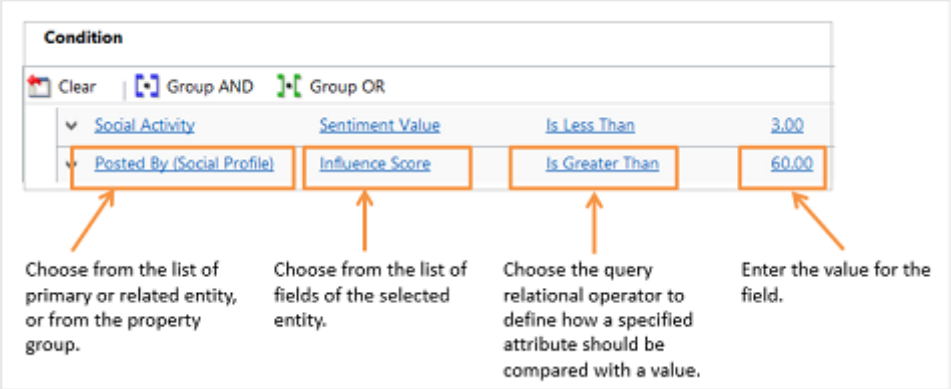
   > ⓘ **Note**
   >
   > Dataverse determines what record to create based on the entity you select in the **Create Record** step under **Actions**.

Set record creation details

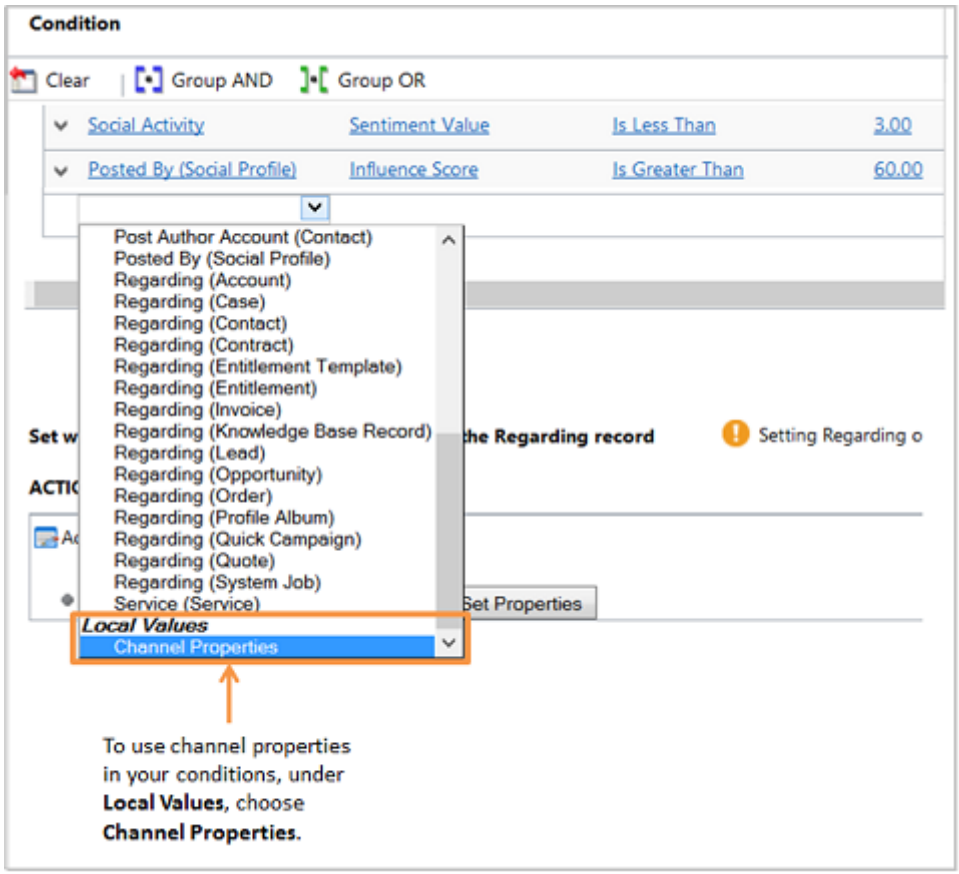
In the **Specify Record Creation and Update Details** section, select ➕ to define the conditions for creating or updating a record and specify the properties of the record.

1. In the **Name** box, enter a meaningful name for the rule item.
2. In the **Conditions** section, select the record, channel properties, fields, and relational query operators to specify when a target record should be created or updated.

   For example, to create a record from a social post (social activity) with a sentiment value of less than 3, an influence score greater than 60, and hashtags containing SilverCreditCard, you can add the following conditions:



> ⓘ **Note**
>
> You can also use channel properties in your conditions.



Here's the rule item after you add all the conditions:

3. Add steps to create or update records for the incoming activity that matches the conditions you defined earlier.

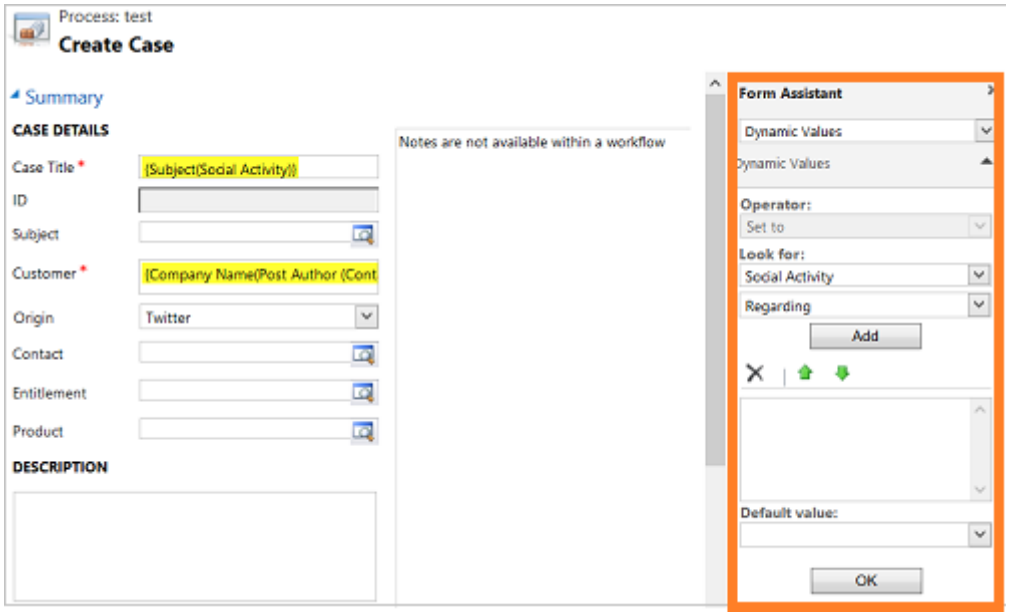
   a. Under **Actions**, select **Add Step** > **Create record**.

   b. In the **Create** box, select the record type for the record you want to create from the incoming activity. For example, if you want to create a case from the social activity, select **Case**.

> ⓘ Note
>
> If the incoming activity has a regarding object set, and if the regarding object entity and the entity selected in the **Create Record** step aren't the same, no workflow is applied and the actions defined in the rule are not executed.

c. Select **Set Properties**.

The entity form is displayed. You can map the target entity fields to the social activity record data, including channel properties. Some of the mappings are available out of the box: Case title, Customer, and Origin (highlighted in yellow). The out-of-the-box mappings can be changed and new mappings can be added using the **Form Assistant** control.



The new record that is created will be automatically set as the regarding record of the incoming activity record. There is only one regarding object to the social activity, so, only one **Create** record action is possible in the **Actions** section.

d. To add more actions, under **Specify Other Actions**, select **Add Step** > <Action>. The available actions are: Create Record, Update Record, Send Email, or Start Child Workflow.

Learn more about each of these actions in Configure workflow steps.

4. Select **Save and Close**.

> ⓘ Note
>
> - Data types "Option Set" and "Two Option" are not supported in string type conditions.
> - The property items for each of the supported data types need to have a default value. This requirement is important in scenarios where the configured property line items have a blank incoming web request. In

such cases, the property line item will take the default value when referred to in a workflow.

Turn on the rule

Turn on the rule so that records can be created or updated for incoming activities based on the defined conditions. More information: Activate or deactivate a rule.

> **Tip**
>
> Developers can also apply rules retroactively to the incoming records that might have been skipped while a rule was edited.

Set up channel properties

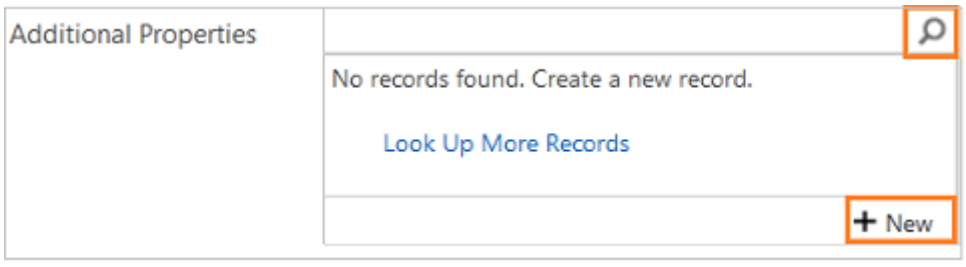
Every default or custom activity has an **Additional Parameters** attribute. This attribute stores the JSON payload received from an external application.

You can find these parameters in the **Additional Parameters** field of any incoming activity.

To capture this information in Dataverse and associate it with the record creation or update rule, you can define channel properties in a channel property group and associate them with a rule or share them across multiple rules. For example, along with a social post, you can capture important information about the post, such as rating or influencer score. Rating and influencer score are the properties of social channel.

Create channel property groups and add channel properties

1. After you save the record creation and update rule form, under **Channel Properties** section, in the **Additional Properties** box, select the lookup button, and then select **New**.



A channel property group form opens.

> **ⓘ Important**
>
> A property group record contains multiple property items.
>
> To fix this issue, first delete the properties from the conditions and steps that use the record, and then save or activate the rule.

2. Enter a meaningful name for the property group, so you can easily identify it while adding it to any record creation or update rule.
3. The **Source Type** field will be automatically set to the source type of the record creation and update rule.
4. Select **Save**.
5. In the **Channel Properties** section, select + to add in the group-specific channel properties.
6. In the **Channel Property** form, enter the following:

   a. **Name**. Type the property name as it appears in the activity's payload.

   > **ⓘ Note**
   >
   > The name can contain only alphanumeric and underscore characters and shouldn't be longer than 300 characters.

   To see properties received for an activity, go to **Sales** or **Service** or **Marketing** > **Activities**, and open the activity, and see the **Additional Parameters** field.

   > **ⓘ Note**
   >
   > This field isn't available on the activity form by default. A system customizer can add the field to the activity forms. The field will have the JSON payload only when the external application sends it for the activity.

> **Important**
>
> - Create a channel property for each name from the name-value pair that you want to use in your record creation and update rule. For example, you could use `influenceScore` as a property name.
> - The information in the JSON payload isn't very easy to read. To make it more readable, you can use online JSON parser that will provide a better output.
> - The property group doesn't support adding nested values in a JSON payload as channel properties. The following sample shows the "FollowersCount" under the user node as a nested JSON key-value pair.

b. **Data Type**. Select a data type for the channel property. For example, if the property is influence score, use the data type as Whole Number because its value can't be in decimals.

The selected data type will determine the relational query operators when you use the property to define conditions in the record creation and update rule items. Dataverse supports creating properties only of the following data types: Floating Point Number, Single Line of Text, and Whole Number.

> **Note**
>
> - Option Set and Two option data types are supported in conditions of type string. You'll have to type out the option set value in the conditions.
> - Dataverse sets a default value for property items for each of the supported data types. This is for scenarios when a channel property is

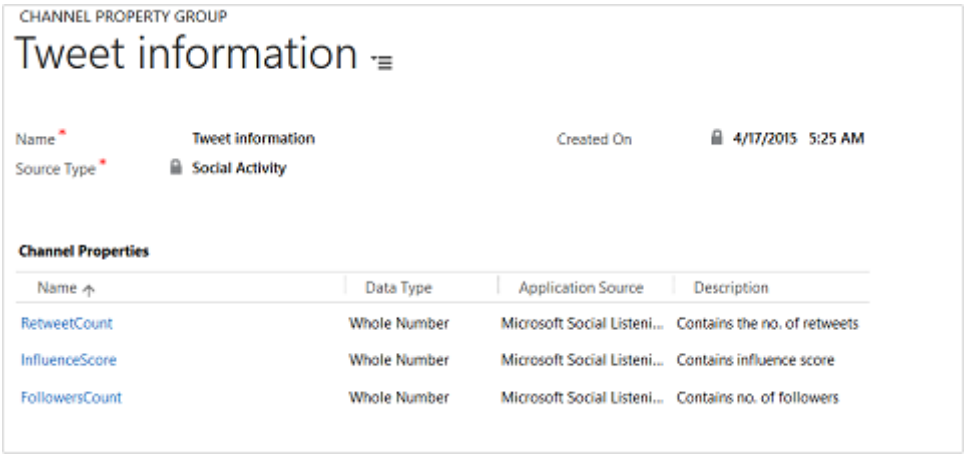
used in a workflow but the incoming payload has no value provided from the external channel; the workflow conditions in which the property is referred use a least the following default value: String: “”, Whole Number: -2,147,483,648, Float: -1e+011.

c. **Application Source**. Type the name of the application that this property is related to.

d. **Description**. Type details to further explain what the property is for.

7. When you’re done, select **Save & Close**.

   You can see all the properties in the channel property group form.



Activate a record creation and update rule

For any record creation and update rule to apply to a matching incoming activity, after you add the rule items, you must activate the rule.

To activate a record creation and update rule

1. Go to **Settings** > **Service Management**.
2. Select **Automatic Record Creation and Update Rules**.
3. Open the rule you want to activate, and on the command bar, select **Activate**.

> **Note**
>
> You can have two record creation and update rules active at a time for any source type, except email—one with queue and one without a queue. You can

have only one record creation and update rule active for the source type Email, and this rule should have a queue specified.

After the rule is active, the only way to change the rule is to first deactivate it. Open the rule, and on the command bar, select **Deactivate**.

Manage automatic record creation and update from a queue form

You can create or manage an automatic record creation and update rule from a queue form, too. To do this, open the queue record, and on the command bar, select **Email Activity Conversion Settings** or **Social Activity Conversion Settings**.

More information: Create or change a queue

Upgrade considerations

Here are a few things you should know if you're upgrading to the latest release, and have existing case creation rules for email and social activity.

Existing rules prior to upgrade	**What happens to the rules after upgrade?**
A rule that has rule items with conditions and properties defined	- The rule and rule items are upgraded and the properties and conditions in the existing rule items are preserved. - A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
A rule that has a rule items with conditions , but no properties defined	- The rule and rule items are upgraded and the conditions in rule items are preserved. - A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
A rule that has a rule items with no conditions or properties defined	- The rule and rule items are upgraded. - A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
A rule that has a rule items with properties, but no	- The rule and rule items are upgraded and the properties in the rule items are preserved.

Existing rules prior to upgrade	What happens to the rules after upgrade?
conditions defined	- A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
A rule with no rule items	- The rule is upgraded. - A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
An active case creation rule for social or email source types, with a queue specified	All such rules will be upgraded in an active state.
An active case creation rule for social or email source types, without a queue specified	All such rules will be upgraded and deactivated. This is because even in Dynamics CRM Online Spring '14, a case creation rule without a queue did not apply and create any record.

Recommendation to upgrade solution

Perform the following steps before you upgrade a solution:

1. Deactivate the Record Creation and Update Rules which are brought through the previous version of the solution. The state of Record Creation and Update Rules changes to draft.
2. Upgrade your solution as required.
3. After the successful upgrade of the solution, activate the Record Creation and Update Rules as required.

See also

Create rules to automatically route cases

Create or change a queue

Automatically create a case from an email in web client

Article • 09/29/2023

Reduce the need for manually creating cases from incoming emails and increase the efficiency of customer service agents by creating automatic case creation rules in Dynamics 365 Customer Service. The conditions in these rules automatically convert emails to support cases.

Prerequisites

- Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

  When a case creation rule is activated, a corresponding workflow is created automatically. If you create or assign a rule, you must have permissions to perform the same action on workflows. The case creation rule is applied and a case is created in context to the permissions that the owner of the case creation rule has.

- Check your security role
  - Follow the steps in View your user profile.
  - Don't have the correct permissions? Contact your system administrator.

Create cases automatically using rules

1. Go to **Settings** > **Service Management**.
2. Select **Automatic Case Creation Rules**.
3. To create a new case creation rule, select **New**.

   or

   To edit an existing rule, in the list of rules, select a rule, and then on the command bar, select **Edit**.
4. Type or modify information in the fields.
   - **Name**: Type the name of the queue the rule is defined for.

- **Source Type**: Select **Email** to indicate that cases will be created automatically from email messages.
- **Queue**: Select the queue that the rule applies to. For example, if you want to convert email messages and then send them to the Support queue, select that queue here.

  > ⓘ Note
  >
  > You can associate only one rule per source type to a specific queue. If you're creating a rule to convert an email to a case, make sure you specify an email address for this queue. Otherwise, automatic case creation for email won't work. More information: **Create and manage queues**

5. In the **Specify Conditions for Case Creation** section, select the conditions for creating the case automatically. You can add multiple conditions here and arrange them in the desired order. The conditions are considered in the same order. Only one item that has conditions matching the incoming email is applied.

Specify conditions for email to case creation

a. **Create cases for email from unknown senders**: If you select this checkbox, all email messages from unknown senders (senders whose email addresses aren't present in Dynamics 365) are converted to cases. A contact record is also created for the unknown senders.

> ⓘ Note
>
> If this option isn't selected, cases are created only for email messages that have a contact or account as the senders. Email messages from senders that are present as other record types won't be converted to cases.

This option, in conjunction with the **Automatically create records in Microsoft Dynamics 365** option in the rule owner's Personal Options, determines whether a case and contact record is created (see Set personal options):

This table shows if a contact and case record is created based on the values set for the **Automatically create records in Microsoft Dynamics 365** field in Personal Options and the **Create cases for email from unknown senders** checkbox in the automatic case creation rule:

"Automatically create records in Dynamics 365 for Customer Engagement" option is set to:	If "Create case from unknown sender" option in this rule is set to:	Contact or case created?
Create Lead	Selected	Both, contact and case, created
Create Lead	Not selected	None
Create Contact	Selected	Both, contact and case, created
Create Contact	Not selected	Only contact created
None	Selected	Both, contact and case, created
None	Not selected	None

b. **Create case if a valid entitlement exists for the customer**: If you select this checkbox, the application creates a case only if an active entitlement exists for the customer.

   If the sender of the email is a contact with a parent account, the application creates a case if the contact's parent account has a valid entitlement and the contact is listed in the **Contacts** section of the entitlement or if the **Contacts** section is empty (which means the entitlement is applicable to all contacts for the customer).

c. **Create cases for activities associated with a resolved case**: If you select this checkbox, the application creates a case if the email is related to a resolved case. If the email is related to an active case, a new case won't be created.

d. **Create case when the case associated with the activity is resolved since**: If you select the **Create cases for activities associated with a resolved case** checkbox, select the duration here. The application creates a case only if the case is resolved earlier than the duration you specify. If the incoming email is related to a case resolved later than the specified duration, the application only associates the incoming email with the existing resolved case; a new case won't be created.

e. Under **Specify Autoresponse Settings**, select the **Send automatic email response to customer on case creation** checkbox if you want to automatically

send email responses to the sender of the email after a case for the email is created.

Select email template to respond to customer: If you select the **Send automatic email response to customer on case creation** checkbox, select an email template (global email template or email template of case entity type). If you don't select a template, an automatic response won't be sent.

6. Select **Save**.

7. In the **Specify Case Details** section, define the conditions for creating a case and specify the case properties.

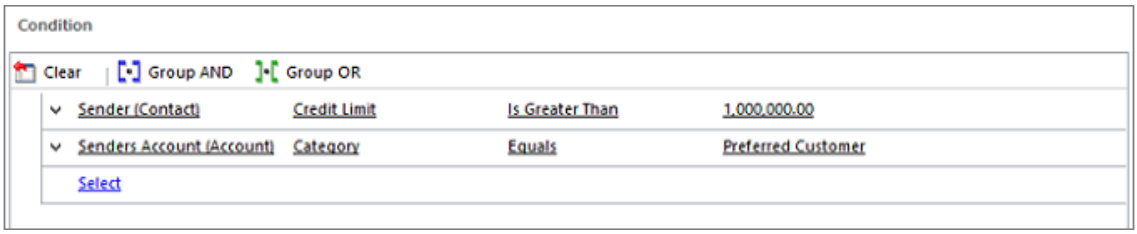
   By default, the **Title** field of the new case is set to the subject of the email and the **Customer** field is set to the sender of the email. If the sender of the email is a contact with a parent account, the **Customer** field is set to the parent account, and the **Contact** field is set to the sender of the email.

Specify case details

a. In the **Specify Case Details** section, select +, define the conditions for creating a case and specify the case properties.

b. In the **Conditions** section, specify when the case should be created.

   Here's how:



c. In the **Case Properties** section, set the properties for the case. The following example shows how to set the priority of all the automatically created cases to **High**:

   Once a case is created, the incoming email is removed from the queue.

> ⓘ Note

If there isn't a routing rule that routes the newly created case to another user or queue, the user who's the owner of the case creation rule will be set as the owner of the case, too.

Activate or deactivate a case creation rule

Cases are created automatically only when the case creation rule is active. To activate a rule, open it, and then on the command bar, select **Activate**.

Once the rule is active, you can't change it. To change a rule, open the rule and on the command bar, select **Deactivate**. You can then edit the rule.

Manage automatic case creation from a queue form

You can create or manage an automatic case creation rule from a queue form, too. To do this, open the queue record, and then on the command bar, select **Email to Case Settings**.

See also

Automatically route cases using routing rule sets
Create and manage queues

Create a new case when email subject changes

Article • 10/18/2023

When the email subject on a replied email changes, it doesn't create a new case in Dynamics 365. Administrators can use regex expressions to define whether a new case should be created when the email subject changes on a reply or a forwarded email that has a related active or resolved case.

When a customer replies to an email after modifying or removing the content in the subject, a new case isn't created in Dynamics 365. This behavior happens because the InReplyTo value of the replied email matches with the messageID of the previous email that's already in Dynamics 365. An email correlation is created, and the case associated with the previous email is linked with the replied email. As a result, the automatic record creation and update rule skips the case creation, even if the subject changes.

This topic describes the customization steps that you can perform to create a new case when email subject changes.

Prerequisites

Make sure to enable "Skipped" and "Ready for Power automate" monitored options for activity monitor in the Customer Service admin center app.

How it works

A new default Boolean field, named correlatedsubjectchanged, is available for the email entity. The field is populated as true or false for inreplyto-correlated emails, and detects changes in the subject field of the email. A default regex is available that ignores the prefixes "Re: ", "re: ", or "RE: " in the replied email, and then compares the subject with the correlated email's subject. If the subject matches, the boolean value, correlatedsubjectchanged, is set to false. However, the default regex doesn't ignore the prefixes "Fw: ", "FW: ", or "FWD: in the forwarded email, so the boolean value, correlatedsubjectchanged, is set to true in these cases, and if an email is forwarded, a new case is created. You can customize the default regex if it doesn't match your requirements. You can write regex expressions for multiple languages. For more information, go to: Regular Expression Language - Quick Reference. To edit the regex, use the OrgDbOrgSetting tool and follow the guidance.

Customization steps to create a new case

To define whether automatic record creation and update rules must create a new case, you can add a condition to check if the correlatedsubjectchanged field is true and create a case by performing the customization steps:

1. Go to https://make.powerautomate.com/ and select the environment in which you have automatic record creation and update rules configured.
2. Navigate to **My flows** from the site map, and then select **+New flow** > **Automated Cloud flow**.

   If using custom roles, the owner of the flow must have read/write/delete privileges to the activity monitor entity. The CSR manager and system administrator roles have the required privileges by default.
3. Name to flow, and then select the **When a row is added, modified or deleted** trigger.
4. Select **Create**.
5. Create a custom flow that is triggered when case creation is skipped for an email and there's an entry in the activity monitor table with the **Skipped** state.
6. Check for the email subject change within the flow and execute automatic record creation and update rules child flow to create the case.

   a. On step 3, select the following values for the fields:

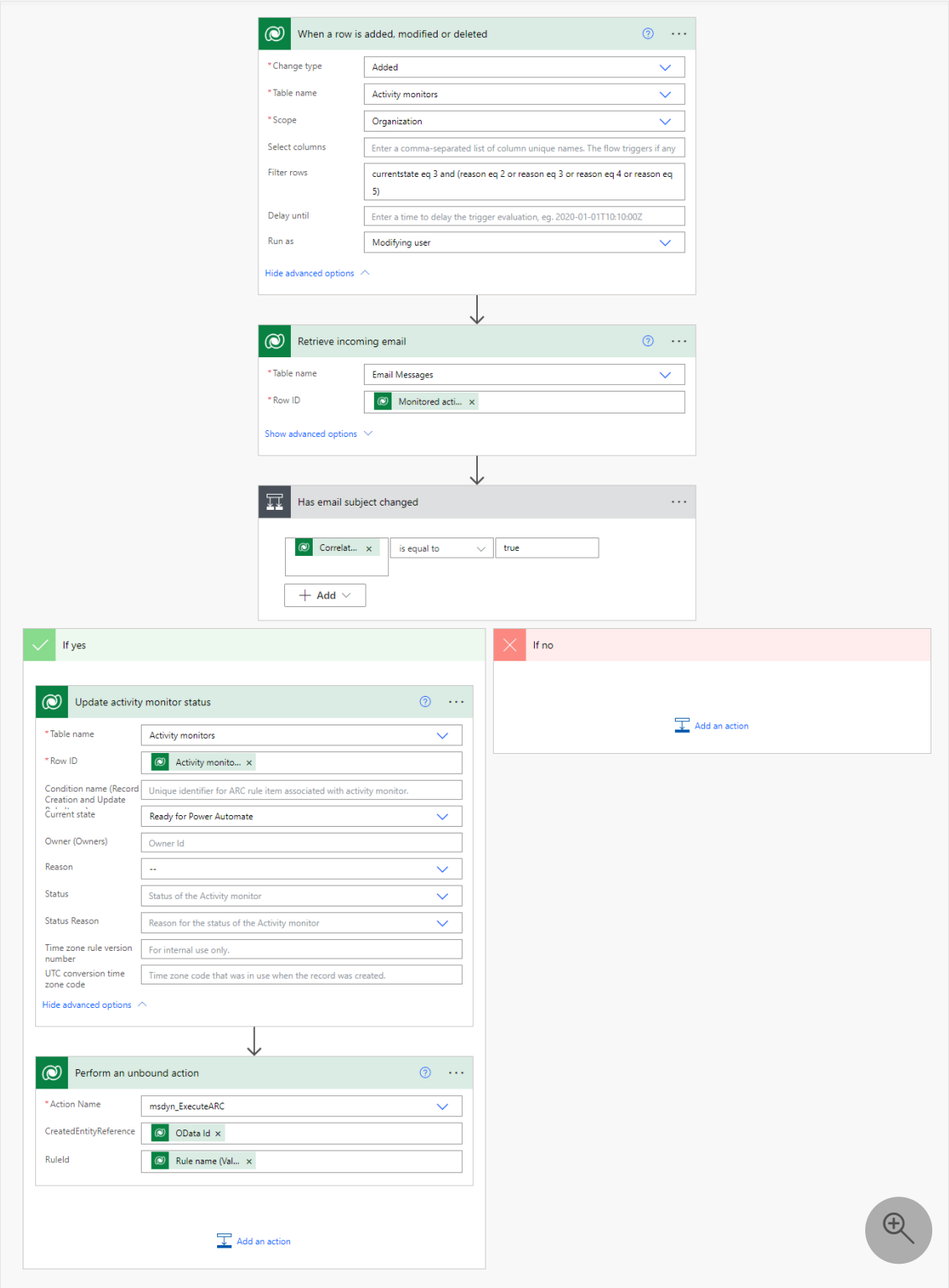
   - Change type: **Added**
   - Table name: **Activity monitors**
   - Scope: **Organizations**
   - Run as: **Modifying user**
   - Filter rows: The reason can be adjusted according to your business requirements. For example, currentstate eq 3 refers to the **Skipped** activity monitor state, and the reason can be any of the following:
     - An existing entity is already connected with this record.
     - An active case is already connected with this record.
     - A resolved case is already connected with this record.
     - The rule requires a connected case to be resolved for a specific amount of time before creating a new one. This connected case has been resolved for less than the amount of time selected.

   b. Retrieve the email record. Enter **RowID** as **Monitored activity item (Value)**.

c. Add a conditional check to verify whether the correlatedsubjectchanged attribute is set to true and proceed only if yes; otherwise, terminate. If you have complex conditional logic, we recommend that you write your logic in an unbound custom action that gives certain simple structured output, such as Boolean. Check the Boolean value and define case creation based on condition.

d. Update the activity monitor status. If the correlatedsubjectchanged attribute is set to true from step 6c (subject doesn't match), update the current state of that activity monitor ID to **Ready for Power Automate**, and then set the **Reason** to **blank**.

e. Continue executing automatic record creation and update rules and create case. Perform an unbound action and add the fields as shown in the screenshot.



By performing the steps, the automatic record creation and update rule can be conditionally bypassed (based on email subject change condition) and a new case can be created.

Overview of service-level agreements

Article • 06/24/2022

Service-level agreements (SLAs) enable businesses to track support policies and ensure customers are being supported per the support policy to which they are entitled. Businesses use SLAs to govern support products that customers either receive as part of their purchase or add on to their purchase. What SLAs include are policy details such as how quickly a customer is entitled to receive support, how many support requests a customer can make, and how long after purchases a customer can be supported as part of the agreement.

You can define the level of service or support that your organization agrees to offer to a customer by using SLAs in Dynamics 365 Customer Service. Providing support based on service levels ensures that you're delivering measured and predictable service.

You can associate an SLA with an entitlement, so that when an entitlement is added to a case, the associated SLA is also applied. You can only associate SLAs that are created for the Case entity with entitlements. More information: Create entitlements to define support terms

You can also enable SLAs for entities other than case. More information: Enable entities for service level agreements

Alternatively, you can set up a default SLA for the organization. More information: Set a default SLA

Benefits of service-level agreements

Tracking

- After you've configured the SLA KPIs, SLAs, and SLA items for an entity, you can add the SLA Timer control to display the SLA KPIs that are configured for the entity. You can customize the views to filter the KPIs and display only the relevant KPIs to agents. More information: Add a timer control for SLA-enabled entities This helps agents monitor their service level performance and meet their service level goals.
- You can create SLA KPIs with target times by setting up customer holiday schedules or customer service schedules to calculate business hours to be considered during time calculation.

- You can also enable recalculation of SLAs, providing agents with sufficient time to work on their services. More information: Enable recalculation of SLAs on reaching terminal status

Prioritization

You can define the set of conditions based on which KPIs are applied to a case, or the set of actions to take as a warning or in case of an SLA breach. More information: Manage service configuration settings

Reminders

You can include detailed items to define metrics or key performance indicators (KPIs) to attain that service level. SLA KPIs help you get timely warnings about any issues your customer support team might be having. More information: Create SLA KPIs

Features of service-level agreements

Configure SLAs

Configuring SLAs includes the process of creating SLA KPIs, SLAs, and then applying the SLAs that you have created.

Create SLA KPIs

Creating KPIs for your SLAs helps define the success, failure, or warning criteria for your SLAs. KPIs also include performance metrics such as the response and resolution time, which help define whether the scope of services to be covered was met or breached. More information: Create SLA KPIs

Create SLAs

After you have created the SLA KPIs, you can create SLAs from the Customer Service admin center or Customer Service Hub app. Creating an SLA includes creating an SLA and SLA item, configuring actions for the SLA item, and then activating the SLA. More information: Create SLAs

Apply SLAs

As a final step, you can apply SLAs automatically, manually, through entitlements, or by setting up a default SLA. More information: Apply SLAs

Implement and manage SLAs

After you have configured and applied your SLAs, you can manage the various aspects of your SLA.

Export and import a solution with SLAs

- You can export and import a solution with SLAs to another environment without having to create SLAs in the new environment all over again. More information: Export and import a solution with SLAs
- Additionally, you can export or import a calendar with SLAs. SLA items will automatically be linked to the corresponding imported calendars on import. More information: Export or import a calendar with SLAs

Calculate SLA KPIs

- You can manage the calculation of SLA KPIs. You can enable the recalculation of SLA KPIs that reach the terminal status in the Customer Service admin center or Customer Service Hub app. More information: Enable recalculation of SLAs on reaching terminal status.

- Additionally, you can enable the custom time calculation and custom recalculation of SLA KPIs. More information: Enable custom time calculation of SLA KPIs and Enable custom recalculation of SLA KPIs

Create and manage customer service and holiday schedules

- You can create customer service schedules and define the work hours to determine the support team's availability to provide support to customers. More information: Create customer service schedule and define the work hours
- You can create and manage holiday schedules and any changes that occur to the schedules as well. This helps avoid any issues with your SLA in cases where your service organization has a holiday. More information: Create and manage holiday schedules

Add a timer control to an SLA-enabled entity form and customize the SLA timer control display label

- To help your service organization manage the current status and the time remaining for the configured SLA KPIs, you can add a timer control to an SLA-enabled entity form. More information: Add a timer control for SLA-enabled entities.
- Additionally, you can customize the SLA timer control display label according to the needs of your organization. More information: Customize the SLA timer control display label

See also

Troubleshoot issues in SLAs

Enable entities for service level agreements

Article • 08/29/2023

Service level agreements are not just important in the customer service space, but also for sales and marketing to ensure efficient handling of leads from start to finish.

> **Important**
>
> Only enhanced SLAs can be created for other entities. A standard SLA can be created only for the Case entity.

Entities (record types) that support SLAs

With Customer Service, you can create enhanced SLAs for entities that are enabled for SLA. A system administrator or customizer can enable SLAs for the following entities:

- Account
- Contact
- Order
- Invoice
- Quote
- Opportunity
- Lead
- Activity entities such as Email, PhoneCall, and Appointment—but not RecurringAppointment or its instances.

  > **Note**
  >
  > SLAs can also be enabled for custom entities and custom activities.

To enable an entity for SLA

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   ### Check your security role

   - Follow the steps in View your user profile.

2. Go to **Settings** > **Customizations**.
3. Select **Customize the System**.
4. In the solution explorer, in the left navigation pane, select the entity that you want to enable for SLA.
5. Under **Communication & Collaboration**, select the **Enable for SLA** check box.
6. Select **Save**.
7. Select **Publish**.

> **Note**
>
> - You can have active SLAs for a maximum of seven entities.
> - We recommend that you have a maximum of five SLA KPIs per entity.
> - You can have a maximum of 100 SLA items per SLA entity, however we recommend that you have less than 15 SLA items per SLA entity.

Next steps

Configure service level agreements

Create customer service schedule and define the work hours

Article • 05/24/2023

To define when your service or support team is available for providing support to customers, create a customer service schedule in Dynamics 365 Customer Service. A customer service schedule determines the business hours for each day in a week and also the weekly off. Customer Service uses these details for time tracking of service-level agreements (SLAs).

For SLA time tracking, make sure you add a holiday schedule to the customer service schedule, and associate this customer service schedule to the SLA record.

You can create the service schedule and define work hours in Dynamics 365 Customer Engagement (on-premises) 9.1 also. More information: New features in Dynamics 365 Customer Engagement (on-premises)

> **Note**
>
> With the latest release of Dynamics 365 Customer Service app, customer service schedule in service management is available in the Customer Service Hub. We recommend that you create and manage customer service schedule using the new experience.

Create a customer service schedule

1. Make sure that you assign the Customer Service Manager, System Administrator, System Customizer security role, or equivalent permissions at the user level only.

   ### Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Navigate to the Customer Service admin center or Customer Service Hub app, and perform the following steps:

   Customer Service admin center

a. In the site map, select **Calendar** in **Operations**. The **Calendar** page appears.

b. In the **Customer service calendar** section, select **Manage**.

The **All Customer Service Calendars** view is displayed. You can switch between various system views using the drop-down list.

3. To create a customer service schedule, select **New**.

   To edit an existing schedule, select the schedule in the list of records, and then select **Edit** on the command bar.

4. In the **Name** field of the **Create Customer Service Schedule** dialog, enter a meaningful name for the schedule such as “APAC Customer Schedule", and then select **Create**.

5. In the **Weekly Schedule** dialog, follow these steps:

   a. For work hours, select one of these options:

   - **Are the same each day**: The schedule is the same for every day of the week. After you select this option, to select the days of the week that the customer support is available, select **Set Work Hours**.

     To set the work hours for the days, select **Set Work Hours**. For more information, see Define work hours for the customer service schedule.

   - **Vary by day**: The new schedule is different for one or more days of the week. After you select this option, select the days of the week that the customer support is available, and also specify the work hours for each day.

   - **24 x 7 support**: The customer support is available 24 hours a day and all days of the week.

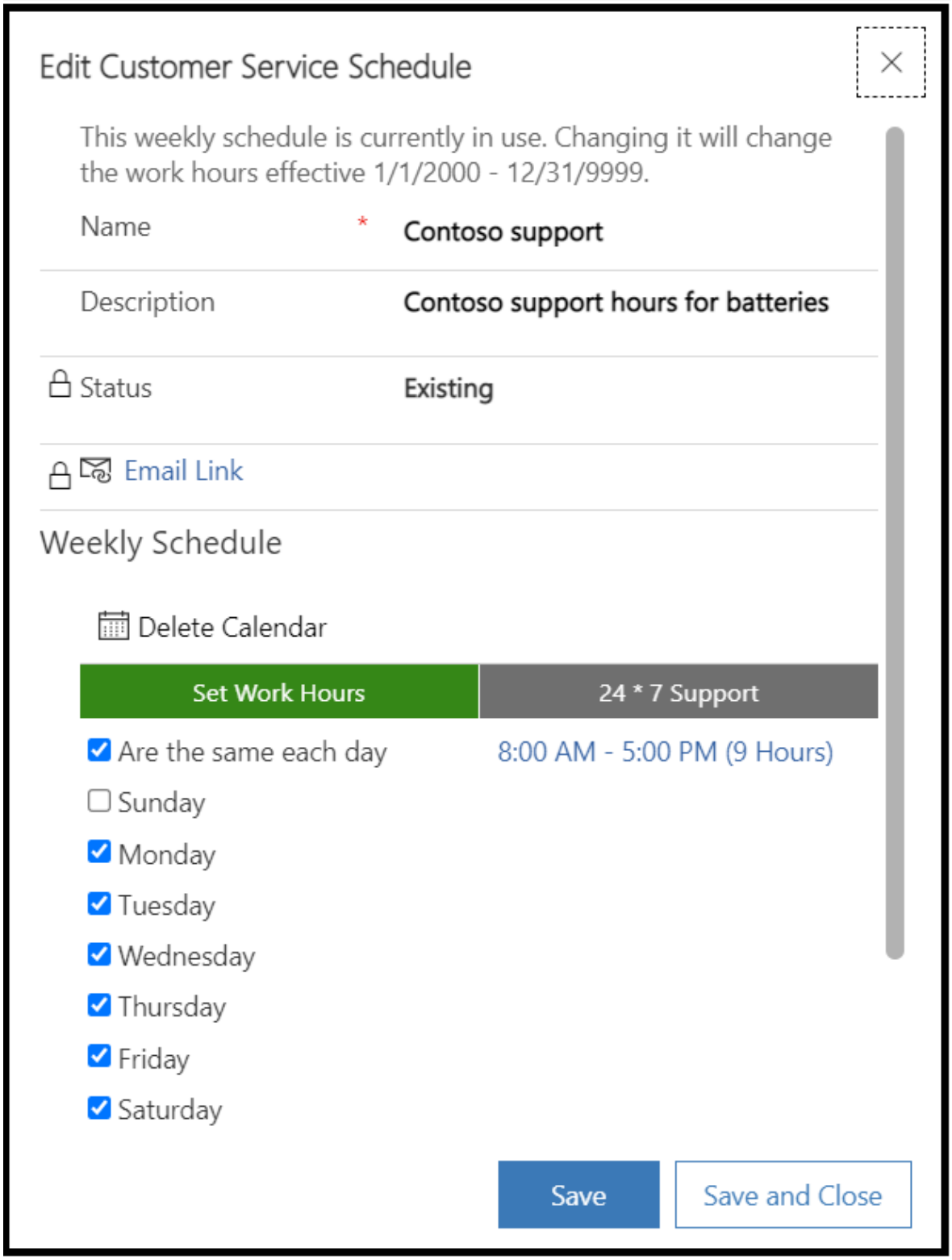
   b. For **Work Days**, select the checkbox for each day that the customer support resources will be available and working.

   c. For **Holiday Schedule**, select **Observe** to specify when your service organization will be closed.

   If you selected **Observe**, select a holiday schedule from the lookup box. More information:Set up a holiday schedule

6. In the **Time Zone** dropdown box, under **Select the time zone**, select the time zone in which your customer support resources will work. If applicable, the daylight saving time is taken into account for the selected time zone.

7. Select **Save**.



Define the work hours for the schedule

In the **Set Work Hours** dialog, complete the following fields, and then select **OK**.

- **Start**: Select the time the work day starts.
- **End**: Select the time the work day ends.

  To add a break in the work hours, like a lunch break, select **Add Break**, and then select the start and end time of the break.

See also

Set up a holiday schedule

Create and manage holiday schedules

Article • 09/21/2022

Avoid having your service level agreements (SLAs) affected when your service organization is closed by creating a holiday schedule and adding it to your service calendar.

For example, if your service organization has an SLA to reply to email cases within two business days, you can create a holiday schedule and add it to your service calendar. Then, if a customer submits an email case on that holiday, your SLA is clear and is not affected by the holiday closure.

> **Note**
>
> With the latest release of Dynamics 365 Customer Service app, holiday schedule in service management is available in the Customer Service Hub. We recommend that you create and manage holiday schedules using the new experience.

Create a holiday schedule

You can create a holiday schedule in the Customer Service admin center or Customer Service Hub app

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.
   - Follow the steps in View your user profile. Don't have the correct permissions? Contact your system administrator.
2. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Calendar** in **Operations**. The **Calendar** page appears.

   b. In the **Holiday calendar** section, select **Manage**.

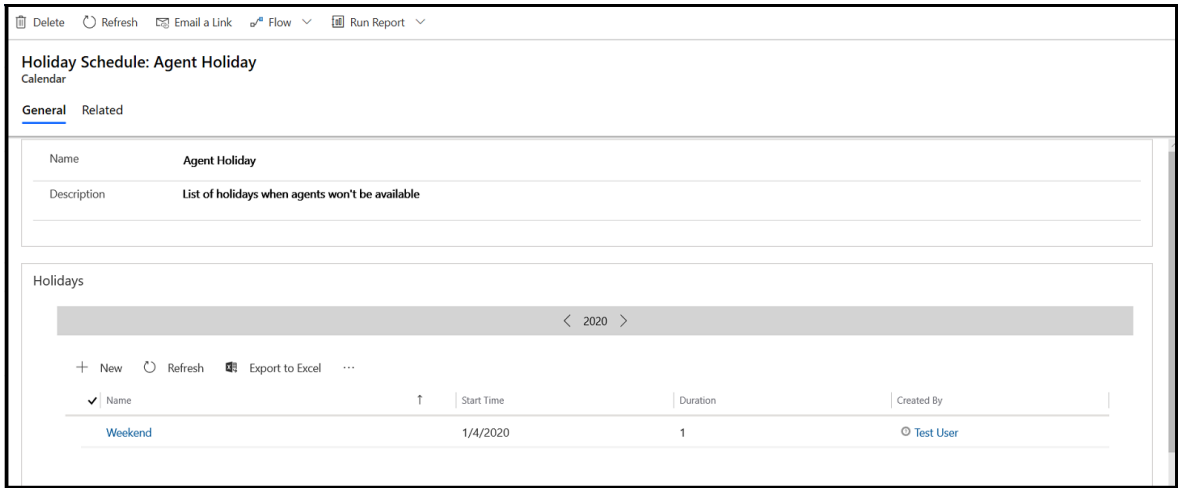
   The **All Holiday Schedules** view is displayed. You can switch between various system views using the dropdown list.

3. Select **New** and in the **Create Holiday Schedule** dialog box, enter a name and description for the holiday, and then select **Create**.

4. When the holiday opens, select **New** in the **Holidays** grid to add the holiday to your customer service calendar.

5. In the **Add Holiday** dialog box, specify the **Name**, **Start Date**, **End Date**, and **Duration** of the holiday, and then select **OK**.

   The holiday is created and associated with your customer service calendar. After the customer service schedule is associated with an SLA, then your SLA during business hours is not affected. More information: Define service level agreements



To resolve any issues with the SLA during holidays, see SLA timer does not pause when its state is changed from InProgress to OnHold on a holiday.

Create a holiday schedule (Customer Service app)

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   - Follow the steps in View your user profile. Don't have the correct permissions? Contact your system administrator.

2. go to **Settings** > **Service Management**

3. Select **Holiday Schedule**.

4. Select **New** and in the **Create Holiday Schedule** dialog box, enter a name and description for the holiday, and then select **Create**.

5. In the list of holidays, select the holiday you created.

6. When the holiday is open, select **New** to add the holiday to your customer service calendar.

7. In the **Add a Holiday** dialog box, specify the name and select the time of the holiday, and then select **OK**.

   The holiday is created and associated with your customer service calendar. After the customer service schedule is associated to an SLA, then your SLA during business hours is not affected. More information: Configure service-level agreements

Additional actions

- To edit an existing holiday schedule, go to **Service Management** > **Holiday Schedule**. The **All Holiday Schedules** view is displayed. Select the holiday schedule you want to edit from the list of holiday schedules and select **Edit** in the command bar.
  - You can edit the **Name** or **Description**, or add new holidays for the holiday schedule.
  - By default, all the holidays of the current year are displayed. To switch to a different year, select and type the year in the **Holidays** grid:

- To print a holiday schedule, select **Print Preview** in the **Holidays** section of the holiday schedule.

- To import or export a holiday schedule, use the Calendar import or export feature as you can't import or export a holiday schedule in the Excel format.

See also

Create a customer service schedule and define the work hours

Manage changes to customer service and holiday schedules of existing SLA KPIs

Article • 05/11/2022

Introduction

This topic describes how you can manage changes to the customer service and holiday schedules of your existing service-level agreements (SLA) key performance indicators (KPIs).

Understand time calculation of SLA KPIs

To manage changes to the customer service and holiday schedules of your SLA KPIs, you must first understand how time calculation works for SLA KPIs. The time calculation for SLA KPIs depends on the warning and failure time, and the customer service and holiday schedules associated with the SLA KPI item.

The following is an example of a SLA KPI that describes how time calculation works. The configurations set for the SLA KPI are as follows:

- Defined working hours: 9 AM to 5 PM (8 hours daily)
- Failure duration: 12 hours
- Holiday calendar: The next day is marked as a holiday.
- The case was created today at 10 AM.

So, after time calculation, the failure duration will be the day after the next day at 14:00 (2 PM). This is calculated by considering the remaining hours for the day; that is, 5 PM – 10 AM = 7 hours, which leaves 5 hours for the next day (calculated as failure duration – hours consumed today). The next day doesn't get calculated because it's a holiday. So, the failure duration will be the day after the next day: 9 AM + 5 hours = 14:00 (2 PM).

For more information about creating customer service schedules, go to: Create customer service schedule and define the work hours. For more information about creating holiday schedules, go to: Create and manage holiday schedules.

Apart from warning and failure time calculation, SLA time calculation also involves calculating *elapsed time*, which is the period when the SLA KPIs are paused and

resumed. To ignore the working hours spent while the SLA KPIs were in a paused state, elapsed time is used in calculating the final failure duration.

Scenarios and recommendations

Whenever any SLA KPI instance is created, the warning and failure times are created, depending on the factors described in the Understand time calculation of SLA KPIs section. A change in the calendar working hours won't affect the existing KPI instances.

However, you might have the following scenarios, which will affect the existing KPI instances:

- Pausing and resuming the SLA KPI instance.
- Updating the SLA on the target entity.
- A change in the SLA item.
- Reapplying the SLA KPI instance after the terminal state (in case of Recalculation on Terminal State).

In the above scenarios, the warning time and the failure time of the SLA KPIs are recalculated by using the new customer service schedule and the holiday schedule. However, if you want to change the existing customer service and holiday schedules that are already in use in the existing SLA KPI instances, you can implement the recommendations that are provided in the following section.

> ⓘ **Note**
>
> Before applying the changes to your production environment, you must validate all the scenarios and the recommendations to ensure that all the conditions are met.

Scenario 1:

Conditions:

- Only one SLA KPI is set as the default.
- One calendar needs to be associated.
- Multiple SLA items.
- With or without a pause and resume scenario.
- No need to update existing, running KPI instances.

Recommendation:

1. Don't modify the existing SLA and calendar. The existing SLA can continue to remain in an active state in the production environment. Create a similar SLA with

a new calendar and the same kind of SLA items.

2. Activate the new SLA and set it as the default. This will ensure that all the new cases are created with the new SLA, and time calculation will be done with the new calendar information. If you aren't using a default SLA, update your SLA condition to update the SLA ID in the Case entity accordingly. More information: Apply SLAs

Scenario 2

Conditions:

- Multiple SLAs
- Multiple calendars need to be associated.
- Multiple SLA items.
- With or without a pause and resume scenario.
- No need to update existing, running KPI instances.

Recommendation:

1. Don't modify the existing SLAs and calendars. The earlier SLAs can continue to remain in an active state in the production environment. Create similar SLAs with a new calendar and the same kind of SLA items.

2. Activate the new SLAs. This will ensure that all the new cases are created with the new SLA, and time calculation will be done with the new calendar information.

3. Update your SLA conditions to update the SLA ID in the Case entity accordingly. More information: Apply SLAs

Scenario 3

Conditions:

- Multiple SLAs.
- Multiple calendars.
- Multiple SLA items.
- Doesn't include a pause and resume scenario.
- Need to update existing, running KPI instances.

Recommendation:

Modify the existing calendars. This will ensure that all the new cases are created with same SLA, and time calculation is done with the new calendar information. However, the existing running KPI instances won't calculate the warning and failure time based on the

new calendar automatically. You'll need to initiate an event for the KPI instance to pick the new calendar.

For example, introduce the pause state and trigger a quick pause, and then resume the update on the case. This will make the KPI instance pick the new calendar information. To initiate a pause and resume, either agents can do a manual update on each case individually, or you can implement a custom logic to update the case during the lowest activity hours.

For example, a flow can run during the lowest activity hours with the following logic:

- Find the associated SLA from a calendar that needs to be updated.
- Find all the incidents which have the same SLA ID field value as the above SLA. You can do this in batches to avoid running into scalability issues.
- Do an update on the case to put it to a paused state.
- Do the next update on the case, which puts it back to Resume.

More information: Apply SLAs

Scenario 4

Conditions:

- Multiple SLAs
- Multiple calendars need to be associated.
- Multiple SLA items.
- Includes a pause and resume scenario.
- Need to update existing, running KPI instances.

Recommendation:

This is a complex scenario that can't be completely implemented. It might cause unexpected results for those KPI instances that were set to a paused or resumed state before the new calendar was applied, because the elapsed time for such instances might have already been calculated during the paused or resumed state by using the old calendars. So, the final calculation might be done partly with the old calendar and partly with the new calendar.

See also

Create a customer service schedule and define the work hours

Create and manage holiday schedules

SLA time calculation scenarios

Article • 10/13/2023

This article describes SLA time calculations, given that:

- Warning Time: 1 day (1*24= 24 hours)
- Failure Time: 2 days (2*24= 48 hours)

SLA without any calendar

When you apply an SLA to a case but don't attach a calendar to the SLA, the time is calculated from the creation of the case.

In this example, time is calculated as follows:

- Case created on 06/14/2023 3:00 PM.
- Warning and failure times are set as 1 and 2 days, respectively.
- So, the warning time is 06/15/2023 3:00 PM and the failure time is 06/16/2023 3:00 PM.

SLA with calendar

When you create an SLA with a calendar with working hours and working days of the week set, then the time calculation doesn't consider the non-working hours and days.

In this example, time is calculated as follows:

- Case created on 06/14/2023 3:00 PM.
- Warning and failure times are set as 1 and 2 days, respectively.
- Working hours are set as 8:00 AM to 5:00 PM.
- Working hours are calculated as 9 hours.
- Working days are set as Monday to Friday.
- Skips Saturday and Sunday.
- Warning time is 06/19/2023 12:00 noon and failure time is 06/22/2023 9:00 AM.

Warning Time: 1 day (1*24= 24 hours)

Here's how the warning time is calculated:

- Case was created on 06/14/2023 at 3:00 PM.
- 06/14/2023- 3:00 PM to 5:00 PM (2 hours) = 24-2 = 22 hours

- 06/15/2023- 8:00 AM to 5:00 PM (9 hours) = 22-9 = 13 hours
- 06/16/2023- 8:00 AM to 5:00 PM (9 hours) = 13-9 = 4 hours
- 06/17/2023- weekend (non-working day)
- 06/18/2023- weekend (non-working day)
- 06/19/2023- 8:00 AM to 12:00 noon (4 hours) = 4-4= 0 hours

Failure Time: 2 days (2*24= 48 hours)

Here's how the failure time is calculated:

- Case was created on 06/14/2023 at 3:00 PM.
- 06/14/2023- 3:00 PM to 5:00 PM (2 hours) = 48-2= 46 hours
- 06/15/2023- 8:00 AM to 5:00 PM (9 hours) = 46-9= 37 hours
- 06/16/2023- 8:00 AM to 5:00 PM (9 hours) = 37-9= 28 hours
- 06/17/2023- weekend (non-working day)
- 06/18/2023- weekend (non-working day)
- 06/19/2023- 8:00 AM to 5:00 PM (9 hours) = 28-9= 19 hours
- 06/20/2023- 8:00 AM to 5:00 PM (9 hours) = 19-9= 10 hours
- 06/21/2023- 8:00 AM to 5:00 PM (9 hours) = 10-9= 1 hour
- 06/22/2023- 8:00 AM to 9:00 AM (1 hour) = 1-1= 0 hour

So, if you create a case on 06/14/2023 3:00 PM with warning and failure times set as 1 and 2 days respectively, then the warning time is 06/19/2023 12:00 noon, and the failure time is 06/22/2023 9:00 AM.

SLA with calendar and break hours

When you create an SLA with a calendar and on that calendar you set working hours, break hours, and working days of the week, then the time calculation doesn't consider the non-working and break hours.

Time is calculated as follows:

- Case created on 06/14/2023 3:00 PM.
- Warning and failure times are set as 1 and 2 days, respectively.
- Working hours are set as 8:00 AM to 5:00 PM.
- Break is 1 hour between 1:00 PM to 2:00 PM.
- Working hours are calculated as 8 hours.
- Working days are set as Monday to Friday.
- Skips Saturday and Sunday.
- Warning time is 06/19/2023 3:00 PM and failure time is 06/22/2023 3:00 PM.

Warning Time: 1 day (1*24= 24 hours)

Here's how the warning time is calculated:

- Case got created on 06/14/2023 at 3:00 PM
- 06/14/2023- 3:00 PM to 5:00 PM (2 hours) = 24-2= 22 hours
- 06/15/2023- 8:00 AM to 1:00 PM (5 hours) = 22-5= 17 hours
- 06/15/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/15/2023- 2:00 AM to 5:00 PM (3 hours) = 17-3=14 hours
- 06/16/2023- 8:00 AM to 1:00 PM (5 hours) = 14-5= 9 hours
- 06/16/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/16/2023- 2:00 AM to 5:00 PM (3 hours) = 9-3= 6 hours
- 06/17/2023- weekend (non-working day)
- 06/18/2023- weekend (non-working day)
- 06/19/2023- 8:00 AM to 1:00PM (5 hours) = 6-5= 1 hour
- 06/19/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/19/2023- 2:00 AM to 3:00 PM (1 hour) = 1-1= 0

Failure Time: 2 days (2*24= 48 hours)

Here's how the failure time is calculated:

- Case got created on 06/14/2023 at 3:00 PM
- 06/14/2023- 3:00 PM to 5:00 PM (2 hours) = 48-2= 46 hours
- 06/15/2023- 8:00 AM to 1:00 PM (5 hours) = 46-5= 41 hours
- 06/15/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/15/2023- 2:00 AM to 5:00 PM (3 hours) = 41-3=38 hours
- 06/16/2023- 8:00 AM to 1:00 PM (5 hours) = 38-5= 33 hours
- 06/16/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/16/2023- 2:00 AM to 5:00 PM (3 hours) = 33-3= 30 hours
- 06/17/2023- weekend (non-working day)
- 06/18/2023- weekend (non-working day)
- 06/19/2023- 8:00 AM to 1:00 PM (5 hours) = 30-5= 25 hours
- 06/19/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/19/2023- 2:00 AM to 5:00 PM (3 hours) = 25-3= 22 hours
- 06/20/2023- 8:00 AM to 1:00 PM (5 hours) = 22-5= 17 hours
- 06/20/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/20/2023- 2:00 AM to 5:00 PM (3 hours) = 17-3= 14 hours
- 06/21/2023- 8:00 AM to 1:00 PM (5 hours) = 14-5= 9 hours
- 06/21/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/21/2023- 2:00 AM to 5:00 PM (3 hours) = 9-3= 6 hours

- 06/22/2023- 8:00 AM to 1:00 PM (5 hours) = 6-5= 1 hour
- 06/22/2023- 1:00 AM to 2:00 PM (1 hour) = break hours
- 06/22/2023- 2:00 AM to 3:00 PM (1 hour) = 1-1= 0 hours

So, if you create a case on 06/14/2023 3:00 PM with warning and failure times set as 1 and 2 days respectively, then the warning time is 06/19/2023 3:00 PM, and the failure time is 06/22/2023 3:00 PM.

SLA with calendar and holiday calendar

When you create an SLA with a calendar and set working hours, working days of the week, and some days as holidays, then the non-working hours, working days of the week, and holidays aren't considered.

TIme is calculated as:

- Case created on 06/14/2023 3:00 PM.
- Warning and failure times are set as 1 and 2 days, respectively.
- Working hours are set as 8:00 AM to 5:00 PM.
- Working hours are calculated as 9 hours daily.
- Working days are set as Monday to Friday.
- Skips Saturday and Sunday.
- Skips holidays as per holiday calendar.
- Warning time will be 06/21/2023 12:00 noon and failure time will be 06/26/2023 9:00 AM.

Warning Time: 1 day (1*24= 24 hours)

Here's how the warning time is calculated:

- Case was created on 06/14/2023 at 3:00 PM
- 06/14/2023- 3:00 PM to 5:00 PM (2 hours) = 24-2= 22 hours
- 06/15/2023- 8:00 AM to 5:00 PM (9 hours) = 22-9= 13 hours
- 06/16/2023- holiday (non-working day)
- 06/17/2023- weekend (non-working day)
- 06/18/2023- weekend (non-working day)
- 06/19/2023- holiday (non-working day)
- 06/20/2023- 8:00 AM to 5:00 PM (9 hours) = 13-9= 4 hours
- 06/21/2023- 8:00 AM to 12:00 noon (4 hours) = 4-4= 0 hours

Failure Time: 2 days (2*24= 48 hours)

Here's how the failure time gets calculated:

- Case got created on 06/14/2023 at 3:00 PM
- 06/14/2023- 3:00 PM to 5:00 PM (2 hours) = 48-2= 46 hours
- 06/15/2023- 8:00 AM to 5:00 PM (9 hours) = 46-9= 37 hours
- 06/16/2023- holiday (non-working day)
- 06/17/2023- weekend (non-working day)
- 06/18/2023- weekend (non-working day)
- 06/19/2023- holiday (non-working day)
- 06/20/2023- 8:00 AM to 5:00 PM (9 hours) = 37-9= 28 hours
- 06/21/2023- 8:00 AM to 5:00 PM (9 hours) = 28-9= 19 hours
- 06/22/2023- 8:00 AM to 5:00 PM (9 hours) = 19-9= 10 hours
- 06/23/2023- 8:00 AM to 5:00 PM (9 hours) = 10-9= 1 hour
- 06/24/2023- weekend (non-working day)
- 06/25/2023- weekend (non-working day)
- 06/26/2023- 8:00 AM to 9:00 AM (1 hour) = 1-1= 0 hour

So, if you create a case on 06/14/2023 3:00 PM and warning and failure times are set as 1 and 2 days respectively, then the warning time is 06/21/2023 12:00 noon and the failure time is 06/26/2023 9:00 AM.

Pause and hold scenario

When you create an SLA and then pause it for hours or days, the paused hours or days aren't considered in the SLA failure and warning times.

Time is calculated as follows:

- Case created on 06/14/2023 3:00 PM.
- warning and failure times are set as 1 and 2 days, respectively.
- Working hours are set as 8:00 AM to 5:00 PM.
- It will calculate 9 hours daily as working hours.
- Working days are set as Monday to Friday.
- Skips Saturday and Sunday.
- Skips holidays as per the Holiday calendar.
- Skips paused hours or days.
- Warning time is 06/21/2023 10:00 AM and failure time is 06/26/2023 4:00 PM.

Warning Time- 1 day (1*24= 24 hours)

Here's how the warning time iss calculated:

- Case got created on 06/13/2023 at 1:00 PM.
- 06/13/2023- 1:00 PM to 5:00 PM (4 hours) = 24-4= 20 hours
- 06/14/2023- 8:00 AM to 5:00 PM (9 hours)- Paused
- 06/15/2023- 8:00 AM to 5:00 PM (9 hours) = 20-9= 11 hours
- 06/16/2023- holiday (non-working day)
- 06/17/2023- weekend (non-working day)
- 06/18/2023- weekend (non-working day)
- 06/19/2023- holiday (non-working day)
- 06/20/2023- 8:00 AM to 5:00 PM (9 hours) = 11-9= 2 hours
- 06/21/2023- 8:00 AM to 10:00 AM (2 hours) = 2-2= 0 hour

Failure Time- 2 days (2*24= 48 hours)

Here's how the failure time is calculated:

- Case was created on 06/13/2023 at 1:00 PM
- 06/13/2023- 1:00 PM to 5:00 PM (4 hours) = 48-4= 44 hours
- 06/14/2023- 8:00 AM to 5:00 PM (9 hours) - Paused
- 06/15/2023- 8:00 AM to 5:00 PM (9 hours) = 44-9= 35 hours
- 06/16/2023- holiday (non-working day)
- 06/17/2023- weekend (non-working day)
- 06/18/2023- weekend (non-working day)
- 06/19/2023- holiday (non-working day)
- 06/20/2023- 8:00 AM to 5:00 PM (9 hours) = 35-9= 26 hours
- 06/21/2023- 8:00 AM to 5:00 PM (9 hours) = 26-9= 17 hours
- 06/22/2023- 8:00 AM to 5:00 PM (9 hours) = 17-9= 8 hours
- 06/23/2023- 8:00 AM to 5:00 PM (9 hours) = Paused
- 06/24/2023- weekend (non-working day)
- 06/25/2023- weekend (non-working day)
- 06/26/2023- 8:00 AM to 4:00 PM (8 hours) = 8-8= 0 hour

So, if you create a case is on 06/14/2023 3:00 PM with warning and failure times set as 1 and 2 days respectively, then the warning time is 06/21/2023 10:00 AM and the failure time is 06/26/2023 4:00 PM.

See Also

Manage changes to customer service and holiday schedules of existing SLA KPIs
Create and manage holiday schedules

Configure service-level agreements

Article • 10/14/2023

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

With service-level agreements (SLAs) configured in Customer Service Hub, you can:

- Use out-of-the-box actions in Microsoft Power Automate.
- Define work hours, and pause and resume SLAs at the SLA KPI level and SLA item level, which help track SLA items for different work hours based on priority and criteria. The pause settings at SLA KPI level or SLA item level give you added flexibility to define pause conditions at a more granular level.
- In a case lifecycle, multiple SLA KPIs can be triggered at different start points. The following illustration depicts how you can define an overall resolution time, and also specify SLA KPIs at different start points.

To configure SLAs in Customer Service Hub:

1. Review prerequisites.
2. Create SLA KPIs.
3. Create SLAs.
4. Apply SLAs

> **Note**

You can create SLAs only in environments that have customer engagement apps such as Customer Service, as SLAs are available by default in these apps.

Prerequisites

Review the following requirements before configuring SLAs for your organization:

- The System Administrator, System Customizer, or Customer Service Manager role is assigned to you. Additionally, make sure that the following permissions have been granted in **Security** > **Security Roles** > **Custom Entities**:
  - **CSR Manager**
    - **Connector**: All permissions at the business unit level.
    - **SLAKPI**: Create permission at the business unit level, delete permission at the parent-child level, and other permissions at the organization level.
    - **ProcessStageParameter**: All permissions at the business unit level.
  - **Customer Service Representative**: Read permission at the organization level for the SLA KPI entity.

- Power Automate License is available for the user creating actions on SLA KPI instance statuses.

- Identify target entities and add customizations. To add customizations in target entities to track SLAs, follow these steps:

  1. Create a lookup field on the entity for which an SLA has to be configured, and relate it to an SLA KPI instance. Lookup fields are created so that you can view the SLA in the timer on the entity form and track your SLAs. To learn more, see Create and edit fields. For example, to track an SLA on a case for "escalated by KPI", you need to create a field as **EscalatedByKPI** on the Case entity, and provide the **Data Type** as **Lookup** and **Target Record Type** as **SLA KPI Instance**.

  2. Use the lookup field to configure a timer to help users estimate the amount of time they have to complete a task—typically as specified in an SLA.
     To configure a timer, add the timer control to an entity form. The timer control initially displays a countdown timer to show the time remaining to complete the task. To learn more, see Add a timer control to the Case form to track time against an SLA.

Note

- In Unified Interface, the **Elapsed Time** and **Paused On** attributes of an SLA KPI Instance contain values equivalent to the **Onhold Time** and **Last Onhold Time** attributes respectively, of the target record, such as, case and account in the web client.
- Once the SLA KPI Instance reaches the terminal state (**Succeeded** or **Noncompliant**), the **Paused on** and **Elapsed Time** are no longer be calculated.

Create SLA KPIs

SLA KPIs are performance indicators, such as First Response or Resolve by, that you'd like to track.

You can create SLA KPIs from the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Terms** in **Operations**. The **Service Terms** page appears.
   b. In the **SLA KPIs** section, select **Manage**.

   The **Active SLAKPIs** view is displayed. Select the SLA for which you want to add an SLA item.

2. Select **New**. The **New SLA KPI** page appears.

3. Enter the following details on the **General** tab:

   - **Name**: The name of the SLA KPI.
   - **Owner**: The user creating the SLA is populated by default. You can specify a different owner.
   - **Entity Name**: Select the entity for which the KPI must be measured.
   - **KPI Field**: Select the respective KPI field. For example, if you're creating an SLA KPI to define the time within which a first response should be sent to the customer, select **FirstResponseByKPI** in the list.

- **Applicable From**: Select a value based on which the warning and failure time are measured. For example, if you select **Created On**, the warning and failure start time for an SLA are calculated from the date and time when the entity was created.

4. Select **Save**.

5. To define the pause criteria at the KPI level, in the **Pause Conditions** section that appears, do the following:
   a. Set the toggle to **Yes** for **Override Criteria**. If any pause settings are applied at the entity level for your org, they're overridden by the criteria define at the KPI level. For the other KPIs, the entity level pause settings continues to function if no pause criteria is defined at the KPI level.
   b. Select **Add** to define the conditions in which the SLA KPI can be paused.

   > **Note**
   >
   > At runtime, when you pause an SLA KPI instance and resume it, the SLA KPI instance is canceled and a new SLA KPI instance is created.

6. Select **Activate**. The SLA KPI is saved and activated.

When agents create an SLA KPI instance for an entity other than the case entity, the **Regarding** column appears as blank on Unified Interface, and as **(No name)** on the web client. This is a by-design behavior, and is also applicable to custom entities.

If you choose to show the entity name for your agents, perform the steps provided.

Configure SLA KPI instance entity name through Advanced Find

Perform the following steps to add a new column called **Name (Regarding)** that displays the name of the target entity of the SLA KPI Instance.

1. Go to Power Apps, and then go to **Settings** > **Advanced Find**.
2. In the **Look For** list, select **SLA KPI Instances**.
3. Select the **Field** as **Regarding ID**, and then select **Contains Data**.
4. Go to **Edit Columns** > **Add columns**, and then select **Record Type** as **Regarding (Entity)**.
5. Select **Name**, and then select **OK**.
6. Select **Results**. You'll see the **Name (regarding)** column displaying the name of the entity.

You can also use the following query to add a new column called **Name (Regarding)**.

1. From **Advanced Find**, select **Download Fetch XML**.
2. Paste the following query on the URL to see the full name of the target entity for the SLA KPI instance record. For more information on the format of the API call, see: Request. Here's an example: https:// your org link/api/data/v9.2/slakpiinstances?fetchXml=enter the following query. [URL encode the fetchxml]

```
<fetch version="1.0" output-format="xml-platform" mapping="logical"
distinct="false">

  <entity name="slakpiinstance">
    <attribute name="name" />
    <attribute name="status" />
    <attribute name="regarding" />
    <attribute name="failuretime" />
    <attribute name="warningtime" />
    <attribute name="succeededon" />
    <attribute name="slakpiinstanceid" />
    <order attribute="name" descending="false" />
    <link-entity name="lead" from="leadid" to="regarding" link-type="inner"
alias="ai">
      <attribute name="fullname" />
    </link-entity>
  </entity>
</fetch>
```

Create SLAs

Create SLAs to define conditions and actions that are applicable when an SLA is applied to an entity. The following steps are involved in creating the SLA:

1. Create an SLA.
2. Create an SLA item.
3. Configure actions for the SLA item.
4. Activate the SLA.

> ⓘ **Note**
>
> SLAs that are created in either the web client or Unified Interface can be viewed in both the web client and Unified Interface, but can be edited only where they were created.

Create an SLA

You can create an SLA from the Customer Service admin center or Customer Service Hub apps.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Terms** in **Operations**. The **Service Terms** page appears.
   b. In the **Service Level Agreements (SLAs)** section, select **Manage**.

   The **All Service Level Agreements** view is displayed. You can switch between various system views using the drop-down list.

2. Select **New**. The **New SLA** page appears.

3. Enter the following details on the **General** tab::

   - **Name**: Enter a name for the SLA.
   - **Primary Entity**: Select a value in the box.
   - **Description**: Enter a description for the SLA.

4. Select **Save**. The **SLA Items** section appears on the page, and the SLA is saved. You can perform the steps to create SLA items as described in the following section.

Create an SLA item

You can create an SLA item from the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Terms** in **Operations**. The **Service Terms** page appears

   b. In the **Service Level Agreements (SLAs)** section, select **Manage**.

The **All Service Level Agreements** view is displayed. Select the SLA for which you want to add an SLA item.

2. On the page that appears, select **New SLA Item**. The **New SLA Item** dialog box appears.

3. Enter the following details on the **General** tab::

   - **Name**: Enter a name.
   - **KPI**: Select an SLA KPI.
   - **Allow Pause and Resume**: (Optional.) Enable this option if you want the SLA to be paused during the time the record is on hold. For each entity that's enabled for the SLA, you can set each status that are considered "on hold" in the **Service Management** > **Service Configuration Settings** page.
   - **Business Hours**: (Optional.) Select a value to assign business hours. The SLA is calculated based on the business hours and business closure that you define. More information: Create customer service schedule and define the work hours.

4. In the **Applicable When** section, define the conditions for when the SLA can be applied for the entity.

   The SLA is triggered when the applicable when condition is met throughout. If the applicable when condition isn't met after an SLA is triggered, the SLA KPI instance gets canceled. We recommend that you don't use case fields that are updated frequently because any change to the field value might lead to cancelation of the SLA item.

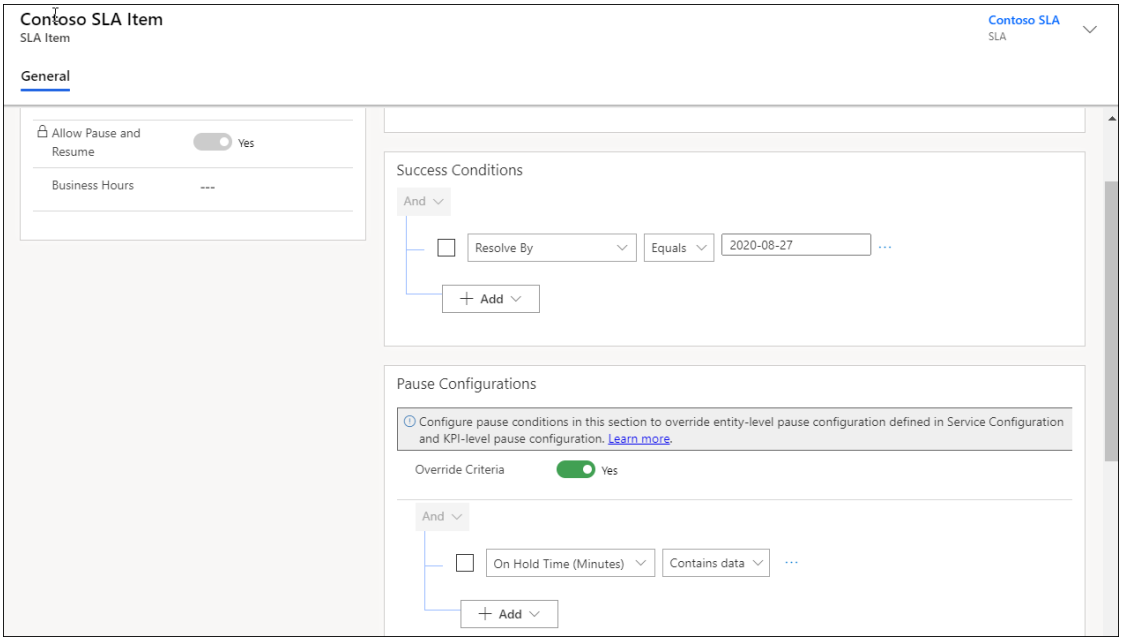
5. In the **Success Conditions** section, define the conditions that specify the success criteria of the SLA.

> **ⓘ Important**
>
> If you specify the success condition on the same entity on which applicable when is defined, a recommendation message are displayed with the suggestion that you don't use the same entity. You can choose to select **OK** if your organization needs the conditions to be configured on the same entity.

6. In the **Pause Configurations** section that appears only when **Allow Pause and Resume** is enabled, do the following:
   a. Set the toggle to **Yes** for **Override Criteria** to pause the SLA item. This setting overrides the pause settings defined at the entity level, if any, in Service

Configuration or at the SLA KPI level.

b. Select **Add** to define the conditions for pausing the SLA item.



7. In the **Warn and Fail Duration** section, specify the values to trigger notifications when an SLA is missed. If you don't need **Warning Duration**, you can set it to null so that SLAs don't reach the **Nearing noncompliance** status.

> **Note**
>
> The failure and warning time is calculated after considering the business hours selected in the SLA record. If you don't set the business hours record (customer service schedule), the work hours are considered to be all day, every day.

8. Select **Save**.

Configure actions for the SLA item

1. On the SLA page, select the SLA item, and then select **Edit SLA Item**. The SLA item page appears.

2. In the **Actions** area, select **Configure Actions**. The Power Automate application opens on a new tab where you can configure the actions and reminders for agents to keep track of their SLAs.

3. Perform the following steps in Power Automate:

   a. Accept the default settings or select the ellipsis to configure a connection.

   b. Select **Continue**. The predefined flow that's specific to the SLA appears.

> ⓘ **Note**
>
> We recommend that you don't edit the predefined flow, which can cause breaks in the flow, and the SLA might not work as defined.

c. Select **Switch**. The following condition steps are displayed for each of which you can configure a required action:

- **Is Nearing Non-Compliance**: Runs when the warning time is reached for the SLA.
- **Is Succeeded**: Runs when the SLA succeeds.
- **Is Non-compliant**: Runs when the SLA fails.

d. Select **[Do not delete or update] Is Nearing Non-Compliance** > **Add an action**. The **Choose an action** area appears, in which you can configure the action that must be performed when the warning time has been reached for the SLA.

e. In **Choose an operation**, search for an action, such as **Perform an unbound action**, and select it.

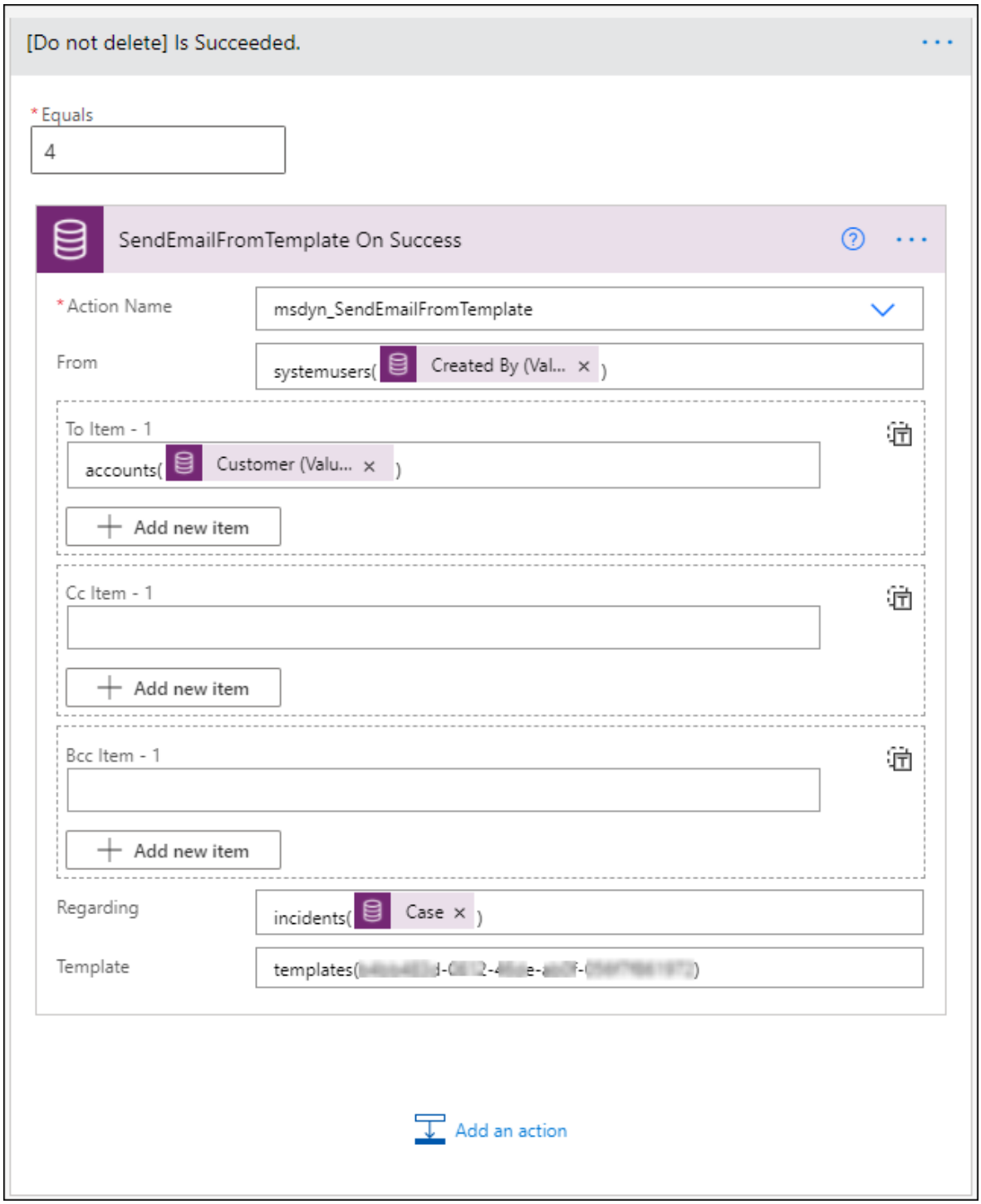
f. In **Action Name**, select **msdyn_SendEmailFromTemplate**, and configure the following options that are displayed for the action:

- **From**
- **To Item**
- **Cc Item**
- **Regarding**
- **Template**

> ⓘ **Note**
>
> To obtain the value for the **Template** field, see Open Data Protocol.

g. Repeat the steps to configure the actions for **Is Succeeded** and **Is Non-compliant**.

A sample screenshot of the configured action is as follows.



h. Save and exit Power Automate.

> **Note**
>
> More information: **Configure connectors in Power Automate**

4. Select **Save & Close** on the SLA item dialog box.

5. Define as many SLA items as you need.

6. Select **Activate**. The SLA is activated.

Apply SLAs

To understand how you can apply SLAs, see Apply service-level agreements

See also

Enable entities for service-level agreements
Troubleshoot issues in SLAs
Add a timer control for SLA-enabled entities

Apply SLAs

Article • 07/18/2023

You can apply service-level agreements (SLAs) to a case or an SLA-enabled entity record in one of the following ways:

- By updating the SLA information automatically through a workflow, Power Automate flow, or custom plug-in written for the entity.
- Through the entitlement associated with the case entity record. (This isn't applicable for other SLA-enabled entities.)
- Manually applying SLAs to records.
- By setting a particular SLA as the default SLA.

The SLA is reapplied whenever there's an update on an entity record and the updated fields are part of the **Applicable When** conditions of the SLA items.

When the SLA is reapplied, all the items of that SLA are evaluated based on the updated record fields. The failure or warning actions of the matching SLA Item are initiated if the time has exceeded. This happens even if the failure or warning actions were already initiated before the record was updated.

In Unified Interface, by default, when the SLA moves to a terminal status (non-compliant or succeeded), the **Applicable When** and **Success Criteria** won't be evaluated again on the SLA. If you want the SLA to be reevaluated, you can enable the reevaluation setting in the service configuration settings. More information: Enable SLA recalculation

When an Unified Interface SLA is reevaluated, a new SLAKPIInstance gets created and the previous instance gets cancelled. This isn't applicable to legacy SLAs.

During maintenance activities or when you're importing records and you don't want the SLAs to be applied, you can disable SLAs for your organization. A system administrator can disable SLAs from the **System Settings** dialog box. More information: System Settings dialog box - Service tab

> **Note**
>
> Only one SLA can be applied to a record. When an entity record is updated by using a different SLA, the previously applied SLA is canceled.

Apply SLAs automatically

You can automatically apply SLAs to records based on your business logic by using workflows, Power Automate flows, or custom plug-ins. For example, if your customers are spread across different countries or regions, you can have multiple SLAs with different business hours and holiday schedules. You can set up business logic to apply SLAs on case records based on the customer's country or region, to make sure that the SLA time calculation is done correctly.

To create workflows so that SLAs will be automatically applied, talk to your customer service managers, administrator, or customizer. More information: Overview of using workflow processes

You can also use the Power Automate flow portal to update the SLA. Currently the flow expects a GUID of the SLA record. More information: Create your first flow

If you choose to write a custom plug-in for the SLA-enabled entity, you can update the SLA ID in the pre-update plugin of the entity. For example, for case, the code in plug-in would look like:

`incident["slaid"] = new EntityReference("sla", new Guid("baa25488-6d99-es11-99da-225056836fb7"))` .

Apply SLAs through entitlements

You can create entitlements to define support terms. More information: Associate entitlements to cases

Apply SLAs manually

To apply SLAs to records manually, select the SLA in the SLA field. This field isn't available by default on entity forms, so you will need to ask your system administrator to add it.

While applying the SLA, the application first looks for automatically applied SLAs, followed by SLAs applied through entitlement. If there aren't any, the application looks for the SLA that's set as the default.

Set a default SLA

You can apply a default SLA in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to **Service Level Agreements**.

Customer Service admin center

a. In the site map, select **Service terms** in **Operations**. The **Service terms** page appears.
b. In the **Service-level agreements (SLAs)** section, select **Manage**.

2. Select the required SLA and then select the **Set As Default** option from the ribbon.

Set an SLA as the default for a Case entity

For a Case entity, set an SLA as the default if you want it to apply to all cases that don't have an SLA applied through an entitlement. This is useful when a customer wants an SLA but doesn't have an entitlement. For all other entities that are enabled for SLA, you can set one default SLA.

To set an SLA as the default, see Set a default SLA.

> **Note**
>
> If you deactivate a default SLA, you must activate it again before resetting it as the default.

Apply and track SLA status and details on the case record

The service representative who is working on a case can see the SLA details right on the case form. The following table explains what happens when a standard or enhanced SLA is applied to a case form.

Case form with a standard SLA applied	Case form with an enhanced SLA applied
Only the failure time is tracked and saved on the case record. You can ask your system administrator or customizer to add a timer to the case form. The timer shows the time remaining to meet the SLA or the time elapsed since the SLA failed. More information: Add a timer control to the case form to track time against an SLA	When an enhanced SLA is applied to a case, a related SLA KPI Instance record is created for each SLA KPI that is tracked for that case. In the **Enhanced SLA Details** section of the case record, you'll see a timer and the SLA KPI Instances for the case with their status, failure times, and warning times. When a service rep puts a case on hold, the status of the SLA KPI Instance is set to Paused. You can see the time during which a case was on hold and the last time the case was put on hold. These details aren't available on the case

Case form with a standard SLA applied	Case form with an enhanced SLA applied
	form by default, but your system customizer can add these fields for you. The on-hold time is the time during which the case was set to a status that you defined as an On-Hold status in the **System Settings** dialog box. More information: System Settings dialog box - Service tab When the service representative resumes a case, the status of the SLA KPI Instance record is updated. The following details are updated in the record if the SLA isn't violated: - Failure time - Warning time - Total time the case has been on hold If the service representative puts the case on hold after the warning time, the warning time isn't updated when the case is resumed.

> **Note**
>
> - To track SLAs for entities other than Case, ask your system administrator or customizer to add an enhanced SLA timer on the entity forms. More information: **Add a timer to forms to track time against enhanced SLAs**
> - If you delete a custom field from an entity associated to an SLA, then you must also delete the custom field from the related entities of the SLA, such as SLA items and action flows.

See also

Enable entities for service-level agreements
Troubleshoot issues in SLAs

Add a timer control for SLA-enabled entities

Article • 08/29/2023

Add a timer control to a service-level agreement (SLA) enabled entity form to help users gauge the amount of time they have to complete a task as specified in the SLA. The timer control displays countdown timers that show the current status and time remaining for the configured SLA KPIs.

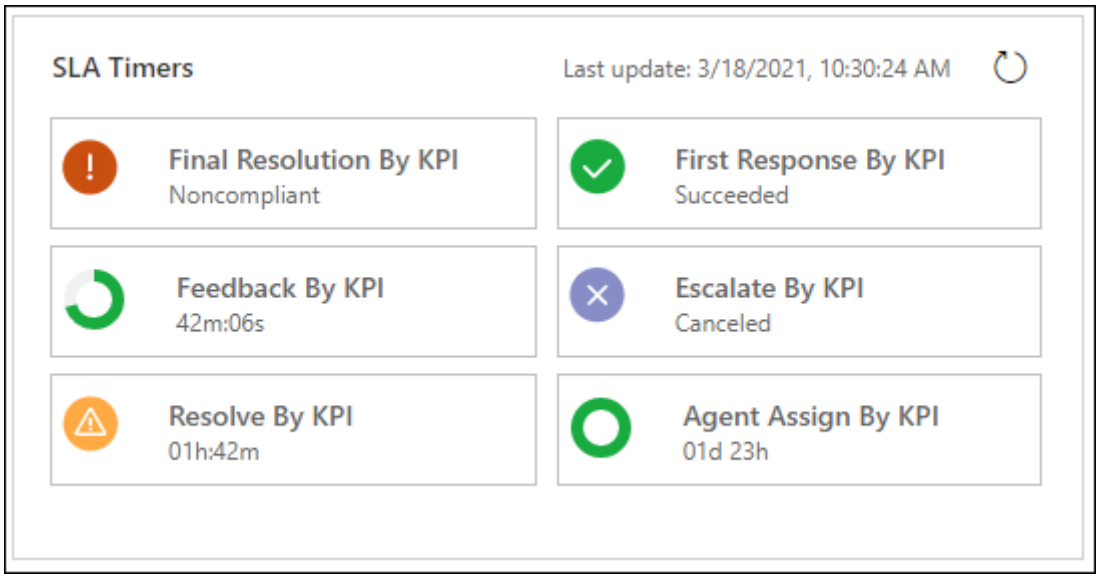
Add a SLA timer to a SLA-enabled entity

After you've configured the SLA KPIs, SLAs, and SLA items for an entity, you can add the SLA Timer control to display the SLA KPIs that are configured for the entity. You can customize the views to filter the KPIs and display only the relevant KPIs to agents. Some of the KPIs that agents can see include the different stages that KPIs go through.

For information on how the SLA KPIs are displayed at runtime when agents view the case to work on in Customer Service Hub, go to Timer for SLA-enabled entities.

> **Note**
>
> - The SLA Timer control displays SLA KPIs that are created in Unified Interface only.
> - The SLA Timer control displays **No Applicable SLA** when there aren't any applicable SLAs.

A sample runtime view of the SLA Timer is as follows.



However, SLA KPI Instances won't reach a **Nearing non-compliance** or **Non-complaint** state, if the **SLAWarningAndExpiryMonitoringFlow** isn't enabled and the SLA KPI Instance timer continues to run. The following warning message is displayed on the SLA Timers: "The SLA instances may be incorrect because workflow *<workflow ID>* is turned off. Please contact your admin to turn the workflow on." The workflow ID will vary from system to system as it corresponds to **SLAWarningAndExpiryMonitoringFlow**. For more information on how to enable **SLAWarningAndExpiryMonitoringFlow**, see Warning message appears on slakpiinstances.

For more information on why an SLA KPI Instance doesn't reach **Nearing Non-compliance** or **Non-compliant** state and how you can resolve it, see SLA KPI Instance doesn't reach Nearing Non-compliance or Non-compliant state, and the SLA KPI Instance timer continues to run.

Do the following steps to add the SLA timer control for the case entity.

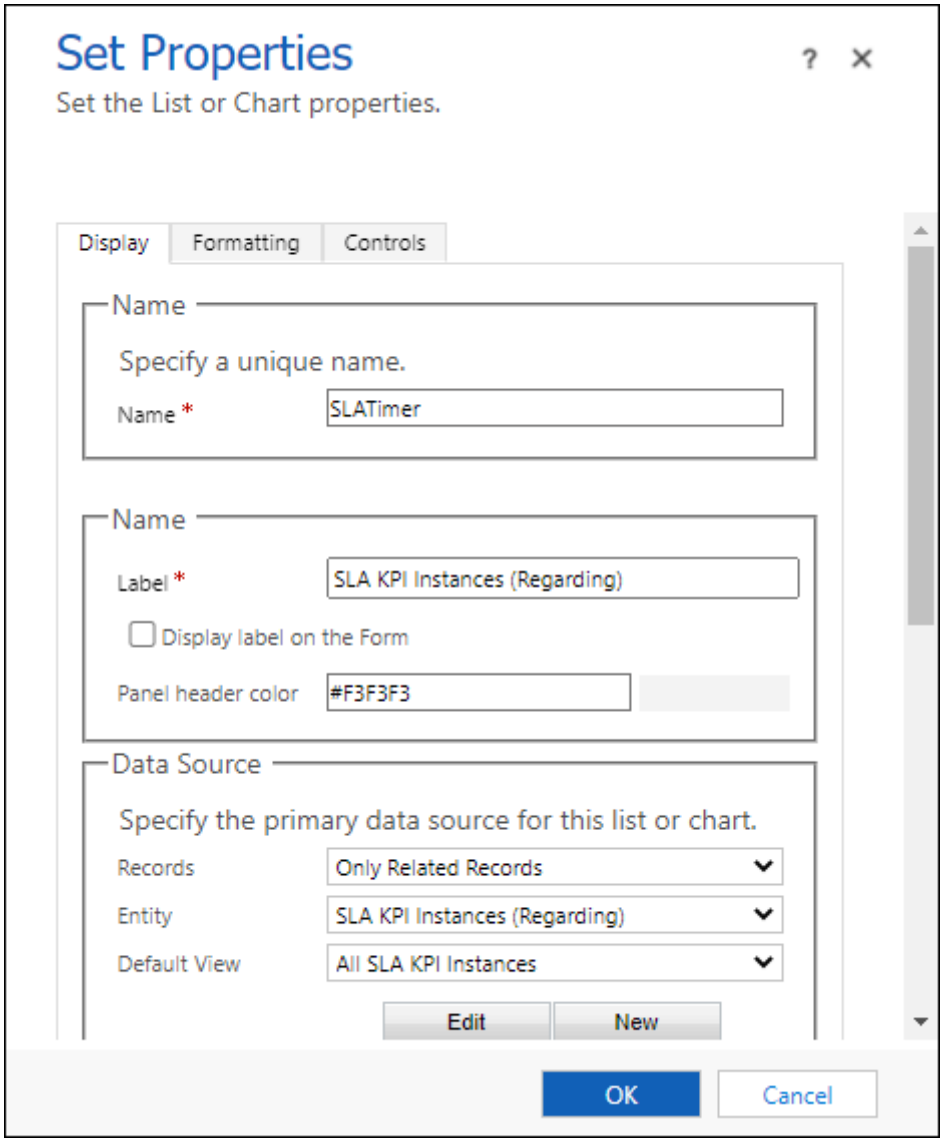
> **ⓘ Important**
>
> You can add the SLA timer control only in the classic Power Apps experience.

1. In your Power Platform environment, select **Advanced Settings** to go to **Customizations**.
2. Select **Customize the System**, and in the **Solutions** page, expand **Entities** under **Components**.
3. Select the entity for which you want to add the SLA Timer control, and in the **Forms** view, select the corresponding form. In this example, let us select the Case entity, and the **Case for interactive experience** form.

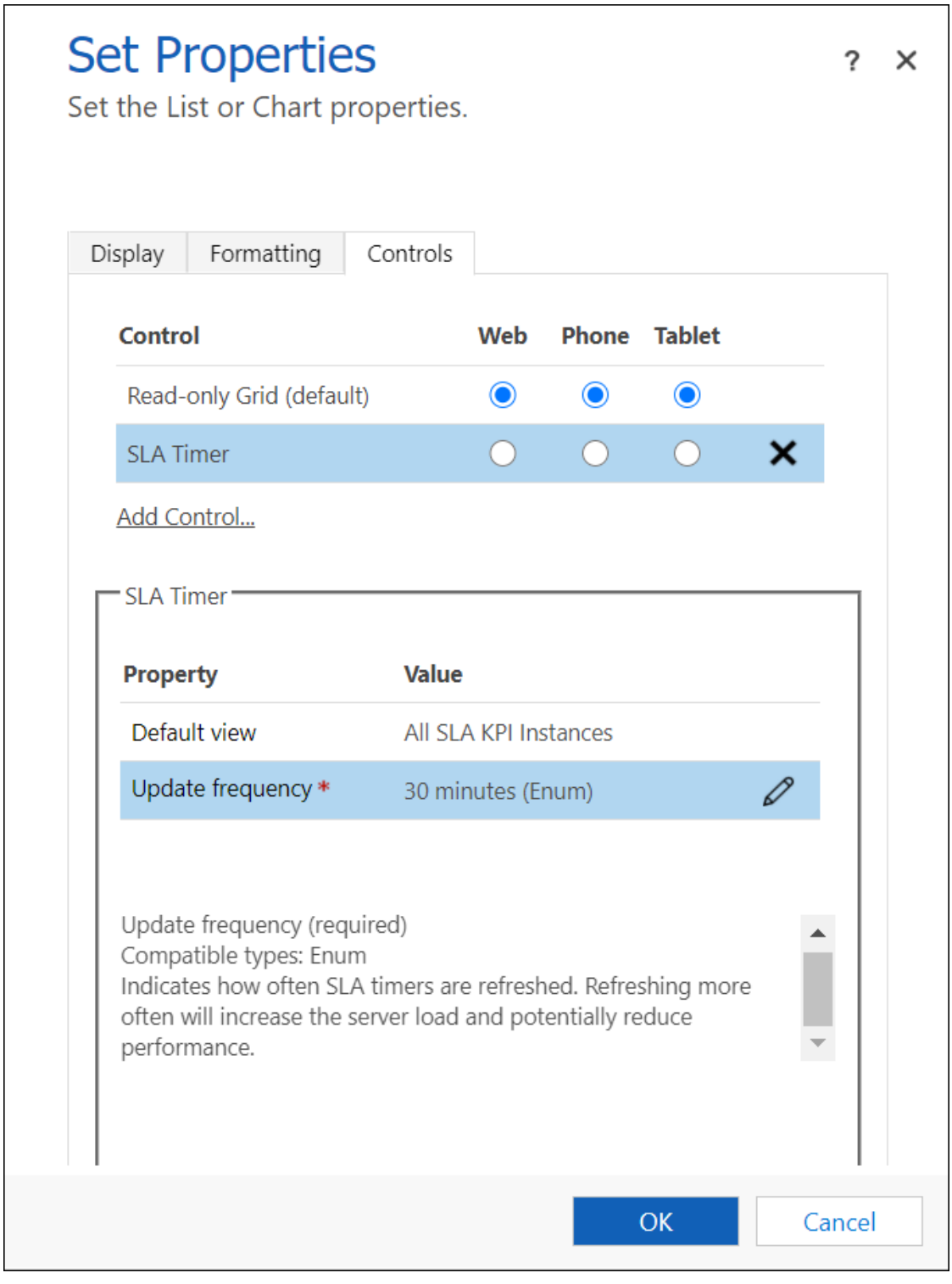
4. On the page that appears, on the **Insert** tab, insert a section, and then insert a subgrid.

5. Double-click the subgrid, and in the **Set Properties** dialog, enter the necessary details.

    - In the **Data Source** area, in **Default View**, you can add a view or edit an existing view to determine the SLA KPIs that should be displayed for agents at runtime. For information on views, go to Create and edit views.



6. On the **Controls** tab, enter the following information:
    a. Select **Add Control**, and choose SLA Timer.
    b. In the **SLA Timer** area, enter a value for **Update_Frequency_key** to set the timer refresh interval. For optimal performance, choose an interval that is not too short. The default interval is 30 minutes.

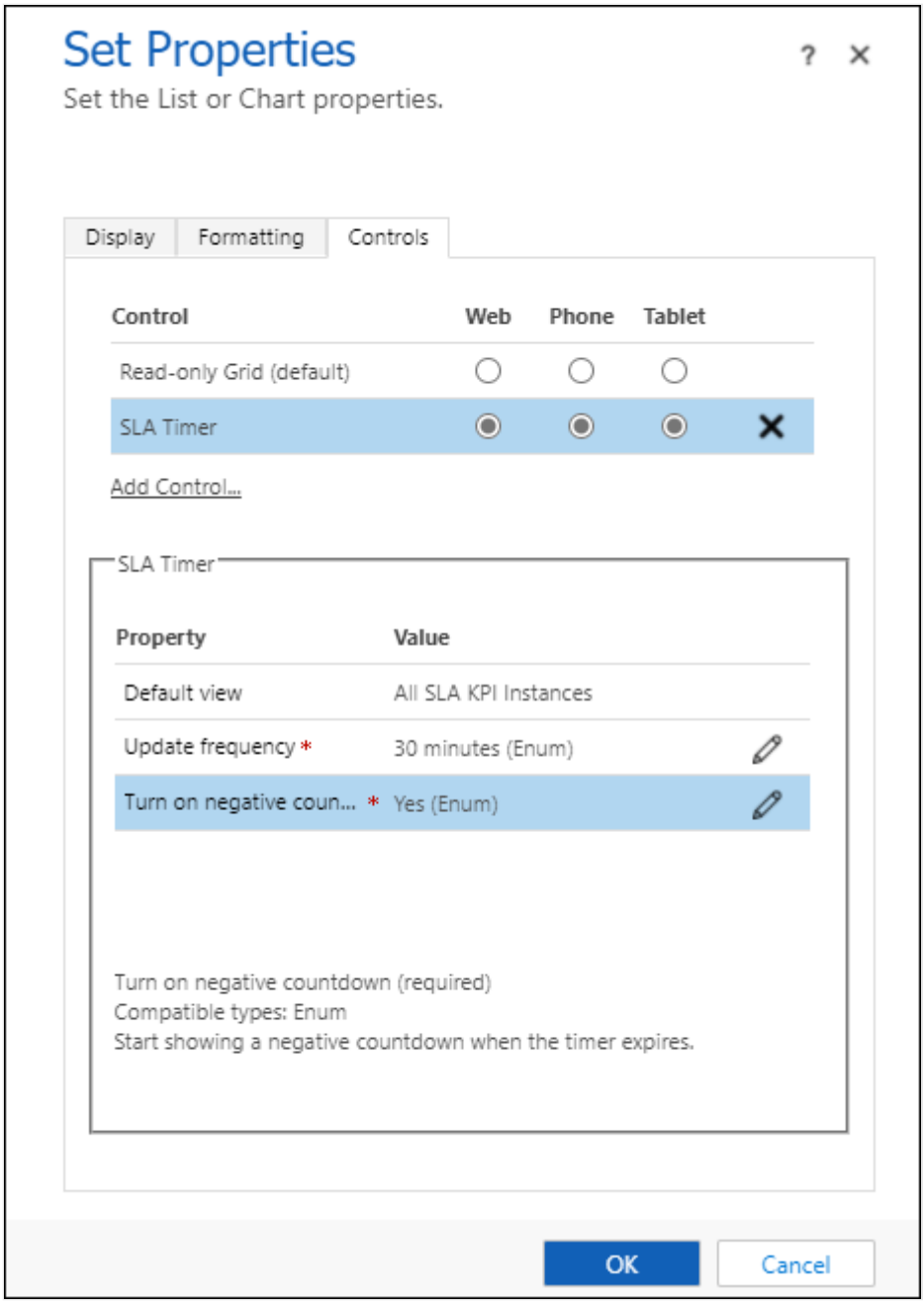


7. Save and publish the solution.

Enable elapsed time for SLA Timers in expired status

You can configure the negative countdown property for the SLA timer so that the timer continues to display the elapsed time after the SLA expires instead of showing the status. The setting needs to be configured for each SLA Timer instance.

1. After you add the SLA Timer control, set the **Turn on negative countdown** property as **Yes**.

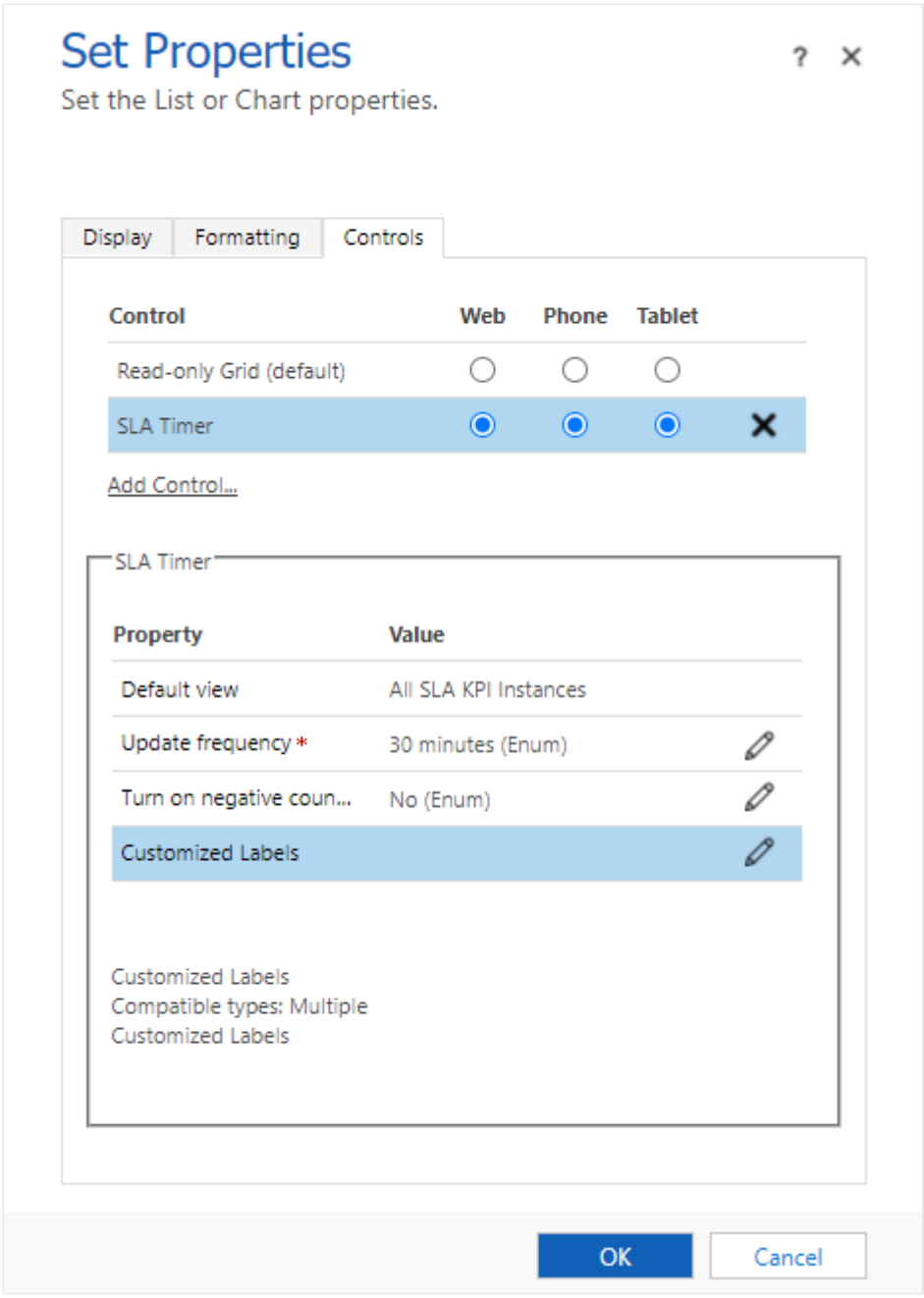


2. Save and publish the solution.

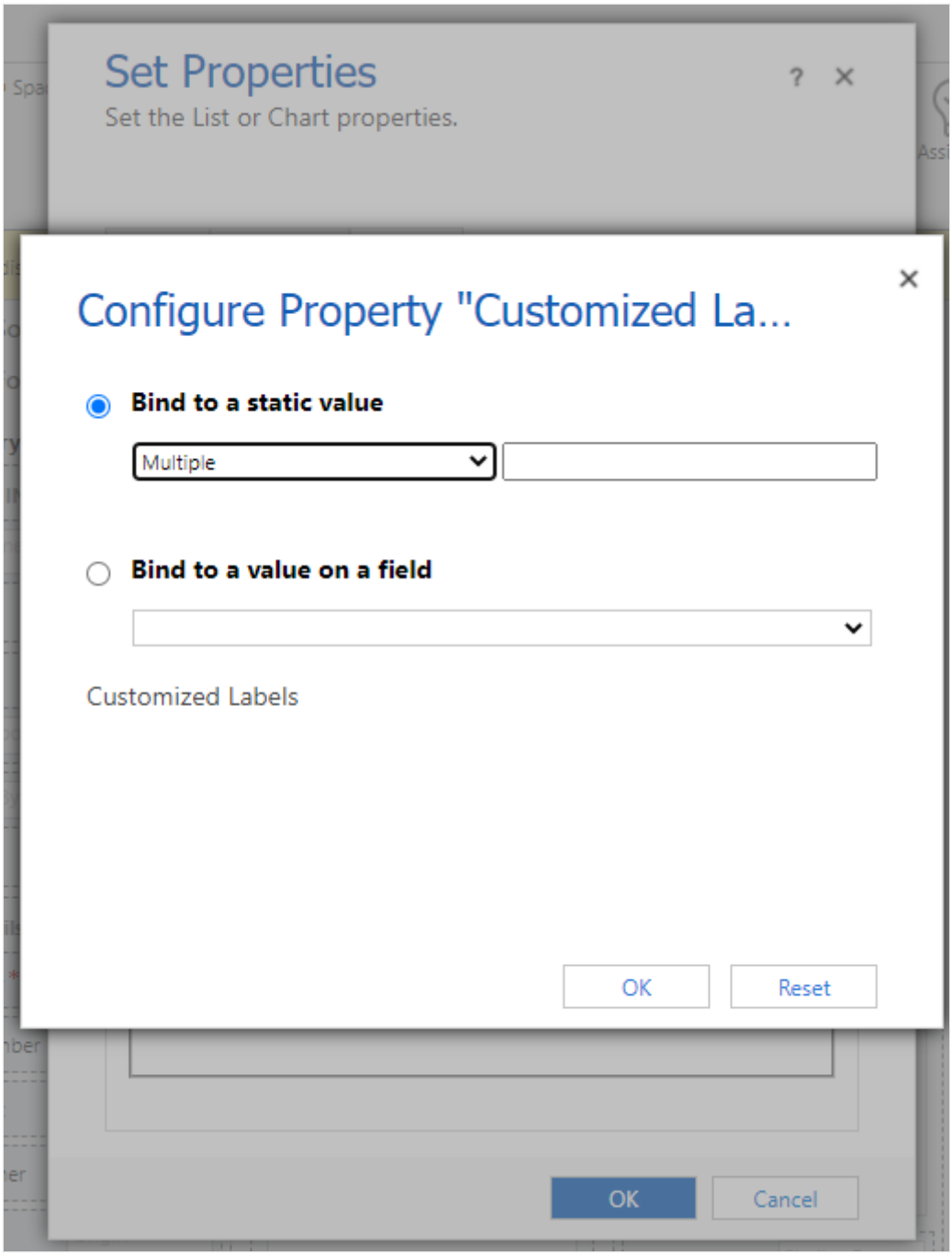
Customize the SLA timer control display label

After you've added the SLA timer control for a SLA-enabled entity, you can customize the labels of the status to be displayed for the timer control.

1. In the SLA Timer area, select **Edit** for **Customized Labels**.



2. In the **Configure Property "Customized Label"** dialog, select the **Bind to a static value** option and enter the values for multiple language codes.



- The language code value must be of the following format:

  `(language code1)=(KPI instance status value):(KPI instance custom label)`

  For example, 1033=1:Custom Noncompliant

- You can also enter multiple language codes by separating them with a semicolon:

  `(language code1)=(KPI instance status value):(KPI instance custom label); (language code2)=(KPI instance status value):(KPI instance custom label)`

  For example, 1033=1:Custom Noncompliant; 3:Paused

- If you need to create multiple language code sets, you must separate each set by selecting **Enter**. For example:

a. Enter `(language code1)=(KPI instance status value):(KPI instance custom label); (language code2)=(KPI instance status value):(KPI instance custom label)`

b. Select **Enter**.

c. Enter `(language code1)=(KPI instance status value):(KPI instance custom label); (language code2)=(KPI instance status value):(KPI instance custom label)`

- The customizable status codes are:
  - 1: Noncompliant
  - 3: Paused
  - 4: Succeeded
  - 5: Canceled
- To look up the language code, or to enable or disable a language, go to **Advanced Settings**>**Administration**>**Languages**.

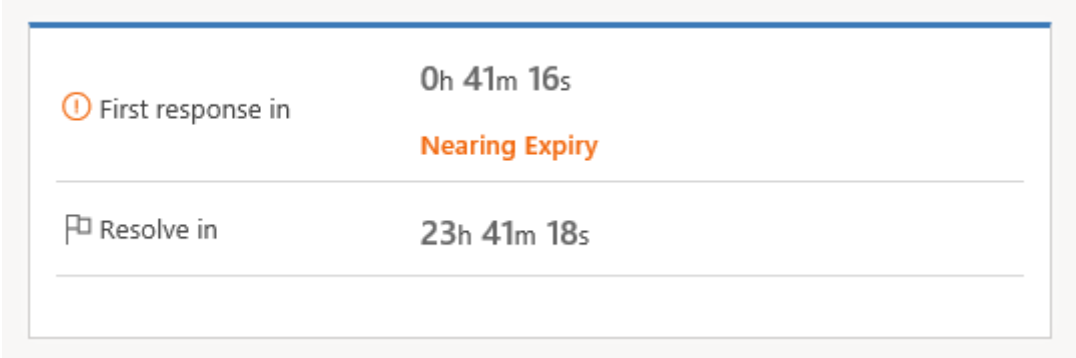
3. Select **OK**.
4. Save and publish the solution.

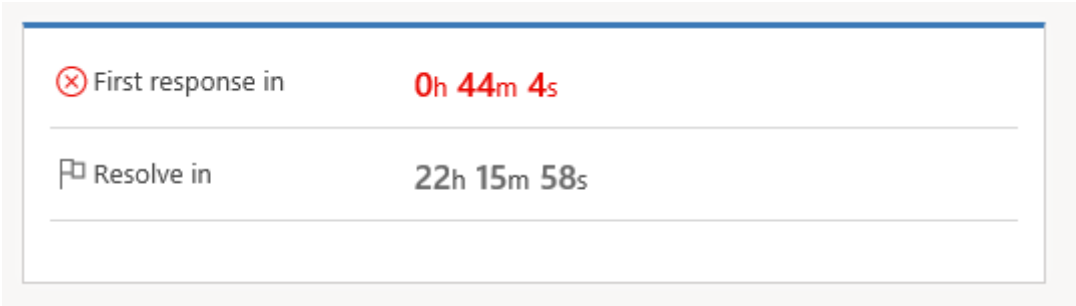
Add an out-of-the-box timer control to the Case form

On a case form, the timer control can show any of the following, depending on the actions of the customer service representative and what you specify when you set up the timer control:

- If the customer service representative completes the task within the remaining time, the control shows the word **Succeeded**.
- If the customer service representative doesn't complete the task within the remaining time, the control shows the word **Expired**.
- As the timer counts down, the color changes to yellow as the time remaining nears non-compliance. If the time remaining expires, the timer shows the word **Expired**. Then the timer color changes to red and the timer starts counting up to show the elapsed time since the task should have been completed. This behavior is optional.
- If a condition causes the milestone to be canceled, the control shows the word **Canceled**. This behavior is optional.

- If either of the required fields in the **Timer Control** dialog doesn't have a value in the record, the control shows the words **Not Set**.



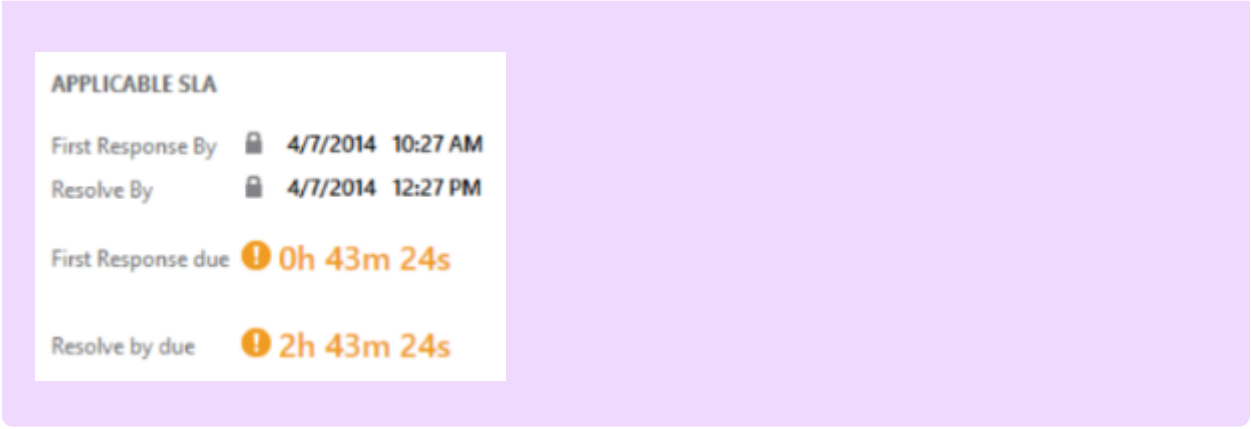


Important

- The instructions in this article apply if you're adding a timer to track time for the date/time field of any entity, or for tracking time against standard SLAs on case records. If you are using enhanced SLAs and want to add a timer to your forms, go to **Add a timer to forms to track time against enhanced SLAs**.
- The timer control is designed to visually show the current state or show the remaining or elapsed time relative to the date and time as specified in the **Failure Time** field of the SLA KPI Instance. It doesn't calculate or keep track of the time for which the Pause condition is true.

Note

The screens showcase the timer control on a Unified Interface app. On a legacy web client app, the timer control is displayed as follows:



More information: Understand SLA details with Timer control

Add an out-of-the-box timer control

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   ### Check your security role

   - Follow the steps in View your user profile.

2. Go to **Settings** > **Customizations**.

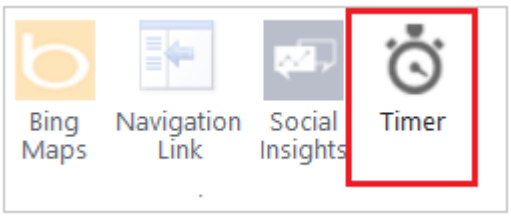
3. Select **Customize the System**.

4. In the solution explorer on the left pane, expand **Entities**, expand the **Case** entity, and select **Forms**.

   To add the timer to the form so the customer service representatives can use it in Customer Service Hub, open the case form of type **Main**.

5. Select on the form where you want to place the control. You can add it anywhere except the form header or footer.

6. On the **Insert** tab, in the **Control** group, select **Timer**.

7. In the **Timer Control** dialog, do the following:

   a. In the **General** section, type a name and label for the control.

b. Under **Data Source**, next to **Failure Time Field**, select the date-time field that represents the time when a milestone should be completed. For example, select the **First Response By** field.

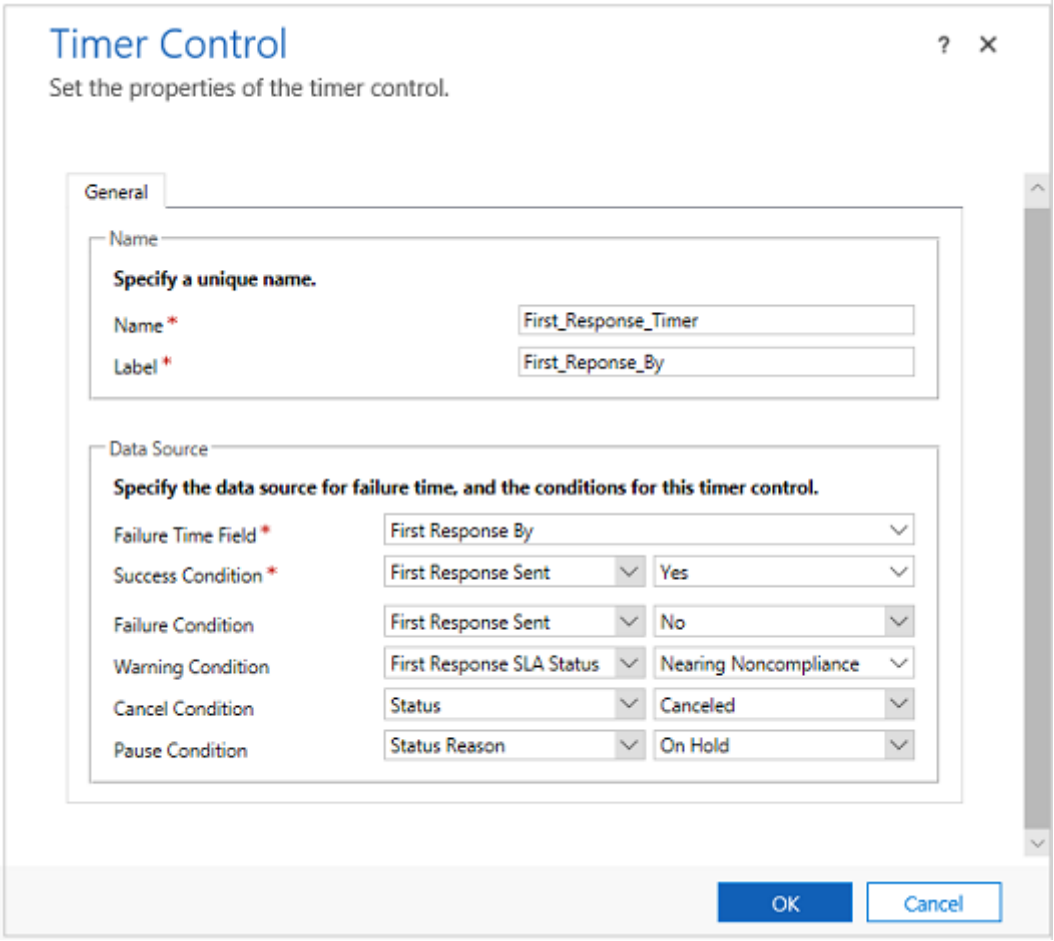
c. Next to **Success Condition**, select a field to use to evaluate the success of the milestone, and then select the condition that indicates success. For example, select the **First Response Sent** field, and then select **Yes** to indicate the success criteria of the First Response metric. This setting is required.

d. Next to **Failure Condition**, select a field to use to evaluate the failure of the milestone, and then select the condition that indicates the failure. For example, in the first drop-down list, select **IsEscalated**. In the second drop-down list, select **Yes**.

e. Next to **Warning Condition**, enter the condition that will cause the timer control to display a warning when the time is about to expire. For example, in the first list next to **Warning Condition**, select **First Response SLA Status**. In the list to the right, select **Nearing Noncompliance**. This setting is optional.

f. Next to **Cancel Condition**, select a field to evaluate whether the achievement of the milestone should be canceled. Then choose the option that indicates the milestone is canceled. This setting is optional.

g. Next to **Pause Condition**, enter the condition that will cause the timer to pause the count down. For example, you want the timer to pause the count down every time the case status is set to “On-hold”. For this, in the first drop-down list, select **Status**. In the second drop-down list, select **On-hold**.



8. Select **OK** to add the control to the form.

Notes

- The timer control refreshes on the **OnChange** form event, and also when the form is loaded.
- You can add a timer control to a form based on any record type (entity), including custom record types.
- You can add multiple timer controls for different key performance indicators (KPIs).
- You can add a timer control to any Main or Main - Interactive experience form of other entities, but timer controls are not displayed in Dynamics 365 for tablets.

See also

Configure service level agreements

Set and enable languages

Add a timer in forms to track time against enhanced SLAs

Understand SLA details with Timer control

Export and import a solution with SLAs

Article • 06/16/2022

You can replicate the SLA settings in another environment by exporting the solution containing the SLAs. During the export, all the related components and their dependencies will also be exported.

You can also export or import a calendar with its corresponding SLAs by enabling the calendar import and export option.

Export or import a calendar with SLAs

You can enable the export or import of a calendar either from the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Service terms** in **Operations**. The **Service Terms** page appears.
   b. In the **Other SLA Settings** section, select **Manage**. The **Service Configuration Settings** page appears.

2. On the **Service Configuration Settings** page, go to the **Calendar Export and Import** section and set the **Enable calendar export and import** toggle to **Yes**. By default, the option is set to **No**.

3. Select **Save**.

> **Important**
>
> - When you delete a solution that contains SLAs, the SLAs are also deleted. However, their corresponding calendars aren't deleted.
> - Calendars, when imported to the target organization, are editable. However, we recommend that you make any changes to the calendar through the solution import or export process.
> - Calendars are overwritten when a solution is imported. So, the calendar in the latest solution that's being imported will overwrite existing customizations or

settings on the current calendar in the target environment.

- Exported calendars will be present in XML format in the Calendars folder within the exported solution.
- SLA Items will automatically be linked to the corresponding imported calendars on import.

Recommended procedure for upgrading a solution

We recommend that you perform the following steps to upgrade a solution:

1. Deactivate the SLAs that have been brought through the previous version of the solution. The status of these SLAs will change to Draft.
2. Upgrade your solution.
3. After the solution has been successfully upgraded, activate the SLAs as required.

See also

Enable entities for service-level agreements
Troubleshoot issues in SLAs

System Settings Service tab

Article • 02/15/2022

Use this tab to set preferences for the customer service area, such as service level agreements and entitlements in model-driven apps in customer engagement apps (Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, Dynamics 365 Marketing, and Dynamics 365 Project Service Automation).

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   Check your security role.

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. In the web app, go to **Settings** ( ) > **Advanced Settings**.
3. Select **Settings** > **Administration**.
4. Select the **System Settings** > **Service** tab.

> **Note**
>
> With the version 9.1 release, service configuration settings in service management are available in the Customer Service Hub based on the Unified Interface experience. You are recommended to manage service configuration settings using the new experience.
> In the Customer Service Hub app, go to **Service Management** and select **Service Terms** > **Service Configuration Settings** in the sitemap to access the Service configuration settings.

Settings	Description
Disable SLAs	
Disable Service Level Agreements(SLAs) on SLA-enabled entity records	SLAs are enabled by default. You can enable or disable them for SLA-enabled entity records in your organization. For example, you might want to disable SLAs during maintenance activities or when you're importing records and you don't want the SLAs to apply to the records. To disable, select **Yes**. To enable, select **No**. **Note:** When SLAs are disabled, SLA records can still be created or modified. SLAs won't be applied to records, however.

Settings	Description
Apply SLA after manual override	
Automatically apply SLA on entity record update after SLA was manually applied **Important:** For organizations, this feature is available only if your organization has installed Dynamics CRM Online 2016 Update. Interested in getting this feature? Find your administrator or support person.	This setting determines if an SLA should automatically be applied to a record when an SLA is manually selected in the record's SLA field. The automatic SLA application can either be through the entitlement applied to the case(for theCase entity) or with the default SLA. Either way, the manual SLA takes precedence over any other way of SLA application. When set to **No**, SLAs won't be applied automatically to records after an SLA is manually applied. **Note:** For Case entity records, when both entitlement and customer, and manual SLA are changing, the manual SLA is used regardless of this setting.
Select SLA Pause Status	
Select the SLA enabled entity to choose status values for	Select the SLA-enabled entity you want to choose the pause status for. **Important:** This feature of enabling other entities for SLA was introduced in CRM Online 2016 Update 1 and CRM 2016 SP1. Interested in getting this feature? Find your administrator or support person
For the selected entity, choose the status values that SLA calculation should pause for	Select the statuses for which the SLA calculation should be paused. Double-click the statuses in the **Available Values** column. When the user sets a record to one of the pause status values you set here, customer engagement apps pauses the SLA calculation. When the user changes the status of the case back to a status other than a pause status, customer engagement apps updates the failure and warning time in the enhanced SLA KPIs. It also tracks the total time for which a record is in the pause status. **Important:** This feature of enabling other entities for SLA was introduced in CRM Online 2016 Update 1 and CRM 2016 SP1. Interested in getting this feature? Find your administrator or support person
Automatically apply entitlement	- Select whether to automatically apply the default customer entitlement when a case is created. - Select whether to automatically apply the default customer entitlement when a case is updated and the customer, contact, or product field has changed.

See also

Learn the basics of the Customer Service Hub

Recalculate SLAs in terminal status

Article • 10/13/2023

SLAs in terminal status are recalculated in the following scenarios:

- If the SLA KPI instance is in an expired state and the applicable when or success condition changes, the SLAs are recalculated if the recalculate flag is on.
- SLA KPI instances that are in succeeded or canceled terminal states remain in the same state irrespective of changes to the applicable from or when conditions if the recalculate SLA option is set to no. Changes occur only if the recalculate SLA option is set to yes.
- When a SLA KPI instance is in an expired state and changes are made to its applicable SLA item, the SLAs are recalculated. A new slakpiinstance is created, and its status depends on the failure time. Failure time is calculated from the applicable from field. If the SLA KPI Instance has passed the specified failure time, it creates a new slakpiinstance in an expired state.
- By default, SLAs in the succeeded and noncompliant terminal statuses aren't reevaluated when the success condition changes or can't be paused or resumed. However, you can recalculate such SLAs when the applicable when and success criteria of the target entity changes by enabling the recalculate SLA setting in the **Service Configuration Settings** view.

Enable recalculation of SLAs on reaching terminal status

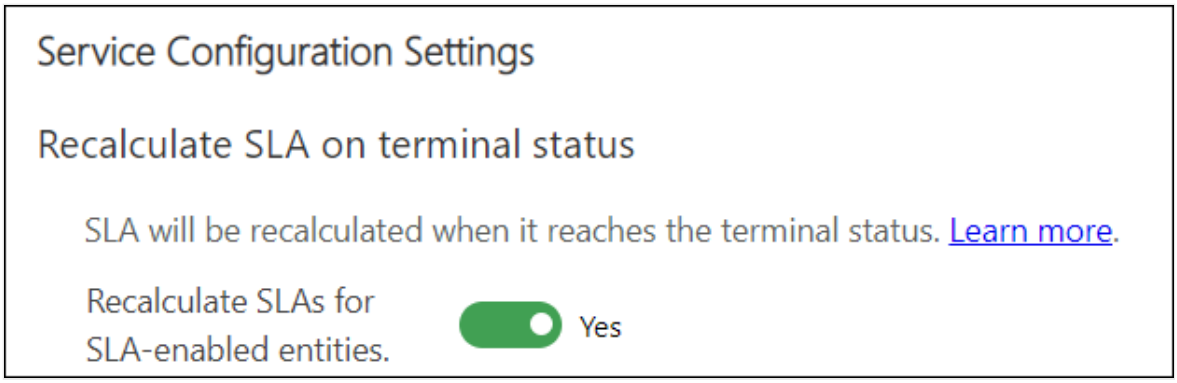
You can enable the recalculation of SLAs that reach the terminal status in the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Terms** in **Operations**.
   b. In the **Other SLA Settings** section, select **Manage**. The **Service Configuration Settings** view is displayed.

2. In **Recalculate SLA on terminal status**, switch the toggle to **Yes**, and select **Save**.



See also

Define service-level agreements
Apply SLAs Enable records for SLA

Enable custom time calculation of SLA KPIs

Article • 01/18/2023

This article describes how you can override the default time calculation.

Time calculation in service-level agreements (SLAs) calculates the `WarningTime` and `FailureTime` of SLA key performance indicators (KPIs), taking into consideration input parameters, such as `ApplicableFrom` (StartTime of type DateTime field), `CalendarId` (GUID), and `Duration` (warning duration or failure duration in minutes). The final `WarningTime` or `FailureTime` is calculated based on the customer service schedule and the holiday schedule associated with the SLA item.

In addition to warning and failure time, the elapsed time is also calculated if there's a pause and resume scenario configured for the SLA. To ignore the working hours spent during the paused state of the SLA KPI, the elapsed time gets added to the final failure time.

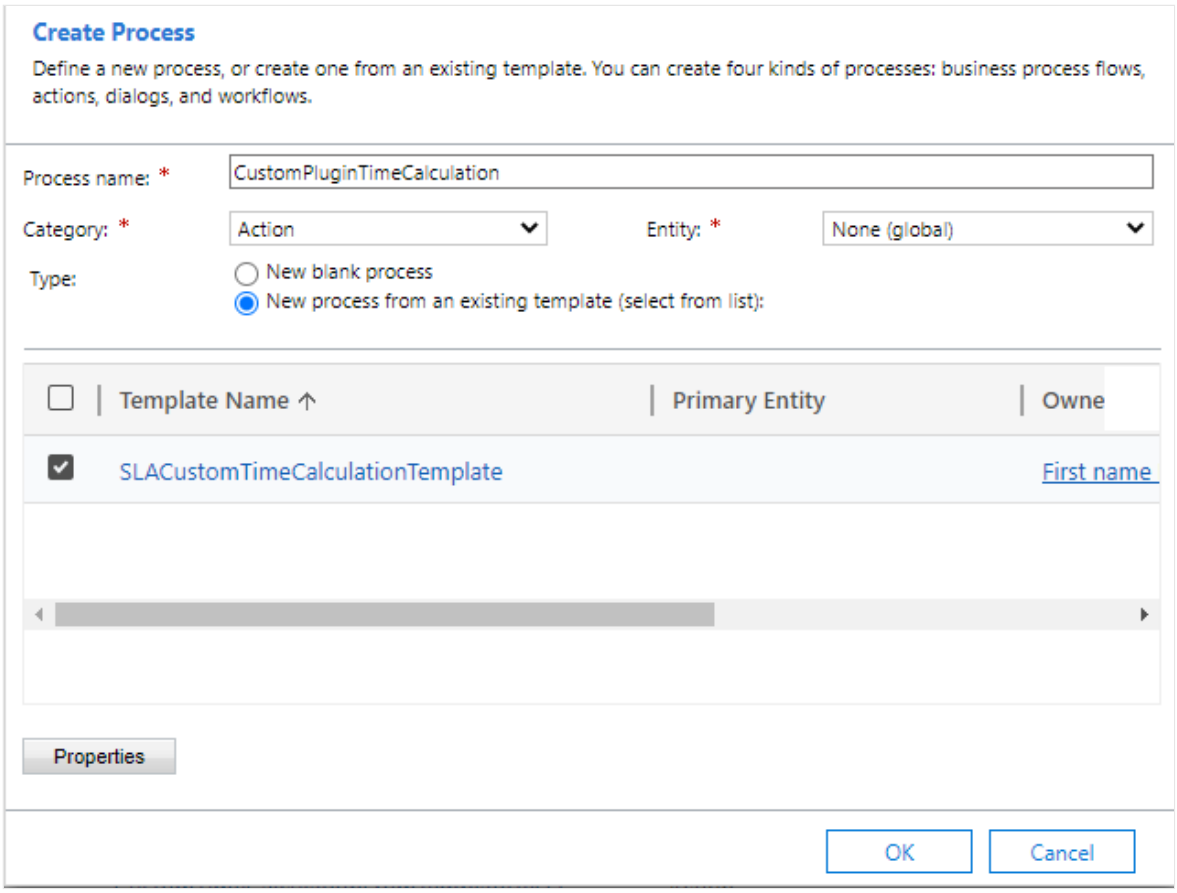
To enable your own custom time calculation, define an API interface that has a fixed set of input and output parameters, and add a custom logic to calculate the time.

> **Note**
>
> Custom time calculation is only supported as part of plug-in and not any other entity, for example, custom workflow.

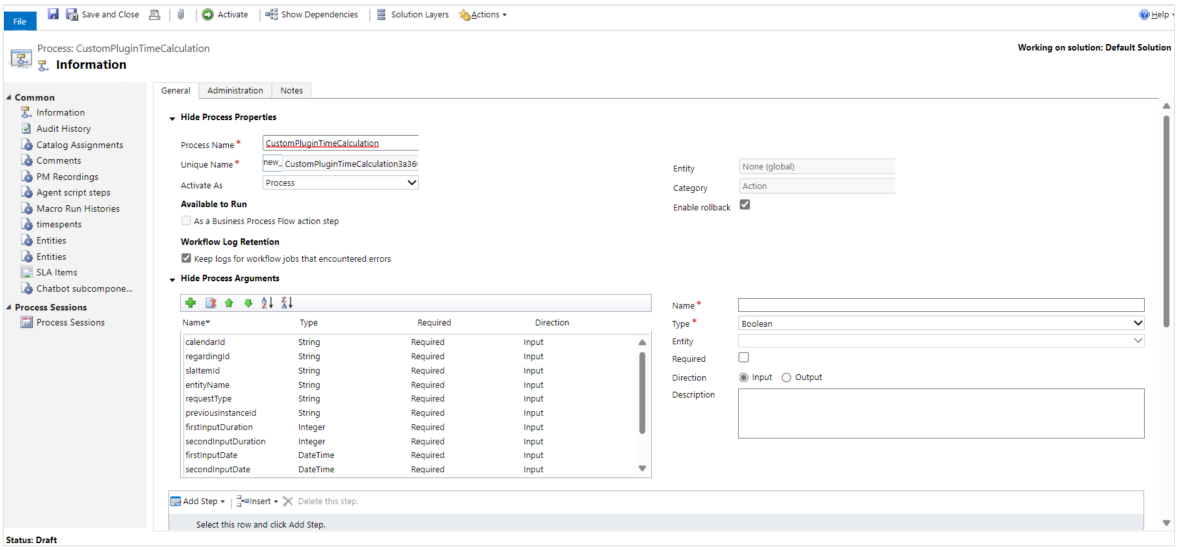
Enable custom time calculation of SLA KPIs

1. Go to make.powerapps.com.
2. Go to **Advanced Settings** > **Customizations** > **Customize the system** > **Processes** > **New**.
3. In the **Create Process** dialog, enter the following details:
   a. Enter a process name, for example, CustomPluginTime Calculation.
   b. From the **Category** dropdown list, select **Action** .
   c. From the **Entity** dropdown list, select **None (global)**.
   d. Select the **New process from an existing template (select from the list)** option.
   e. Select the **SLACustomTimeCalculationTemplate** template from the list.

f. Select **OK**.



4. On the template, add the required parameters (if any) and select **Activate**.



5. Write the plug-in.

   For information on selecting the plug-in that you need, go to Scenarios and plug-ins.

6. Go to the Plug-in registration tool and register the plug-in that you created with your organization, to link it to the custom action created in step 3.

   For information on registering a plug-in, go to Register a plug-in.

7. In Customer Service admin center, add or edit the previously created custom action with the SLA Item:
   a. Set the **Allow Custom Time Calculation** toggle to **Yes**.
   b. In the **Custom Time Calculation Process** field, select the custom action created in step 3.
   c. Select **Save and Close**.

8. On the SLA form, select **Activate**, and apply it to the required entity. The warning and failure time of the SLA KPI appears in accordance with the time calculation logic provided in the custom action.

   For information on how to apply SLAs, go to Apply SLAs

9. To export the solution to another environment, first add the SLA (whose item has the custom action reference) to the custom solution. Adding the SLA will also export the custom action workflow process. Next, include the SDK message in the solution, which will export the plug-in you created earlier.

Scenarios and plug-ins

Refer to the following scenarios and their plug-ins to implement a plug-in code associated with your custom action.

Scenario 1:

If you don't have a pause or resume scenario, only the `WarningTime` and `FailureTime` are to be calculated. Whenever any new KPI instances get created, SLA initiates the custom time calculation API to calculate only `WarningTime` and `FailureTime` in a single call.

In such a case, `requestType` will be `getEndTime`, and other attributes can be fetched as defined in the following example:

```
```

```
public void Execute(IServiceProvider serviceProvider)
{

    IPluginExecutionContext context =
(IPluginExecutionContext)serviceProvider.GetService(typeof(IPluginExecutionC
ontext));
    IOrganizationServiceFactory factory =
(IOrganizationServiceFactory)serviceProvider.GetService(typeof(IOrganization
ServiceFactory));
    _service = factory.CreateOrganizationService(context.UserId);

    // Step 1: Retrieving Input Parameters.
    string regardingId = context.InputParameters["regardingId"] as string;
    string calendarId = context.InputParameters["calendarId"] as string;
    string requestType = context.InputParameters["requestType"] as string;
    string slaItemId = context.InputParameters["slaItemId"] as string;
    string entityName = context.InputParameters["entityName"] as string;


    try
    {
        // implement this requestType for any new SLA KPi instance creation.
        if (requestType.Equals("getEndTime",
StringComparison.CurrentCultureIgnoreCase))
        {
            int warningDuration =
(int)context.InputParameters["firstInputDuration"];
            int failureDuration =
(int)context.InputParameters["secondInputDuration"];
            DateTime warningStartTime =
(DateTime)context.InputParameters["firstInputDate"];
            DateTime failureStartTime =
(DateTime)context.InputParameters["secondInputDate"];

            // Step 2 : Add the custom Logic to calculate the WarningTime
and FailureTime
            string returnCalendarId =
CalculateWarningAndFailureTime(regardingId, calendarId, slaItemId,
entityName, warningStartTime, failureStartTime, warningDuration,
failureDuration, out DateTime warningTime, out DateTime failureTime);

            // Step 3 : return the output values.
            context.OutputParameters["firstOutputValue"] =
DateTime.SpecifyKind(warningTime, DateTimeKind.Utc).ToString();
            context.OutputParameters["secondOutputValue"] =
DateTime.SpecifyKind(failureTime, DateTimeKind.Utc).ToString();
            context.OutputParameters["returnCalendarId"] = returnCalendarId;
            return;
        }

        // implement this requestType for finding Paused time for any new
SLA KPi instance after it resumed.
        if (requestType.Equals("getElapsedTime",
StringComparison.CurrentCultureIgnoreCase))
```

```
        {
            DateTime casePausedTime =
(DateTime)context.InputParameters["firstInputDate"];
            DateTime caseResumedTime =
(DateTime)context.InputParameters["secondInputDate"];
            int existingElapsedTime =
(int)context.InputParameters["firstInputDuration"];
            // Step 2 : Add the custom Logic to calculate the elapsedTime
between startTime(paused) and endTime(resumed)
            double elapsedTimeInMinutes = CalculateElapsedTime(regardingId,
calendarId, slaItemId, entityName, casePausedTime, caseResumedTime,
existingElapsedTime);

            // Step 3 : return the output values.
            context.OutputParameters["firstOutputValue"] =
elapsedTimeInMinutes.ToString();
            context.OutputParameters["secondOutputValue"] =
elapsedTimeInMinutes.ToString();
            return;
        }
    } catch (Exception ex) {
        return;
    }

    throw new Exception("Invalid requestType:" + requestType+ " for
entityName:" + entityName + " of id:" + regardingId);
}

// in this example, we're using Custom Field(new_country) on the Case entity
to apply the required calendar.

private string CalculateWarningAndFailureTime(string regardingId, string
calendarId, string slaItemId, string entityName, DateTime warningStartTime,
DateTime failureStartTime, int warningDuration, int failureDuration, out
DateTime warningTime, out DateTime failureTime)
{
    OrganizationResponse customizedTimeCalculationResponse;
    warningTime = DateTime.UtcNow;
    failureTime = DateTime.UtcNow;
    int newWarningTime = warningDuration;
    int newFailureTime = failureDuration;
    int customCode = 0;

    // Step 1: fetch the Case Entity record
    Entity caseRecord = FetchCaseRecord(entityName, regardingId);

    if (caseRecord.Attributes.Contains("new_country"))
    {
        customCode = (int)(((OptionSetValue)
(caseRecord.Attributes["new_country"])).Value);

        // Example 1: Override calendar at runtime: Choose Calendar based on
any custom logic
        if (customCode == 0)
        {
```

```
            // fetch IST calendar & override CalendarId
            IST_CALENDAR = FetchCalendar("IST_CALENDAR", _service);
            calendarId = IST_CALENDAR;
        }
        else if (customCode == 1)
        {
            // fetch PST calendar & override CalendarId
            PST_CALENDAR = FetchCalendar("PST_CALENDAR", _service);
            calendarId = PST_CALENDAR;
        }
    }
    // use OOB SLATimeCalculation Custom Action to do actual calculation_
    OrganizationRequest requestTimeCalculation = new
OrganizationRequest("msdyn_SLATimeCalculation");

    requestTimeCalculation["requestType"] = "getEndTime";
    requestTimeCalculation["calendarId"] = calendarId;

    // calculate warning time
    if (warningDuration != -1)
    {
        requestTimeCalculation["startTime"] = warningStartTime;
        requestTimeCalculation["minutes"] = newWarningTime;
        customizedTimeCalculationResponse =
_service.Execute(requestTimeCalculation);
        customizedTimeCalculationResponse.Results.TryGetValue("returnValue",
out object outputValue1);
        warningTime =
DateTime.SpecifyKind(DateTime.Parse((string)outputValue1),
DateTimeKind.Utc);
    }

    // calculate Failure time
    if (failureDuration != -1)
    {
        requestTimeCalculation["startTime"] = failureStartTime;
        requestTimeCalculation["minutes"] = newFailureTime;
        customizedTimeCalculationResponse =
_service.Execute(requestTimeCalculation);
        customizedTimeCalculationResponse.Results.TryGetValue("returnValue",
out object outputValue2);
        failureTime =
DateTime.SpecifyKind(DateTime.Parse((string)outputValue2),
DateTimeKind.Utc);
    }

    return calendarId;
}
```

Scenario 2:

If there's a pause or resume scenario, the following calculations are to be made:

- Calculation of `elapsedTime` between paused and resumed states. For this scenario, the SLA invokes the custom time calculation API to calculate the elapsed time between the pause and resume. In such a case, the requestType will be `getElapsedTime` and other attributes can be fetched as defined in the plug-in code example.
- Calculation of new `WarningTime` and `FailureTime` computation for resumed instances. In this case, `requestType` will be `getEndTime` and other attributes can be fetched as defined in the following example:

```
private double CalculateElapsedTime(string regardingId, string calendarId,
string slaItemId, string entityName, DateTime casePausedTime, DateTime
caseResumedTime, int existingElapsedTime)
{
    if (caseRecord.Attributes.Contains("new_country"))
    {
        if ((int)(((OptionSetValue)
(caseRecord.Attributes["new_country"])).Value) == 0)
        {
        // fetch IST id
        IST_CALENDAR = FetchCalendar("IST_CALENDAR", _service);
        calendarId = IST_CALENDAR;
        }
        else if ((int)(((OptionSetValue)
(caseRecord.Attributes["new_country"])).Value) == 1)
        {
        // fetch PST  id
        PST_CALENDAR = FetchCalendar("PST_CALENDAR", _service);
        calendarId = PST_CALENDAR;
        }
    }

    // use OOB SLATimeCalculation Custom Action to do actual calculation_
    OrganizationRequest requestTimeCalculation = new
OrganizationRequest("msdyn_SLATimeCalculation");
    requestTimeCalculation["startTime"] = casePausedTime;
    requestTimeCalculation["endTime"] = caseResumedTime;
    requestTimeCalculation["requestType"] = "getElapsedTime";
    requestTimeCalculation["calendarId"] = calendarId;

    // calculate elapsed time
    customizedTimeCalculationResponse =
_service.Execute(requestTimeCalculation);
    customizedTimeCalculationResponse.Results.TryGetValue("returnValue", out
object outputValue1);
    double totalElapsedTime = existingElapsedTime +
Double.Parse(outputValue1.ToString());
    return totalElapsedTime;
}
```

Error codes for custom time calculation

The following are the error codes for the various error scenarios that might occur during custom time calculation.

Error code: 10000004

Error message: "Workflow for the Custom Time Calculation API for SLA Item {0} must be active."

Reason

The error occurs if the Custom Time Calculation Workflow is disabled.

Resolution

When opening the SLA, you'll see a form notification along with an **Activate** button if the SLA is active but the Custom Time Calculation Workflow is disabled. To avoid this issue, make sure that the Custom Time Calculation Workflow process is always in **Active** state. Perform the SLA deployment, and then verify only after it has completed. Make sure that you don't delete or deactivate the workflow process manually or through customization.

Error code: 10000005

Error message: "Select the Custom Time Calculation Process."

Reason

The error occurs if the Custom Time Calculation Workflow is enabled but no workflow process action is associated with the SLA Item.

Resolution

Add the workflow process and save the SLA item. To avoid this issue, make sure that the Custom Time Calculation Workflow process is filled in the lookup value if the toggle is set to **On**.

Error code: 10000006

Error message: "Workflow for the Custom Time Calculation Process for SLA Item {0} is missing. {Placeholder="{0}"} refers to the SLA Item ID."

Reason

The error occurs if the Custom Time Calculation Workflow is enabled during SLA activation and the workflow process action is associated with the SLA Item with valid GUID but the workflow is deleted.

Resolution

You must correct the invalid workflow. Remove the existing workflow from the SLA Item, create a new workflow, and then add the new workflow to the same SLA item. To avoid this issue, make sure you don't delete any workflow manually or as part of the deployment process. Also, make sure to verify your changes before importing directly to a production environment.

Error code: 10000007

Error message: "Plugin implementation is missing for the Custom Time Calculation Process in SLA Item {0} {Placeholder="{0}"} refers to sla item id."

Reason

The error occurs if the Custom Time Calculation Workflow is enabled but the associated plugin SDK messaging process step is missing or the plugin isn't registered.

Resolution

Make sure to add the SDK step while exporting the SLA from the source or development environment. To avoid this issue, make sure that you add the SDK message step and plugin assembly in the SLA solution.

Error code: 10000008

Error message: "Warning or the failure time returned by Custom Time Calculation Process for the SLA Item {0} is invalid. {Placeholder="{0}"} refers to sla item id."

Reason

The error occurs if the Custom Time Calculation Workflow action returns an invalid **Failure Time** for **requestType getEndTime**.

Resolution

You'll need to debug to find out why the custom workflow process isn't returning proper values. To avoid this issue, make sure that you add and test all the scenarios before deploying the scenarios to production. For example, this includes various SLA item applications and Pause or Resume scenarios.

Error code: 10000009

Error message: "Elapsed Time returned by Custom Time Calculation Process for the SLA Item {0} is invalid. {Placeholder="{0}"} refers to sla item id."

Reason

The error occurs if the Custom Time Calculation Workflow action returns an invalid **Elapsed Time** for **requestType getElapsedTime**.

Resolution

You'll need to debug to find out why the custom workflow process isn't returning proper values when the case was paused and resumed. To avoid this issue, make sure you add and test all the scenarios before deploying the scenarios to production. For example, this includes Pause or Resume scenarios.

Error code: 10000010

Error message: "Workflow for the Custom Time Calculation Process {0} for SLA Item {1} is not found."

Reason

The error occurs if the custom action for custom time calculation isn't found in the system.

Resolution

You'll need to debug and find out if the custom action is present in the system with the same name as shown in the error. To avoid this issue, make sure that you create the same custom action name prefix as shown in the error message. You need to change the prefix of your solution or avoid exporting it as an unmanaged solution. You can also avoid creating the workflow interface directly in the managed solution, and instead create the managed solution in default customization and then add it to the solution.

FAQ

For more information about custom time calculation of SLA KPIs, go to FAQ about custom time calculation of SLA KPIs.

See also

Define service-level agreements

Apply SLAs

Enable records for SLA

Enable custom recalculation of SLA KPIs

Article • 03/17/2023

Introduction

Time calculation in service-level agreements (SLAs) is dependent on SLA key performance indicators (KPIs) and input parameters. More information: Time calculation of SLA KPIs

Changes in the associated customer service schedule and holiday schedule don't affect the existing SLA KPIs unless one of the following events occurs:

- The SLA KPI is paused and resumed.
- The SLA on an entity instance is updated.
- The SLA item is updated.
- The SLA KPI instance is reapplied after terminal state in recalculation.

Enable the custom recalculation on a target entity

You can trigger the recalculation of active SLA KPI instances that have a status of either **In Progress** or **Nearing Noncompliance** and create new SLA KPIs by explicitly calling the custom action `msdyn_ManageSLAInstances` independent of the events mentioned previously.

> **Note**
>
> This doesn't affect the SLA KPI instances that have a status of **Paused**, **Cancelled**, **Succeeded**, or **Non-compliant**.

To enable custom recalculation and create new SLA KPIs, you must set the integer value of the **Recalculate** parameter to **1** through custom plug-in code. By default, the integer value of the **Recalculate** parameter is **0**. You can set the integer value by creating custom plug-in code on the SLA's target entity and implementing the custom logic based on which the custom action will be initiated. More information: Write a plug-in

For example, if you want to recalculate the SLA KPIs that have a status of **In progress** or **Nearing Noncompliance**, on updating the **Case Type** field on the Case entity, you'll need to create a custom plug-in and register it on the Case update for the **Case**

Type field. On updating the **Case Type** field, you'll need to call the custom action in your custom plug-in code. The previous SLA KPI instances will be canceled, and new instances will be created.

Following is an example of the plug-in code:

OrganizationRequest

```
customEvaluation["SLAId"] = "<sla id>";
customEvaluation["RegardingId"] = <case id>;
customEvaluation["EntityLogicalName"] = "incident";//logical name of case
entity
customEvaluation["Recalculate"] = 1;

OrganizationResponse customEvaluationResponse =
service.Execute(customEvaluation);
```

See also

Define service-level agreements
Apply SLAs Enable records for SLA FAQ about custom time calculation of SLA KPIs

Create entitlements to define support terms

Article • 10/12/2023

Define what kind of support your customers are eligible for by creating entitlements in Dynamics 365 Customer Service. With entitlements, you specify the support term based on number of hours or number of cases. The customer's support level can vary based on the product or service that the customer has purchased. Customers who've purchased different products can be entitled to different support levels. This information helps the customer support agents verify what the customers are eligible for and create cases for them accordingly.

> **Note**
>
> With the latest release of Dynamics 365 Customer Service app, entitlements in service management are available in the Customer Service Hub. We recommend that you create and manage entitlements using the new experience.

Create an entitlement

You can create an entitlement in the Customer Service admin center or Customer Service Hub app.

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions. You can check your security permissions by following the steps in View your user profile.

2. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service terms** in **Operations**. The **Service Terms** page appears.

   b. In the **Entitlements** section, select **Manage**.

      The **All Entitlements** view is displayed. You can switch between various system views using the drop-down list.

3. To create an entitlement from a template, select **New** > **From Template**. In the **Select Template** dialog box, select the entitlement template, and select **Select**.

   To create an entitlement from scratch, select **New** > **Blank Entitlement**.

4. Fill in your information. Use the handy tooltips as a guide.

   - In the **Information** section, specify the basic details:
     - **Name**: Give the entitlement a meaningful name.
     - **Primary Customer**: Choose the customer you're creating this entitlement for.
     - **Start Date**: Choose the date from which the customer will be entitled for support.
     - **End Date**: Choose the date after which the customer will no longer be entitled for support.
     - **Restrict based on entitlement terms**: Select **Yes** to make sure that cases aren't created when the entitlement term is over. Agents won't be able to create cases when **Remaining Terms** is less than zero or when the term remaining for a channel is less than zero.

       If you select **No**, agents will be able to create cases, but **Remaining Terms** is updated to a negative value.
     - **SLA**: Choose a service level agreement (SLA) record to associate the service levels or key performance indicators for the support you're providing with this entitlement.
     - **Owner**: Specify the owner of the entitlement.
     - **Description**: Write a brief description of the entitlement.
   - In the **Entitlement Terms** section, specify the term details for the entitlement:
     - **Allocation Type**: Choose whether the entitlement is for number of hours or number of cases.
     - **Decrease Remaining On**: Choose whether to decrease the remaining term on case creation or resolution.

       If you decrease the remaining term based on case creation:

- Creating or updating a case with the associated entitlement decreases entitlement terms
- Canceling a case with the associated entitlement increases entitlement terms
- Reactivating a canceled case with the associated entitlement decreases the entitlement terms

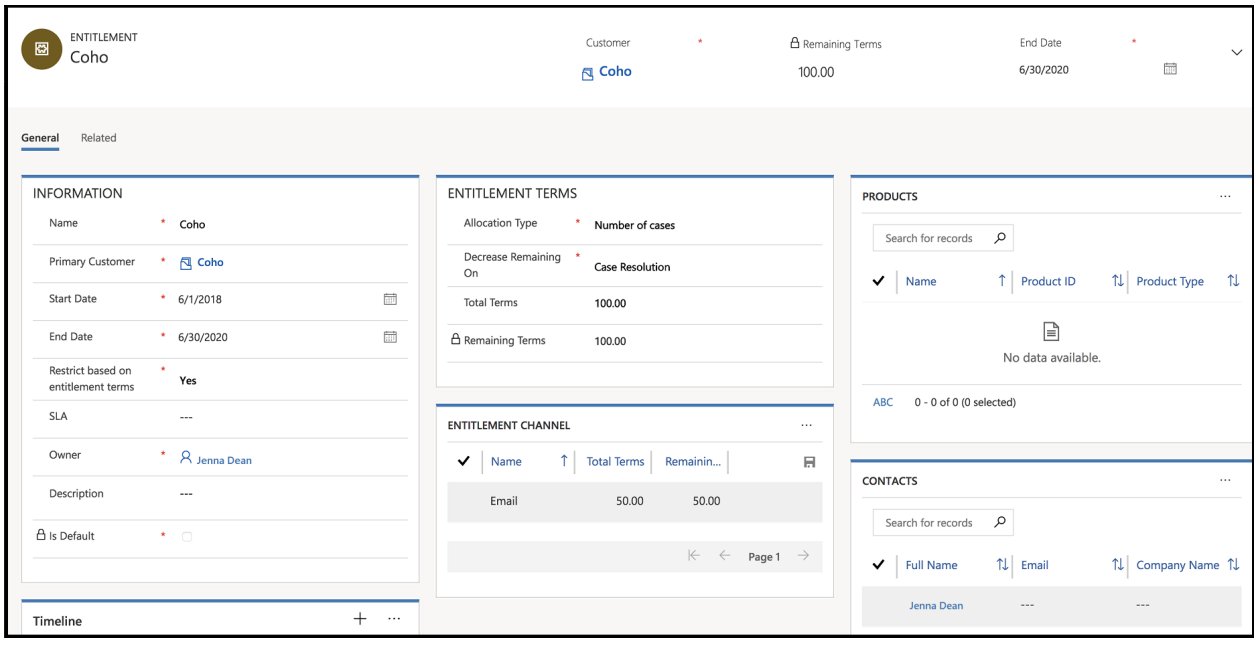
  If you decrease the remaining term based on case resolution:

- Resolving a case with the associated entitlement decreases the entitlement terms
- Reactivating a resolved case with the associated entitlement increases the entitlement terms.

- **Total Term**: Specify the total amount of support the customer is entitled to with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in **Total Term**, the customer is entitled to support up to 100 cases.
- The **Remaining Term** shows the total number of hours or cases remaining for the customer's entitlement. The value decreases every time a case is created or resolved (depending on what you select in **Decrease Remaining On**) against the entitlement.

5. Select **Save**.

When you save the entitlement, additional sections are added for a new entitlement, such as Entitlement channel, Products, and Contacts.



Add an entitlement channel

The **Entitlement Channel** section specifies the support channel through which the customer can reach the organization and seek support.

Use this section to define the channels your customers are entitled to and track the customer support term for each channel. For example, you can add phone and email as the channels through which you'll offer support. If you want to restrict support through the phone channel to 80 hours and email to 20 hours, create individual entitlement channel records and add their total terms.

> ⓘ **Note**
>
> You must save the entitlement record before you can add entitlement channels to an entitlement.

1. In the **Entitlement Channel** section, select **...** and select **Add New Entitlement Channel** to add a new entitlement channel.
2. Specify the **Name** of the channel and **Total Terms** that you want to allot to the channel.

   The remaining term is auto-calculated and shows the total number of hours or cases remaining for the customer's entitlement.

Associate a product with the entitlement

If you want the entitlement to apply to a specific product for a customer, associate the product to the entitlement.

> ⓘ **Note**
>
> If you don't add a product, the customer will be entitled to support for all the products.

1. While in the entitlement record, in the **Products** section, select **...** and select **Add New Product** to add associate an existing product.
2. In the **Search** box, enter the first few letters of the name of the product that you want to associate with the entitlement.

   If a product isn't available, select **New** to create one.

Associate a customer contact with the entitlement

To let only certain contacts of a customer claim the entitlement for a specific product, associate the contacts with the entitlement.

> ⓘ Note
>
> If you don't add a contact, all the contacts for the specified primary customer will be entitled to support.

1. While in the entitlement record, in the **Contacts** section, select **...** and select **Add Existing Contact** to associate an existing contact.
2. In the **Search** box, enter the first few letters of the contact that you want to associate with the entitlement. This contact record must belong to the account or contact specified in the **Customer** field.

   If a contact isn't available, select **New** to create a contact record.

   All active entitlements for a customer appear in the **Active Entitlements** section of the customer record.

Activate or deactivate an entitlement

Before you can start applying an entitlement to a case, you must activate it.

1. While in the entitlement record, on the command bar, select **Activate**.
2. In the **Confirm Activation** dialog box, select **Activate**.

   > ⓘ Note
   >
   > If the start and end date of the entitlement fall in the future, the status of the entitlement is set to **Waiting**. On the start date, the status automatically changes to **Active**. If the end date is in the past, the entitlement is set to **Expired**.

   When an entitlement is active, you can't edit it. To deactivate an entitlement so you can edit it, on the command bar, select **Deactivate**.

Set an entitlement as default entitlement

You can activate the entitlement and then set it as the default entitlement for a customer. The entitlement terms from the associated entitlement are automatically reduced. However, if you don't want the entitlement terms to be reduced for a case, select **Do not decrement entitlement terms** on the command bar.

1. On the command bar, select **Set As Default**.
2. In the **Confirm set default** dialog box, select **OK**.

   Now the default entitlement will automatically be applied when a case is created or when a case is updated depending on what you selected for default entitlements in the system settings area. For more information, see the **Automatically apply entitlement** section in step 4 here, System Settings dialog box - Service tab.

Associate entitlements to cases

In a case record, in the **Entitlement** field, select the **Lookup** button,and select an entitlement. The inline lookup shows only the active entitlement for the customer of the case.

The Entitlements section in the case record lists all the active entitlements for the customer. More information:: See recent cases and entitlements

Cancel an entitlement

If the entitlement is no longer valid, you can cancel it. To cancel an active or waiting entitlement, open the entitlement, and on the command bar, select **Cancel**.

Renew an entitlement

To renew a canceled or expired entitlement, open the entitlement, and then on the command bar, select **Renew**. A new entitlement will be created, and its status is set to "Draft", while the canceled or expired entitlement will remain as is. The start date of the new entitlement will be set to the current date and the end date will be set to the current date plus the number of days between the end date and start date. The data in other fields is copied as is from the old entitlement.

See also

Set up entitlements quickly with templates

Use entitlement templates to set up entitlements

Article • 04/04/2022

Quickly create other entitlements prefilled with the basic information like the start and end date, service level agreement (SLA), allocation type, and total term by using an entitlement template in Dynamics 365 Customer Service. For example, create a template for a standard entitlement, and then apply this template for every standard customer in your organization.

> **Note**
>
> With the latest release of Dynamics 365 Customer Service app, entitlement templates in service management are available in the Customer Service Hub. We recommend that you create and manage entitlement templates using the new experience.

Create an entitlement template

You can create an entitlement template in the Customer Service admin center or Customer Service Hub app.

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   ### Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service terms** in **Operations**. The **Service Terms** page appears.

   b. In the **Entitlement Templates** section, select **Manage**.

The **All Entitlement Templates** view is displayed. You can switch between various system views using the drop-down list.

3. To create a new entitlement template, select **New** in the entitlement template search box.
4. Add or edit information in the text boxes.
    - **Entitlement Template Name**: Enter a name for the entitlement template.
    - **Start Date**: Select the date from when the entitlement will be valid.
    - **End Date**: Select the date until when the entitlement will be valid.
    - **Restrict based on entitlement terms**: To restrict creating case when the entitlement term is over, select Yes. Otherwise, select **No**.
    - **SLA**: Select an SLA record to associate the service levels or key performance indicators for the support you are providing with this entitlement.

      Under **Entitlement Terms**, specify the term details for the entitlement:

        - **Allocation Type**: Select whether the entitlement is for number of hours or number of cases.
        - **Decrease Remaining On**: Select whether to decrease the remaining term on case creation or resolution.
        - **Total Term**: Specify the total amount of support the customer is entitled to with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in Total term, then the customer is entitled to support up to 100 cases.
5. Select **Save**.

Add entitlement channels

Use the **Entitlement Channels** section to define the channels your customers are entitled to, and track the customer support term for each channel separately. For example, to use phone and email as support channels, and restrict them to 80 and 20 hours respectively, create an entitlement channel for each of them.

> **Note**

You must save the template record before you can add entitlement channels to the template.

1. In the **Entitlement Channel** section, select **...** and select **Add New Entitlement Template Channel**.
2. Specify the total terms that you want to allot to the particular channel.

   The remaining term is auto-calculated and shows the total number of hours or cases remaining for the customer's entitlement.

Associate a product with the entitlement template

If you want the entitlement template to be applicable to specific products for an individual customer, associate a product to the template.

1. In the **Search for records** box, type the first few letters of the name of the product that you want to associate with the template.
2. While in the template record, in the **Products** section, select **...** and select **Add Existing Product**.

> ⓘ **Note**
>
> In the Customer Service app, you can also select to open the template form in the **Form Editor** in case you want to add additional sections to the form.

See also

Create an entitlement to define the support terms for a customer

SLA limitations

Article • 10/12/2023

The following limitations apply to SLAs created in Unified Interface apps:

- The **Applicable When** and **Success Conditions** don't work as expected if they're configured for related entities.
  - The **Applicable When** conditions, if defined on the related entity, work only the first time the conditions are met, and the KPI instance is set to **In Progress**. After that, any update to the related entity won't cancel the existing KPI instance if the conditions of the same SLA item are false. The update doesn't create a new KPI instance if there's a change in the SLA item.
  - The **Success Conditions** defined on the related entity will never be true and the KPI instance once set to **In Progress** will never succeed, even if conditions are met. It continues to be in **In Progress**, **Nearing NonCompliance**, or **Noncompliant** status.

  To use related entities, you can add the related attribute values to the parent entity.

- You can't define multiple SLA items with the same **Applicable When** criteria and KPI.

- You can’t use nested related entities with the **Under** or **Not Under** operator as part of the conditions for SLAs. So, you need to change the **Applicable When**, **Success**, and **Pause** conditions to add one level of related entities only with the **Under** or **Not Under** operator.

- You can’t directly use the **Under** or **Not-Under** operator as conditions when configuring **Applicable When** or **Success** conditions for SLA items, so use related entities when using the **Under** or **Not Under** operator.

- We recommend that you don't use the **Modified On** field in the target entity while configuring **Applicable When** or **Success** conditions of SLA items or as the **Applicable From** field of SLA KPI instances. Changes to the **Modified On** field in the target entity might not initiate SLAs and might result in incorrect updates to SLA KPI instances.

- For expired SLAs, even if the success criteria is met, the SLA success date isn't available because the SLA KPI Instance doesn't have a field that can display the date of the action.

- Out of the box, you can’t retrieve data for SLA related case fields, such as **Active Duration** and **Elapsed Time**.
- You can't edit or remove an SLA that's already assigned to a case. However, you can customize how SLAs can be assigned to other cases and pause the SLA timer.
- You can’t manually update SLA time.
- If you're migrating more than 1000 SLAs, they might not pass the premigration checkup that processes all legacy SLAs. You can use the **&flags=FCB.SkipPreMigrationCheckUp=true** flag in the URL to skip the premigration checkup. To access the URL, go to **Miscellaneous** > **ARC and SLA migration** in the Customer Service admin center site map.

See also

Enable entities for service-level agreements
Troubleshoot issues in SLAs

Migrate SLAs

Article • 06/16/2022

Service-level agreements (SLAs) are deprecated in the web client. We recommend migrating standard and enhanced SLAs created in web client to Unified Interface. For more information on the deprecation, see SLAs in web client are deprecated. The migration tool for automatic record creation rules and service-level agreements (SLAs) helps migrate the rules in the web client to Unified Interface.

Before you begin the migration, learn how migrating to Unified Interface helps:

Standard or Enhanced SLA	**Unified Interface**
Condition Control in SLA item isn't accessible compliant	Condition Control in SLA item is accessible compliant
Uses Workflows for Actions	Uses **Workflows** and **Power Automate** flows for Actions
Pause configurations can be set only at **Table Level**	**Pause configurations** can be set at **Table**, **KPI**, and **SLA Item Level**
Calendar is on SLA level	Calendar is on SLA item level
Can't configure parallel KPIs	Can configure parallel KPIs
Can't configure SLA items with different **Applicable From**	Can configure SLA items with different **Applicable From**
Limited number of actions	Multiple actions (as Power Automate allows)
No support for Custom Time Calculation and Recalculation	Support for Custom Time Calculation and Recalculation of Warning Time and Failure Time of SLA

How migration works

To understand how you can migrate service-level agreements, see Migrate automatic record creation rules and service-level agreements.

For queries about migration, see Migration tool FAQ.

See also

Enable entities for service-level agreements

Troubleshoot issues in SLAs

Create standard SLAs

Article • 09/22/2023

> **Note**
>
> Standard SLAs created in the web client have been deprecated and replaced with Unified Interface SLAs. For more information on deprecation, see **SLAs in web client are deprecated**. We recommend migrating the standard SLAs created in the web client to Unified Interface. For more information on migrating SLAs, see **Migrate SLAs**.

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   When you activate an SLA, a corresponding workflow is also created. For every action you perform on the SLA, you must have permissions to perform the same action on workflows. The SLA is applied in the context of the permissions that the owner of the SLA has.

   Check your security role

   - Follow the steps in View your user profile.
   - Don’t have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Service Management**.

3. Go to **Service Level Agreements**.

4. To create a new SLA, select **New** on the command bar.

   > **Note**
   >
   > If your organization has the Customer Service admin center app and you try to create a new SLA from the web client, you'll see a deprecation message and an option to create the SLA in Unified Interface. There's no message displayed if you don't have the Customer Service admin center app in your organization.

5. Optionally, to edit an SLA, select the SLA in the list of records, and then select **Edit** on the command bar.

6. If you're creating a new SLA in Unified Interface, you'll see the **Create SLA** dialog box. Type a name for the SLA, and then in the **Entity** dropdown list, select **Case**.

   You do this because you can create a standard SLA only for the Case entity.

7. Enter your information as follows:

   - **Applicable From**: Select the case field that specifies the date and time from which the SLA items will be calculated. For example, if you select the **Created On** field, calculations will start from the time the case was created.

     > ⓘ **Note**
     >
     > You can have multiple SLA KPIs within one SLA. The start time for different SLA KPIs within an SLA is set at the SLA level and can't be different across SLA KPIs. The start time is determined by the **Applicable From** field value.

   - **Business Hours**: Select a customer service schedule record that defines your support organization's business hours. This is useful in the SLA time-tracking calculations. If a business hours record (customer service schedule) isn't selected, work hours are considered to be all day, every day.

   - **SLA Type**: Select **Standard**.

     You can select **Standard** only when the **Entity** field is set to **Case**.

   - **Allow Pause and Resume**: Select **Do Not Allow**. Because standard SLAs don't support pausing and resuming of SLAs, you can set this field to **Allow** only when you're creating an enhanced SLA.

8. Select **Save**.

9. To add SLA details, in the **SLA Details** section, select the **Add** button ➕.

   You add SLA details to define the KPIs or metrics for the SLA. You can define any KPI your organization needs. For example, a KPI might be that all cases for standard customers must be resolved within five days from when the case was created.

   Define success criteria and the failure and warning actions that need to be taken when an SLA metric isn't met for a customer case.

SLA KPIs are performance indicators that you'd like to track. For example, First Response or Resolve By. SLA items refer to SLA KPIs based on specific conditions. You can add multiple SLA items and arrange them in the order that works for you. For any given KPI, only the first SLA item that matches the conditions in the **Applicable When** section is applied.

> **Note**
>
> In Customer Service, SLA and SLA KPIs (SLA details) use the process (workflow) functionality. Although SLA KPIs use workflows, not all of the actions available in workflows are available for defining failure and warning actions. The available actions are currently limited to **Send Email**, **Create Record**, **Update Record**, **Assign Record**, and **Change Status**. More information: **Create and edit workflow processes**

10. Enter the following information in the **New SLA Item** form:

    - **Name**: Type a meaningful name.
    - **Related Case Field**: Select a field of DateTime type of the case record that this SLA item refers to. For example, if you're creating a KPI for sending the first response within a specified time, select the **First Response By** option from the dropdown list. If necessary, ask your system customizer to create new fields of type DateTime.

      When a case record is created or updated, this field is set to the date and time when the failure time will be reached for the respective SLA item. For example, select **First Response By** in **Related Case Field**, and set **Failure After** to two hours from the time the case was created. If the case was created at 09:00, the **First Response By** field in the case record will be set to 11:00, assuming the business hours are all day, every day.

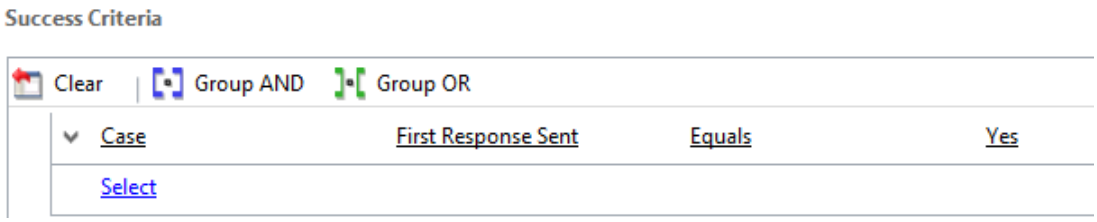
      > **Tip**
      >
      > By default, there are four options available in the dropdown list. If you want to track other KPIs, ask your system customizer to create case fields of type DateTime.

    - In the **Applicable When** section, define the conditions under which the KPI will be applied. The condition can be based on case or related entity fields.

      For example, the conditions might be as shown in the following image.

> **Note**
>
> If there are multiple clauses, and you don't use AND or OR grouping, by default the clauses will use the AND grouping.

- In the **Success Criteria** section, specify the conditions to define when the KPI will be considered as met. For example, the condition might be as shown in the following image.



> **Note**
>
> Before you specify the failure and warning actions for the SLA, save the SLA item record.
>
> If the conditions configured in the SLA fields conflict with each other, the SLA is canceled before it meets the success or failure criteria. For example, if the **Case Status** field is set as **Active** in the **Applicable When** section and is set as **not equal to Active** in the **Success Criteria** section, the SLA will be canceled when implemented.

- Under **SLA Item Failure**, in the **Failure After** dropdown list, select when the SLA items will be considered as failed. For example, if you select **1 hour**, the KPI will be considered as failed if the first response isn't completed within one hour of the time the case was created. One hour is calculated based on the value in the date-time field that you select in the **Applicable From** field of the SLA record.

- In the **Failure Actions** section, select **Add Step**, and then specify the actions to be taken if the success criteria aren't met and the case exceeds the specified failure time. For example, to mark a case for escalation when the KPI has failed, select **Add Step** > **Update Record** > **Case** > **Set Properties**. In the

case record, change the value of the **Is Escalated** field, and then close the case form.

- Under **SLA Item Warning**, in the **Warn After** dropdown list, select the time when a warning is to be raised that the KPI is nearing violation.
- In the **Warning Actions** section, select **Add Step**, and then specify the actions to be taken when the KPI reaches the time when a warning is to be raised. For example, to warn the case owner that the KPI is nearing violation, select **Add Step** > **Send Email** > **Create New Message** > **Set Properties**. In the email record, type the email details, and then close the email form.

> ⓘ **Note**
>
> The time for failure and warning is calculated after considering the business hours selected in the SLA record. If a business hours record (customer service schedule) isn't selected, the work hours are considered to be all day, every day.

> ⓘ **Important**
>
> Make sure that you don't have too many SLA items in an SLA because it might negatively affect the create and update operations on the record on which the SLA is applied or reevaluated. For performance reasons, we recommend that you don't have more than 15 SLA items in an SLA record.

11. Select **Save and Close**.

> ⓘ **Important**
>
> - Failure and warning actions run asynchronously and might not be triggered exactly at the failure or warning time.
> - If failure or warning times are set to less than one hour, the processing of failure or warning actions might be delayed.
> - Make sure you author SLAs in a way that best suits your company's needs. For example, in the SLA **Applicable When** conditions, we recommend that you don't use case fields that are updated too

frequently because any change to the field value might lead to the SLA item being canceled.

See also

Enable entities for service-level agreements
Troubleshoot issues in SLAs

Create enhanced SLAs

Article • 09/22/2023

> **Note**
>
> Enhanced SLAs created in the web client have been deprecated and replaced with Unified Interface SLAs. For more information on deprecation, see **SLAs in web client are deprecated**. We recommend migrating the enhanced SLAs created in the web client to Unified Interface. For more information on migrating SLAs, see **Migrate SLAs**.

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

   When you activate an SLA, a corresponding workflow is also created. For every action you perform on the SLA, you must have permissions to perform the same action on workflows. The SLA is applied in the context of the permissions that the owner of the SLA has.

   Check your security role

   - Follow the steps in View your user profile.
   - Don’t have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Service Management**.

3. Go to **Service Level Agreements**.

4. To create a new SLA, select **New**.

   > **Note**
   >
   > If your organization has the Customer Service admin center app and you try to create a new SLA from the web client, you'll see a deprecation message and an option to create the SLA in Unified Interface. There's no message displayed if you don't have the Customer Service admin center app in your organization.

5. Optionally, to edit an SLA, select the SLA from the list of records, and then select **Edit** on the command bar.

6. If you're creating a new SLA in Unified Interface, you'll see the **Create SLA** dialog box. Type a name for the SLA, and then select the entity for which you want to create the SLA.

7. Enter your information as follows:

    - **Applicable From**: Select the field that specifies the date and time from which the SLA items will be calculated. For example, if you select the **Created On** field, calculations will start from the time the record was created.

        > ⓘ **Note**
        >
        > You can have multiple SLA KPIs within one SLA. The start time for different SLA KPIs within an SLA is set at the SLA level and can't be different across SLA KPIs. The start time is determined by the **Applicable From** field value.

    - **Business Hours**: Select a customer service schedule record that defines your support organization's business hours. This is useful for SLA time-tracking calculations. If a business hours record (customer service schedule) isn't selected, work hours are considered to be all day, every day.

    - **SLA Type**: Select **Enhanced**.

      If you're creating an SLA for an entity other than the Case entity, this field is automatically set to **Enhanced** and can't be changed.

    - **Allow Pause and Resume**: Select **Allow** if you want the SLA to pause during the time the record is on hold. For each entity that's enabled for SLA, you can select each status that will be considered "on hold" by using the **Service** tab of the **System Settings** dialog box. More information: System Settings dialog box - Service tab

8. Select **Save**.

9. In the **SLA Details** section, select **Add** (➕).

10. Enter the following information in the SLA Item form:

    - **Name**: Type a meaningful name.

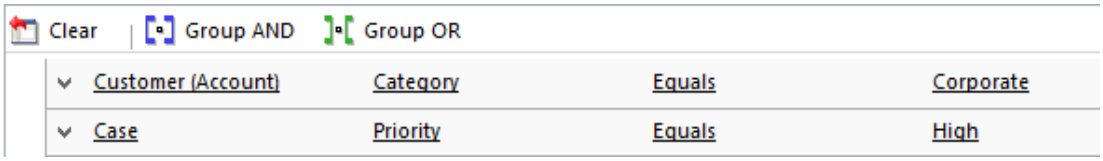
    - **SLA KPI**: Select the KPI the SLA item is about. For example, if you're creating a KPI for sending the first response within a specified time, select the **First Response By KPI** option from the dropdown list.

For example, select **First Response By KPI** in the **SLA KPI** field, and set **Failure After** to two hours from the time the record was created. If the record was created at 09:00, the **Failure Time** field of the SLA KPI Instance record is set to 11:00, assuming business hours are all day, every day.

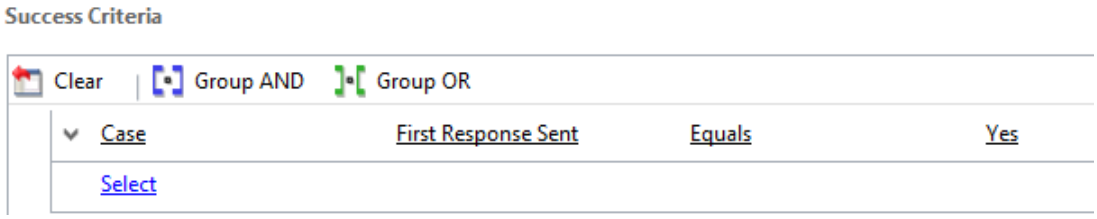
> **Tip**
>
> If you're creating an SLA for a Case entity, by default you have two options to choose from in the dropdown list. If you want to track other KPIs for a case or if you're creating the SLA for entities other than the Case entity, ask your system customizer to create new fields (of type Lookup) that refer to the SLA KPI Instance entity.

- In the **Applicable When** section, define the conditions under which the KPI will be applied. Conditions can be based on primary entity or related entity fields.

  For example, the conditions might be as shown in the following image.



- In the **Success Criteria** section, specify the conditions to define when the KPI will be considered as met. For example, the condition might be as shown in the following image.



> **Note**
>
> - Before you specify the failure and warning actions for an SLA, save the SLA item record.
> - If the conditions configured in the SLA fields conflict with each other, the SLA is canceled before it meets the success or failure criteria. For example, if the **Case Status** field is set as **Active** in the **Applicable**

When section and is set as not equal to **Active** in the **Success Criteria** section, the SLA will be canceled when implemented.

- In the **Success Action** section, select **Add Step**, and then specify the actions that you want the application to take when the success criteria is met before the violation time. For example, select **Add Step** > **Change Status**, and then in the first dropdown list, select **Case**, and in the next dropdown list, select **Information Provided**.
- Under **SLA Item Failure**, in the **Failure After** dropdown list, select when the SLA items will be considered as failed. For example, if you select **1 hour**, the KPI will be considered as failed if the first response isn't completed within one hour of the time the case was created. One hour is calculated based on the value in the DateTime field that you select in the **Applicable From** field of the SLA record.
- In the **Failure Actions** section, select **Add Step**, and then specify the actions to be taken if the success criteria aren't met and the record exceeds the specified failure time. For example, to mark a case for escalation when the KPI has failed, select **Add Step** > **Update Record** > **Case** > **Set Properties**. Now in the case record, change the value of the **Is Escalated** field, and then close the case form.
- Under **SLA Item Warning**, in the **Warn After** dropdown list, select the time when a warning is to be raised that the KPI is nearing violation.
- In the **Warning Actions** section, select **Add Step**, and then specify the actions to be taken when the KPI reaches the warning time. For example, to warn the case owner that the KPI is nearing violation, select **Add Step** > **Send Email** > **Create New Message** > **Set Properties**. In the email record, specify the email details, and then close the email form.

> ⓘ **Note**
>
> The time for failure and warning is calculated after considering the business hours selected in the SLA record. If a business hours record (customer service schedule) isn't selected, work hours are considered to be all day, every day.

Samples for creating enhanced SLA KPIs

The following sample SLA KPIs for the Lead entity can help you get familiar with creating SLAs for other entities.

Sample 1: Contact the customer

This sample SLA KPI tracks whether the salesperson has contacted the customer within a specific timeline.

Applicable when	Success condition	Failure time	Failure action	Warning time	Warning action
Rating = Hot	Status = Contacted	1 day	Send an escalation email to the sales manager	16 hours	Send a warning email to the salesperson
Rating = Warm	Status = Contacted	2 days	Send an escalation email to the sales manager	1.5 days	Send a warning email to the salesperson
Default	Status = Contacted	7 days	Send an escalation email to the sales manager	5 days	Send a warning email to the salesperson

Sample 2: Take action on a lead

This sample SLA KPI tracks whether the salesperson has taken necessary action on the lead within a specific timeline.

Applicable when	Success condition	Failure time	Failure action	Warning time	Warning action
Rating = Hot	Status = Qualified or Disqualified	2 days	Send an escalation email to the sales manager	1.5 hours	Send a warning email to the salesperson
Rating = Warm	Status = Qualified or Disqualified	5 days	Send an escalation email to the sales manager	4 days	Send a warning email to the salesperson
Default	Status = Qualified or Disqualified	15 days	Send an escalation email to the sales manager	12 days	Send a warning email to the salesperson

Important

- We recommend that you don't create or update SLAs by using Dynamics 365 for Outlook. Use the Customer Service app for this purpose.
- Make sure you don't have too many SLA items in an SLA because that might negatively affect the create and update operations on the record on which the SLA is applied or reevaluated. We recommend that you have no more than 15 SLA items in an SLA for performance reasons.
- The SLA business logic relies on **SLA KPI Instance** record values, so to avoid any conflict, we recommend that you don't create plug-ins or processes to directly update the **SLA KPI Instance** record values.

See also

Enable entities for service-level agreements
Troubleshoot issues in SLAs

Add a timer in forms to track time against enhanced SLAs

Article • 06/16/2022

> **Note**
>
> - Enhanced SLAs have been deprecated and replaced with Unified Interface SLAs. More information: **SLAs in web client are deprecated**.
> - For more information about adding a timer control to Unified Interface SLA-enabled entities, see **Add a timer control for SLA-enabled entities**.

A timer helps users gauge the amount of time they have to complete a key performance indicator (KPI) that is typically associated with a service level agreement (SLA). If your organization uses enhanced SLAs, you must use quick view forms to add a timer to track time against such SLAs.

The timer control initially displays a count-down timer to show the time remaining to complete the KPI.

> **Note**
>
> - A timer control can be used independent of SLAs, too.
> - The timer control is designed to visually show the current state or show the remaining or elapsed time relative to the date and time specified in the **Failure Time** field of the SLA KPI instance. It doesn't calculate or keep track of the time for which the Pause condition is true.

The timer control can show any of the following, depending on the actions of the user and what you as a system administrator or customizer specify when you set up the timer control:

- If the user completes the task within the remaining time, the control shows the word **Succeeded**.
- If the user doesn't complete the task within the remaining time, the control shows the word **Expired**.

- As the timer counts down, the color changes to yellow as the time remaining nears non-compliance. If the time remaining expires, the timer shows the word **Expired**. Then the timer color changes to red and the timer starts counting up to show the elapsed time since the task should have been completed.
- If a condition causes the SLA KPI to pause, the control shows the word **Paused**.
- If a condition causes the SLA KPI to be canceled, the control shows the word **Canceled**. This behavior is optional.
- If either of the required fields in the **Timer Control** dialog box does not have a value in the record, the control shows the words **Not Set**.

To add a timer to track time against enhanced SLAs:

1. Ensure the entity is enabled for SLA.
2. Create SLA KPI fields for the entity for which you want to create the SLA.
3. Create quick view forms for each SLA KPI instance field that you've created.
4. Create an SLA.
5. Add the quick view forms that you created to the primary entity form

Enable an entity for SLA

To add a timer for an enhanced SLA to an entity form, that entity must be enabled for SLA. To learn more, see Enable entities for service level agreements.

Create SLA KPI fields

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   ### Check your security role

   - Follow the steps in View your user profile.
   - Don’t have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Customizations**.
3. Choose **Customize the System**.

4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Fields**.
6. On the Actions toolbar, click **New**, and then enter a **Display Name** to generate the **Name**.
7. In the **Data Type** drop-down list, select **Lookup**.
8. In the **Target Record Type** drop-down list, select a SLA KPI Instance.

   If you create a lookup field in an entity form, the relationship is automatically generated. A lookup field is created as a relationship field.
9. Click **Save and Close** to close the form editor.
10. Publish your customization.

    - To publish customizations for just one entity, under **Components**, click **Entities**. Then, on the Actions toolbar, click **Publish**.
    - To publish all customizations you have made to any entities or components, on the Actions toolbar, click **Publish All Customizations** .

Create quick view forms for the SLA KPI Instance entity

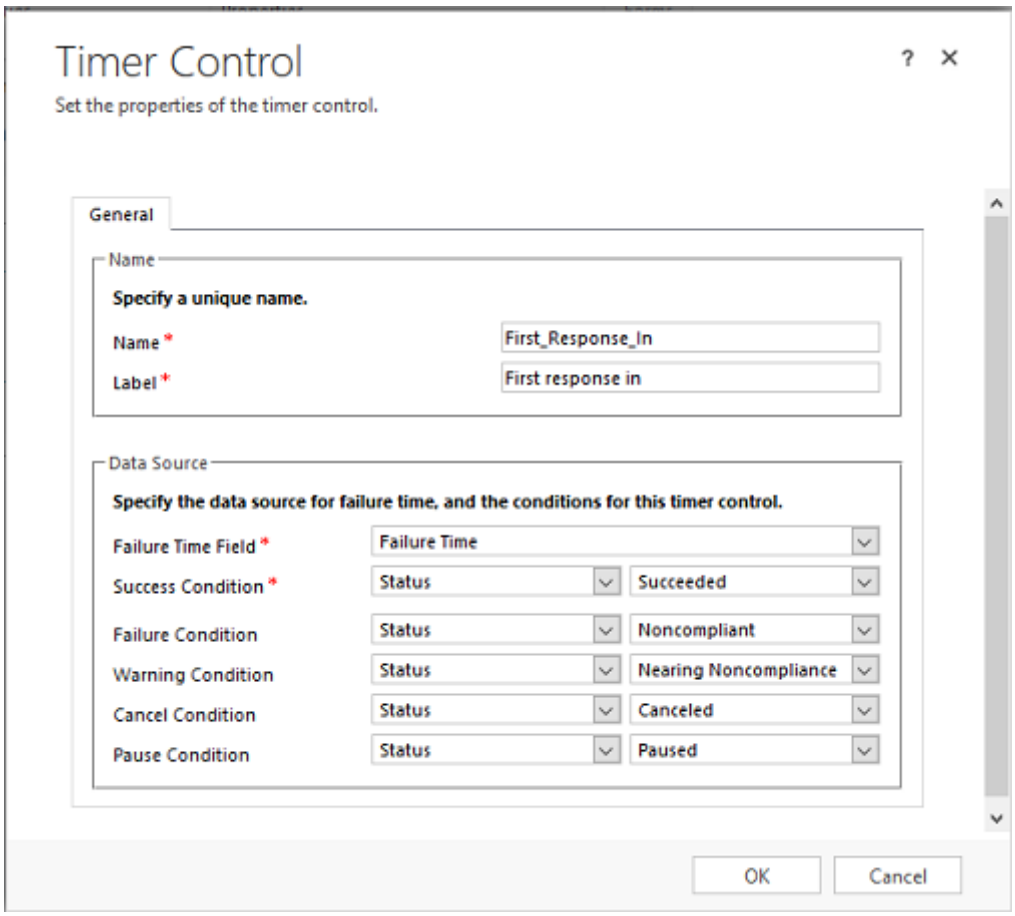
Quick view forms help you show data of a related entity in the primary entity form. For enhanced SLAs, all the SLA-related states and times are stored in the SLA KPI instance entity. To show this data in the primary entity like a lead or an opportunity form, you must create a quick view form for each SLA KPI field that you've created for the primary entity. Add a timer to the quick view form so it shows the count down for the SLA.

Create a quick view form

1. Go to **Settings** > **Customizations**.
2. Choose **Customizations**, then choose **Customize the System**.
3. In the solutions explorer, expand the SLA KPI Instance entity, and then select **Forms**.
4. Select **New** > **Quick View Form** from the tool bar.

5. In the **Form** group, click **Form Properties**, and then specify a form name.
6. Double-click the section, type a meaningful name for the section, and then click **OK**.
7. Select the section, and on the **Insert** tab, click **Timer**.
8. Specify a name and label for the timer, and the data source for the failure time.

   Following is an example of the properties you'd set for a timer for a Case entity.



> ⓘ **Note**
>
> Typically, for enhanced SLAs, the timer control is set up using the SLA KPI Instance status field values only.

9. When you are finished, click **OK**.
10. Publish the customizations .

Create an SLA

Create an SLA for the entity you want to track. For example, you may want to create track the time taken by sales person to take action on a lead, like qualifying or disqualifying a lead. For this, create an SLA for the lead entity. For more information on creating an SLA, see Define service level agreements

Add the quick view form to the primary entity form to show the timer

You can add the quick view forms you created earlier as quick view controls in the primary entity forms.

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

   ### Check your security role

   - Follow the steps in View your user profile.

2. Go to **Settings** > **Customizations**.

3. Click **Customize the System**. In the solution explorer, in the left nav pane, expand **Entities**, expand the entity you want to add the quick view form to, and then click **Forms**.

4. To add the timer to use in the Dynamics 365 Customer Service app, open the form of type **Main**.

   -OR-

   To add the timer to the interactive experience form so users can use it in the interactive service hub, open the form of type **Main – Interactive experience**

5. Add a section to insert the quick view control. On the **Insert** tab, in the **Section** group, click **Section**, and then click **One Column**. Double-click the section to specify the section properties. More information: Section properties.

   > **Note**
   >
   > You can't add an SLA timer to the reference panel section of the Main - Interactive experience form.

6. Select the section that you just added, and on the **Insert** tab, in the **Control** group, click **Quick View Form** .
7. Specify a name and label for the quick view control. In the **Lookup Field** drop-down list, select the lookup field that you created to point to the SLA KPI Instance entity.
8. The Related Entity drop-down list will be automatically set to "SLA KPI Instance".
9. In the **Quick View Form** drop-down list, select the quick view form you created in the SLA KPI Instance entity.
10. Click **OK** to close the **Quick View Control Properties** dialog box.

    You must save and publish the Main form before the quick view control changes will be visible.

See also

Add a timer control to the Case form to track time against an SLA

Understand SLAs

Article • 10/14/2023

Understand the various service-level agreements (SLA) KPIs and SLA KPI Instance record details.

Understand SLA details with Timer control

You can see the SLA details on the SLA-enabled entity record.

Timer control for SLA-enabled entities

If your administrator has enabled the configurations to display the statuses of the configured SLA KPIs by using the SLA Timer control subgrid, you see the following details:

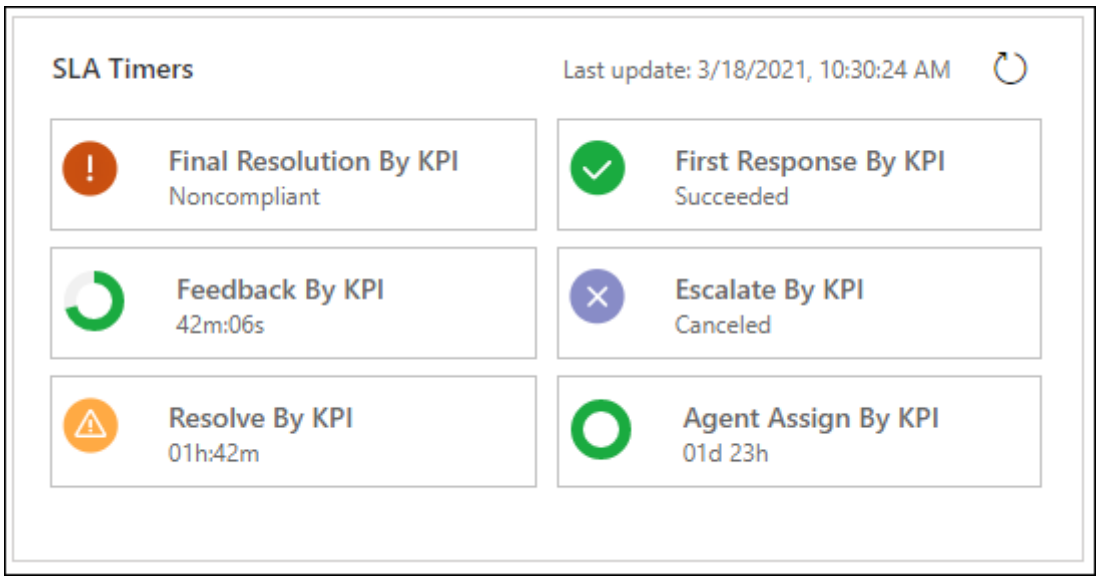
- The different status changes that the KPIs go through.
- When a KPI nears compliance or noncompliance, the time ticker changes to show the time in hours, minutes, and seconds, as applicable.
- The icons are updated for the different stages that the KPIs go through.
- The KPIs are refreshed at the interval that you specify at the time of configuration.

The statuses and their corresponding symbols are as follows.

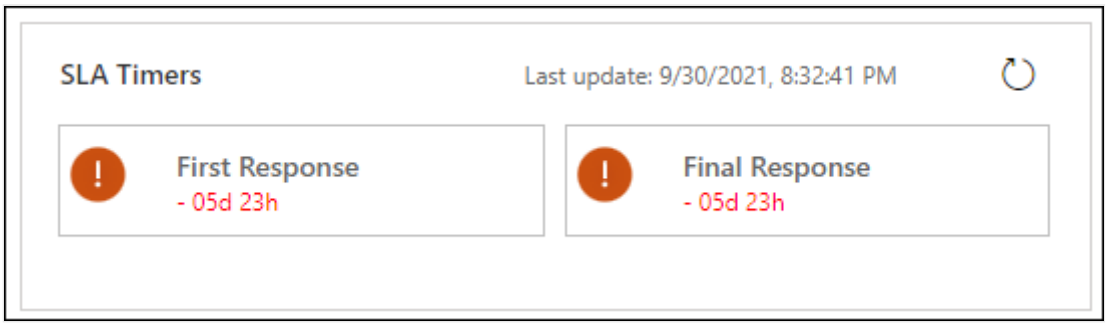
Symbol	Status
	In progress
	Noncompliant
	Nearing noncompliance
	Paused
	Succeeded

Symbol	Status
	Canceled

A sample runtime view of the SLA Timer is as follows. The SLA KPIs displayed aren't in any particular order.



For SLAs that are in the expired status, your administrator can configure the SLA Timer to display the elapsed time. The timer displays the countdown using a negative value in the red color. Only those SLA Timers that have been configured to show the negative time displays the negative countdown time. More information: Enable elapsed time for SLA Timers in expired status



Know the status of an SLA KPI Instance record

Based on the business hours, the timer displays the time remaining to meet the SLA or the elapsed time since the SLA failed. For example, if failure time is set to 5 days and business hours are 9:00 AM to 5:00 PM, then you see 5 days on the timer. If failure time is set to 10 hours, then you see 1 day and 2 hours on the timer. Your system administrator or customizer can add a timer to the SLA-enabled entity form.

When an SLA is applied to an entity, a related SLA KPI Instance record is created for each SLA KPI that is tracked for that entity. The on-hold time is the time for which the case was set to a status that you defined as On-Hold in the System settings dialog box. More information: System Settings Service tab

For example, when you put a case on hold, the status of the SLA KPI Instance is set to Paused. You can see the time for which a case was on hold and the last time the case was put on hold. These details aren't available on the case form by default but your system customizer can add these fields on the case form for you.

When you resume a case, the status of the SLA KPI Instance record is updated. The following details are updated in the record if the SLA isn't violated:

- Failure time
- Warning time
- Total time the case is on hold

If you put the case on hold after the warning time, then the warning time isn't updated when the case is resumed. Similarly, the status of the SLA KPI Instance is updated when the first response time on a case is:

- Nearing expiry
- Has expired
- Has succeeded

> **Note**
>
> - The SLA Timer continues to run after it's triggered or resumed. It includes the holiday hours, non-business hours, and pause time (only business hours) while projecting the SLA warning or failure time.
> - The timer control auto-refreshes for **Pause** and **Resume** states to show the updated SLA. For all other states, you must refresh the page to view the refreshed SLA. Select **...** and select **Refresh** on the command bar to refresh the SLA Timer control.

You can now also apply SLAs on demand. More information: Apply SLAs

To learn more about adding a timer control to an SLA-enabled entity, go to Add a timer control for SLA-enabled entities.

Know active duration and elapsed time for SLA KPI Instances

Track the time taken by SLA KPI Instances to reach their terminal status during business hours to evaluate whether the SLAs are realistic and take decisions about resourcing and efficiency.

The **Active Duration (min)** and **Elapsed Time (min)** fields for an SLA KPI Instance help you derive the exact number of business hours that were spent. The **Active Duration (min)** field shows data only when the KPI is in a **Paused** or terminal state. **Elapsed Time (min)** shows data only when the KPI is in an **In progress** or terminal state. The final value appears in the last KPI instance after the terminal state. The active duration and elapsed time data is shown in minutes.

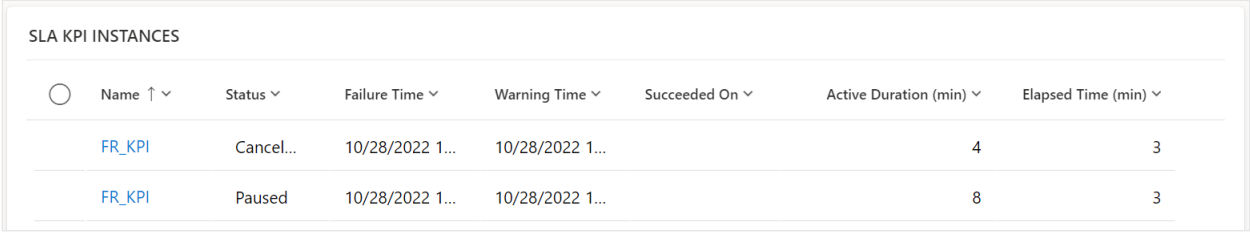
Active duration calculation is asynchronous by default.

You might need to refresh the views that have an **Active Duration (min)** field after any create or update operation. You may also need to review any customizations associated with the **Active Duration** attribute of the SLA KPI instance.

You can view the active duration and elapsed time on the **SLA** tab of the custom entity as well.

- **Active Duration (min)**: Displays the time for which the SLA KPI Instance was active.
- **Elapsed Time (min)**: Displays the time for which the SLA KPI Instance timer was paused.

Both **Active Duration (min)** and **Elapsed Time (min)** are calculated based on the current value of the business hours and calendars, similar to warning and failure time calculation. So, changing the calendar working hours might affect the calculation.



SLA KPI INSTANCES

Name	Status	Failure Time	Warning Time	Succeeded On	Active Duration (min)	Elapsed Time (min)
FR_KPI	Cancel...	10/28/2022 1...	10/28/2022 1...		4	3
FR_KPI	Paused	10/28/2022 1...	10/28/2022 1...		8	3

> **Note**
>
> The **Active Duration (min)** and **Elapsed Time (min)** data aren't applicable for legacy SLAs.

Know the SLA KPI instance entity name

For SLA KPI instances, you see the **Regarding** column as blank on Unified Interface, and on the web client you see it as **(No name)**. This happens for all existing and custom entities other than the case entity.

Your administrator must configure the SLA KPI instance name through **Advanced Find**.

See also

Use the Main form and its components

Configure SLA KPI instance entity name through Advanced Find

Configure email

Article • 05/23/2023

Email is typically used as a communication channel between customers and agents throughout the lifecycle of support delivery. Regardless of the channel where a customer begins a conversation, agents often use email to send their customers confirmations, case IDs, attachments, or other communications of record throughout the support lifecycle.

In customer engagement apps, system administrators have the ability to configure email templates and enable quick access to email to help users create emails directly from the timeline so they can deliver a more personalized service.

The following email configuration options are available:

- Configure the email form order: Allow users to access email capabilities and create an option on the command bar.
- Enable the enhanced email experience: Allow users to use broader email functionality, such as expanding the email editor pop-up window, applying predefined templates, and inserting attachments to email.
- Configure email attachments size limitations: Allows you to manage file size limits for email attachments.
- Configure the attachment tiles thumbnail layout: Allows you to configure the visual layout of attachments and the number of attachments to show per page.
- Change the number of attachments to show per page: Configure how many attachments you want to show.
- Manage blocked attachment file types: Allows you to configure the types of file types you want to block users from being able to upload as email attachments.

Configure the email form order

Email must be enabled for users so they can view and access it. When email is enabled, it shows as an option on the command bar.

To enable email:

1. In Power Apps, go to **Settings** > **Advanced Settings**.
2. From the top menu, select **Settings** > **Customizations**.
3. Select **Customize the System**.

4. Expand **Entities**, select and expand **Email**, and then select **Forms**.
5. On the command bar, select **Form Order**, and then select **Main Form Set** from the drop-down list.
6. The **Form Order** window appears, which displays the enabled email forms that are available. If **Enhanced email** doesn't display at the top of the list, use the arrows to move it up so it displays first on the list, and then select **OK**.

   > ⓘ **Note**
   >
   > Both the Navigate-to and Contextual (pop-up) email experience use the same **Form Order**.

7. When you've completed your updates, select **Publish All Customizations** in the top-left corner in order for changes to be displayed.

Enable the enhanced email experience

Enhanced email is the default setting, but you must enable email for users to access and use the features.

Sign in to https://`<YourOrgURL>`.dynamics.com/apps and open a customer engagement app. In the app:

1. Go to **Settings** > **Advanced Settings**.
2. Select **Settings** > **Administration**.
3. Select **System Settings**. The **System Settings** window is displayed.
4. Select the **Email** tab, scroll down to the **Enhanced email for Timeline** section, and then select the check box.
5. Select **OK** to save your global organizational setting and close the window.

Configure email attachment size limitations

You can manage file size limits for email file attachments by doing the following:

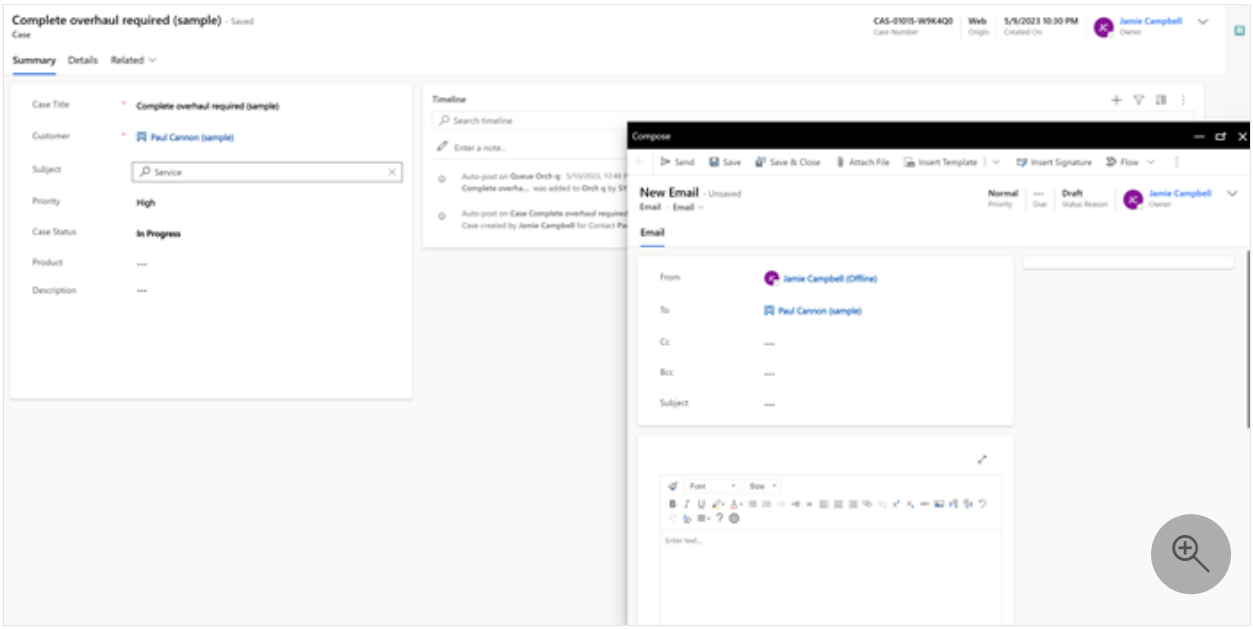
1. In Power Apps, select **System Settings**.
2. In the **System Settings** display window that appears, go to the **Email** tab.

3. Scroll down to the **Set file size limit for attachments** section, set the file size you want to use for attachment, and then select **OK**.

> ⓘ **Note**
>
> The default file size limit for attachments is 5 MB. The size limit for attachments can be increased to a maximum of 132 MB per file.

Configure email pop-up window

When an agent selects **New Email** from the Timeline, you can to choose to display the email editor either as a pop-up window or in a new tab. If you enable the email pop-up editor setting, agents see the following experience:



Perform the following steps to display the email editor as a pop-up window:

1. Select **Settings** > **Advanced Settings**.
2. Select **System** > **Administration**.
3. Select **System Settings**.
4. In the **System Settings** display window that appears, go to the **Email** tab.
5. Select **Multitask, compose, and save drafts using email pop-up windows when creating email from timeline** in the **Enhanced email for Timeline** section, and then select **Ok**.

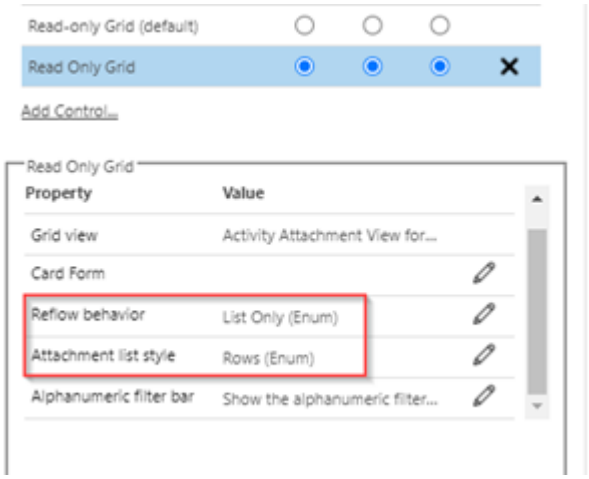
Configure attachment tiles thumbnail layout

You can configure the attachment tiles thumbnail layout in email by selecting the Email entity form for enhanced email from the Advanced settings menu.

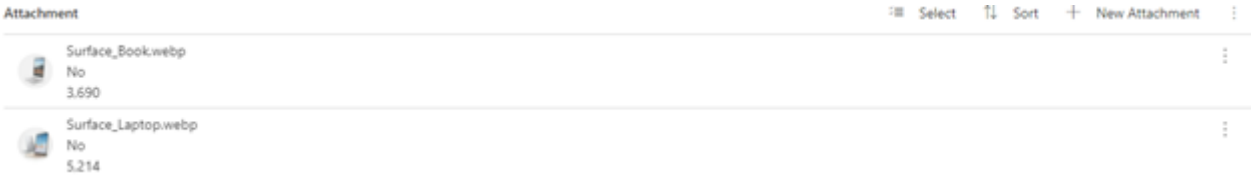
1. In Power Apps, go to **Advanced settings**.
2. Select **Customizations** > **Customize the System**.
3. Select **Entities** > **Email** > **Forms** > **Enhanced Email**.
4. Double-click the **Attachment** area of the form to show the **Properties** dialog.
5. If the **Read Only Grid** control isn't already present, add it by selecting the **Controls** tab and then selecting **Add Control**.
6. After you've added the **Read Only Grid**, you can select it to set the properties you want. Choose from the following:

- **Reflow Behavior**: Determines whether the layout of a grid changes to a list layout when not enough space is available.
  - **Reflow**: Shown in list mode or grid mode, depending on the available size.
  - **List Only**: Shown in list mode only.
  - **Grid Only**: Shown in grid mode only.
- **Attachment List Style**: The way individual attachments are displayed in list mode (for the Attachment entity only)
  - **Grid**: Shown in block with multiple attachments per row.
  - **Rows**: Default experience with a single attachments per row.

For example, we'll set **Reflow behavior** to **List Only** and **Attachment list style** to **Rows**.



These settings display attachments as follows:



Changing to **List** and **Grid** shows the following attachment layout:

Change the number of attachments to show per page

You can configure the maximum number of attachments to show per page. Adjust the settings on the **Formatting** tab of the **List or Chart properties** dialog. For example, if you set the **Number of Rows** property to 4, and then have more than four attachments per email, the rest of the attachments will paginate and you can then use the arrow buttons to view them.

Manage blocked attachment file types

You can configure the attachment file types you want to block to prevent users from uploading certain files.

1. In Power Apps, go to **Advanced settings**.
2. Select **System** > **Administration** > **System Settings**.
3. On the **General** tab, scroll down to **Set blocked file extensions for attachments**.
4. Type the file extension(s) you want to block. Users who try to upload a blocked file type will see an error message that tells them the attachment is blocked.

See Also

Use email
Create an email template
Insert an email template
Convert an email to a template
Use a signature in email
Email FAQ

Customize the email experience

Article • 04/05/2023

The email configuration experience enables users to be more effective and efficient when using email to communicate with customers. This article discusses how to configure the email editor, email template builder, and email signature builder, which accepts the full configuration capability of the Rich Text Editor control.

> **Note**
>
> If you're using the Activity Editor control, we recommend that you use the rich text editor control instead because the Activity Editor control has been deprecated. For details, see **Use the rich text editor control in Power Apps**.

Each instance of the email editor or builder can be configured independently, enabling you to:

- Choose the fonts you want.
- Set a default font.
- Add your own font.
- Adjust the toolbar location and buttons.
- Automatically increase the editor height to fit the content.
- Access HTML.
- Configure the rich text editor control in email experiences (including email editor, email template builder, and signature builder).

Configure the email form by using a web resource file

You can configure email by using a web resource file that can be modified as needed and then linked to the email form.

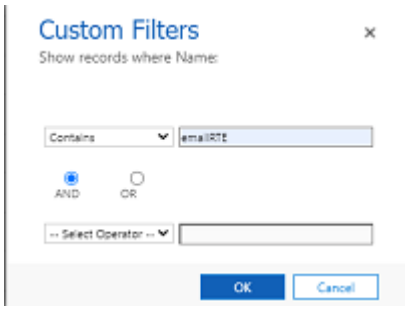
Enabling the user configured settings to an email form consists of the following steps:

1. Configure the web resource file
2. Enable the RTE control in the email form

Configure the web resource file

1. Access the web resource file by navigating to **Advanced settings** > **Customize the system** > **Web Resources**.

2. Use the filter to search for the web resource files, as shown below:



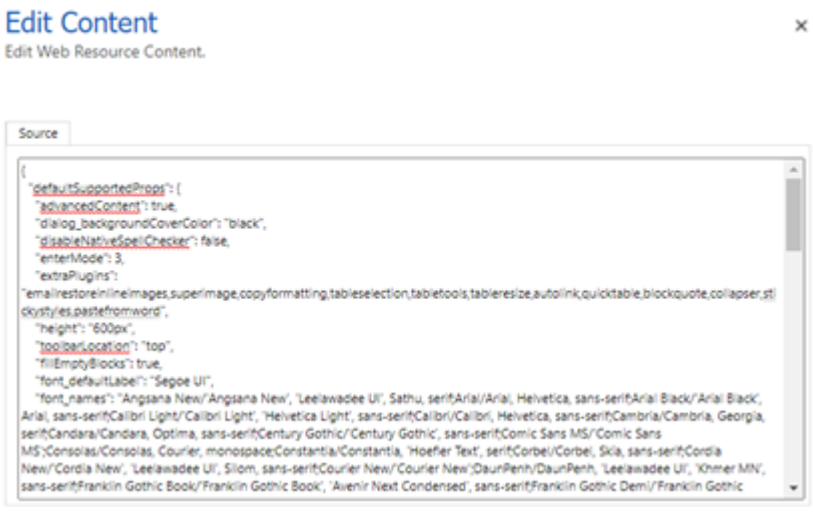
   There may be more than one file named msdyn_EmailRTEconfig_reference.js. One is the default, out-of-the-box configuration file that isn't modifiable. The other can be opened and used as a reference to create a new web resource file that will host your configuration changes.

3. Select the editable file. A new window is displayed.

4. In the **Content** section, select **Text Editor**.

   An **Edit Content** window is displayed.

5. Copy the text in the **Source** field, and then close the window.



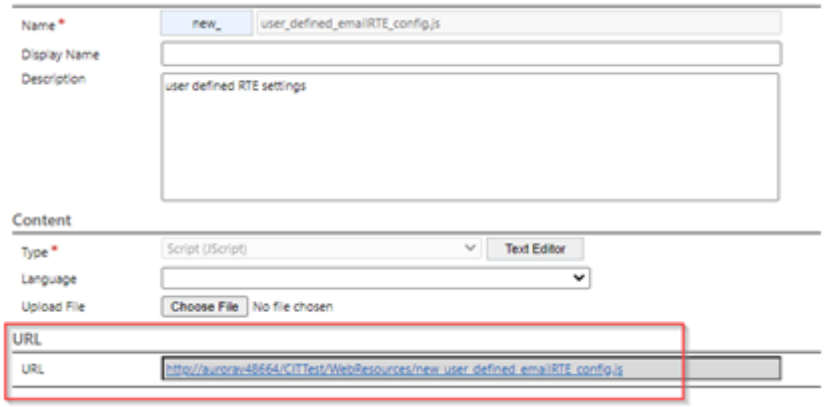
6. Create a new web resource and paste the code you copied from the existing file into it.

7. Make any changes you want, and then select **Save and publish**.

> ⓘ **Note**

- A code editor such as Visual Studio Code can provide a better editing experience.
- There are a variety of properties that can be modified and will apply to the email form when you configure it. For more information, see **Rich Text Editor Properties**.
- Ensure that the **disableDefaultImageProcessing** property is set to **True** for inline images added to the editor to load properly in the recipient's email.

8. Save the URL to the new web resource because you'll need it to map the new web resource file to the **Enhanced Email** form.



9. Navigate to **Customization** > **Customize the system** > **Entity** > **Email** > **Forms**.

10. Open the **Enhanced Email** form, double-click **Description**, and then navigate to the **Control** tab.

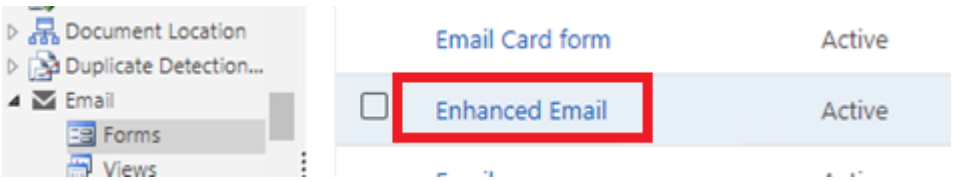
11. Add the RTE control, select **Custom Configuration URL**, and then in the URL field, enter the URL from the new web resource file you created.

12. Select **Save** and then **Publish All Customizations**.

Enable the RTE control in the email form

1. Navigate to the email form properties: Select **Advanced settings** > **Customize the system** > **Entities** > **Email** > **Forms**.

   In this example, we'll add the web resource file to the **Enhanced Email** form.



2. Select the form, and then double-click the **Description** field to enter the field properties.
3. If the RTE control isn't already added, select the **Controls** tab to add it.
4. Select the **Custom configuration control** and replace **singleLine.URL** with the web resource URL for the web resource file you created in the steps above.

5. Select **Save** > **Publish**.

   The settings will now apply to the form when you create an email.

> ⓘ Note
>
> If you're using a workflow to populate email content in RTE fields that aren't in Timeline and you experience issues with inline images not rendering properly, you must use the msdyn_EmailRTEconfig_reference.js plugin.

Add the language filter in the email template selection view

Perform the following steps to enable the language filter for the enhanced email template selection window:

1. Navigate to **Settings** > **Advanced Settings**.
2. Select **Customizations** > **Customize the System**.
3. In **Solution: Default Solution**, expand **Entities**.
4. Expand **Email Template** and then select **Forms**.
5. On the **Active Forms**, select **Template gallery filter form**.
6. Drag and drop **Language** from the available fields to the form.

   > ⓘ Note
   >
   > **Language** is added to the form by default.

7. Select **Language** and then select **Change Properties**.

8. In **Label**, select **Display label on the form**.
9. In **Visible**, select **Visible by default**.
10. Save and publish the changes.

Customize the enhanced email template selection view

The enhanced email template selection window displays the **Select Record dialog** and allows agents to toggle between email template views. Perform the following steps to enable these features:

1. Navigate to **Advanced Settings** > **Email Configuration**.
2. Select **Email Configuration** > **Email Configuration Settings**.
3. In **Enhanced E-mail Template selection experience**, set **Enable Email Template views** and **Skip Select Record dialog** to **Yes**.

Configure the default email template selection view

Perform the following steps to configure the default view for the enhanced email template selection window:

1. Navigate to **Settings** > **Advanced Settings**.
2. Select **Settings** > **Email Configuration** > **Email Configuration Settings**.
3. Set the **Default view** option for **Enhanced E-mail Template selection experience**.

See also

Configure email
Create an email template
Insert an email template
Convert an email to a template
Use a signature in email
Email FAQ

Configure the enhanced insert email template selection dialog

Article • 04/10/2023

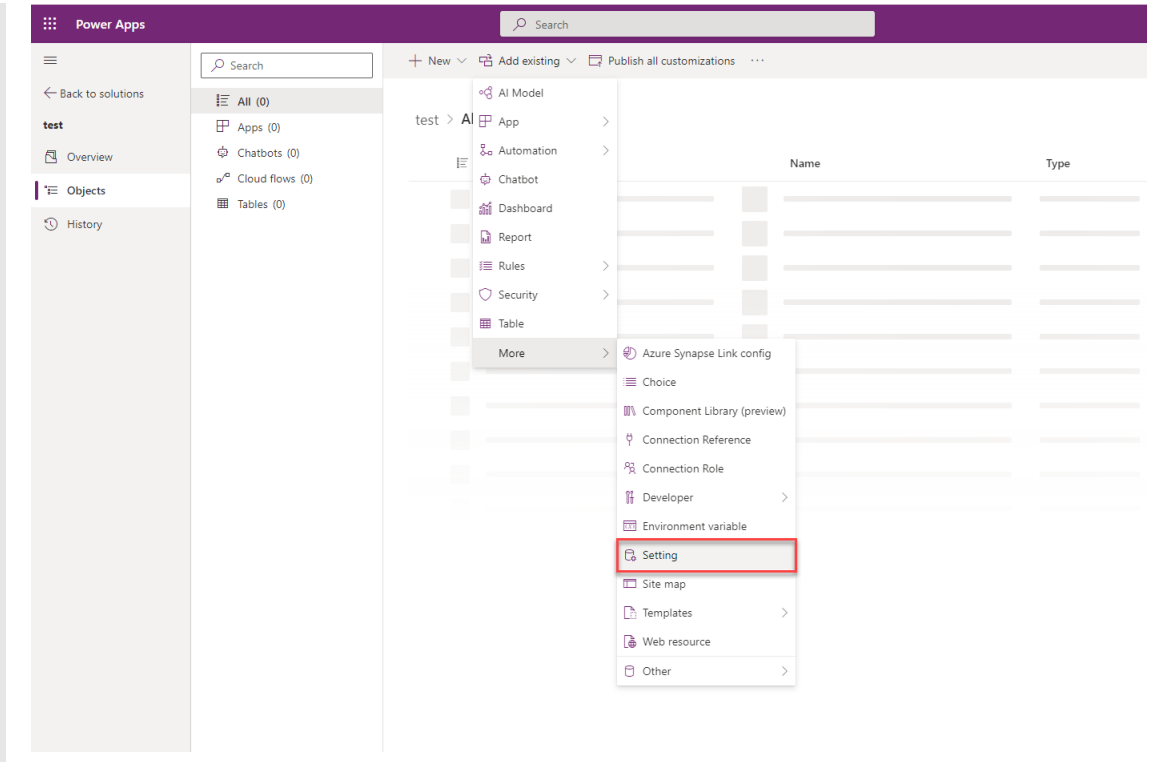
Turn on the enhanced email template selection experience for apps across your organization. If you need to, you can turn off the enhanced email template selection dialog for a specific app. And then, the users of the app see the default email template editor page.

Enable the enhanced email selection dialog

1. In Power Apps, select the environment the environment that contains your solution.
2. Select **Solutions**, and then select the solution in which you want to turn on the enhanced template editing experience.

   > **Note**
   >
   > Don't select the default solution to configure the template.

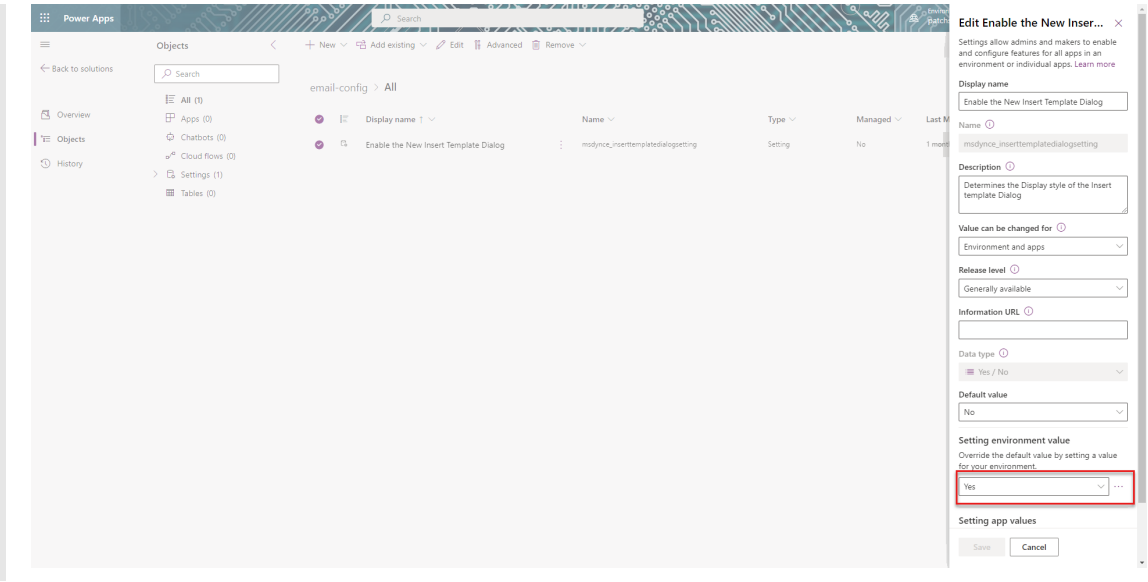
3. Select **Add Existing** > **More** > **Setting**.



4. On the **Add existing Setting Definition** pane, select the **Enable the New Insert Template Dialog** option and then select **Next**.

5. Select **Add** on the **Selected Setting Definition**. The **Enable the New Insert Template Dialog** option is added to your solution. Select **Edit**.

6. Set the **Setting environment value** option to **Yes** on the **Edit Enable the New Insert Template Dialog** pane.



7. Select **Publish All Customizations**.

Disable the enhanced email selection dialog for an app

For an app to display the default email template selection dialog, you must disable the enhanced email template selection option. To disable the option for a specific app, you must add the app to the Solution in which you've added the email template selection option. Perform the following steps:

1. Go to **Power Apps** instance.
2. Select **Solutions**.
3. On the **Solutions** page, select the Solution in which you've added the email template selection option.
4. Go to **Add Existing** > **App** > **Model-driven app**> **Add existing model-driven apps** pane. Select the app for which you want to disable the enhanced insert email template selection dialog. The app is added to the solution.
5. Select the **Enable the New Insert Template Dialog** option in the solution.
6. On the **Edit Enable the New Insert Template Dialog**, in the **Setting app value** section, the selected app is displayed.

7. Select **New app value** for the app, and select **No** for the specified app.
8. Select **Save** and **Publish All Customizations**.

See also

How to create an email template in model-driven apps
Customize an email template using the template editor

Configure the enhanced email template editor page

Article • 04/04/2023

You can configure the enhanced email template editing experience for apps across your organization. If you need to, you can turn off the enhanced email template page for a specific app. And then, the users of the app see the default email template editor page.

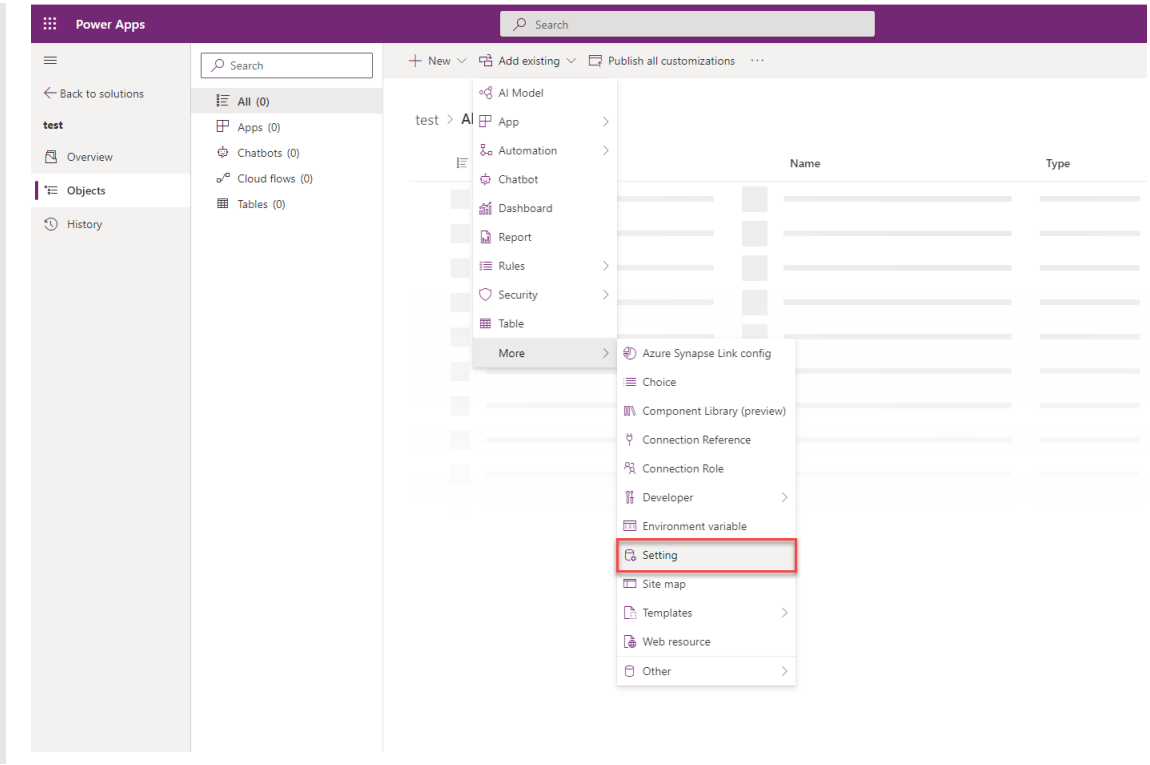
> **Note**
>
> - You must have an active subscription to **Dynamics 365 Customer Service Enterprise** to use the enhanced email template editor.
> - In Customer Service workspace and Customer Service Hub, the enhanced email template dialog is enabled by default as an early access feature.

Enable the enhanced email template editor

1. In Power Apps, select the environment that contains your solution.
2. Select **Solutions** on the left navigation pane, and then select the solution where you want to turn on the enhanced template editing experience. If the item isn't in the left navigation pane, select ...More and then select the item you want.

   > **Note**
   >
   > Don't select the default solution to configure the template.

3. Select **Add Existing** > **More** > **Setting**.



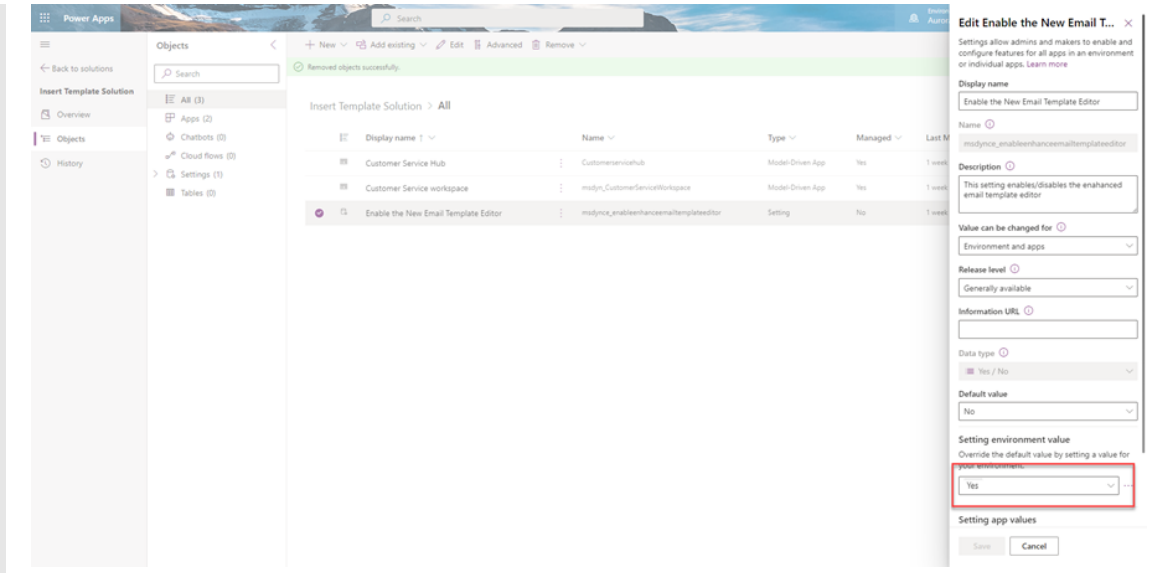
4. On the **Add existing Setting Definition** pane, select the **Enable the New Email Template Editor** option and then select **Next**.

5. Select **Add** on the **Selected Setting Definition** to add the **Enable the New Email Template Editor** option to your solution.

6. Go to **Add Existing** > **App** > **Model-driven app**> **Add existing model-driven apps** pane.

7. Select the **Enable the New Email Template Editor** option. The **Edit Enable the New Email Template Editor** pane appears.

8. Set the **Setting environment value** option to **Yes** on the **Edit Enable the New Email Template Editor** pane.



9. Select **Publish All Customizations**.

Disable the enhanced email template editor for an app

For an app to display the default email template selection dialog, you must disable the enhanced email template selection option. To disable the option for a specific app, you must add the app to the Solution in which you've added the email template selection option. Perform the following steps:

1. Open the **Power Apps** environment.
2. Select **Solutions** on the left navigation pane. If the item isn't in the left navigation pane, select ...More and then select the item you want.
3. Open the Solution in where you've added the email template selection option.
4. Go to **Add Existing** > **App** > **Model-driven app**> **Add existing model-driven apps** pane. Select the app for which you want to disable the enhanced insert email template selection dialog. The app is added to the solution.
5. Select the **Enable the New Email Template Editor** option in the solution.
6. On the **Edit Enable the New Email Template Editor**, in the **Setting app value** section, the selected app is displayed.
7. Select **New app value** for the app, and select **No** for the specified app.
8. Select **Save** and **Publish All Customizations**.

See also

How to create an email template in model-driven apps
Customize an email template using the template editor

Add a default signature template to a queue

Article • 10/03/2022

You can add a default signature template for a queue to ensure that emails sent with the queue as the sender have consistent email signatures. When you send an email with the queue as the sender or reply to messages received by the queue, the default signature is added to the body of the email. If you don't specify a default signature template for a queue, the application adds the signature queue's owner.

Prerequisites

Email signature templates must be available before adding them to a queue.

Set up default email signature for queues

1. Go to one of the admin apps, and perform the following steps:

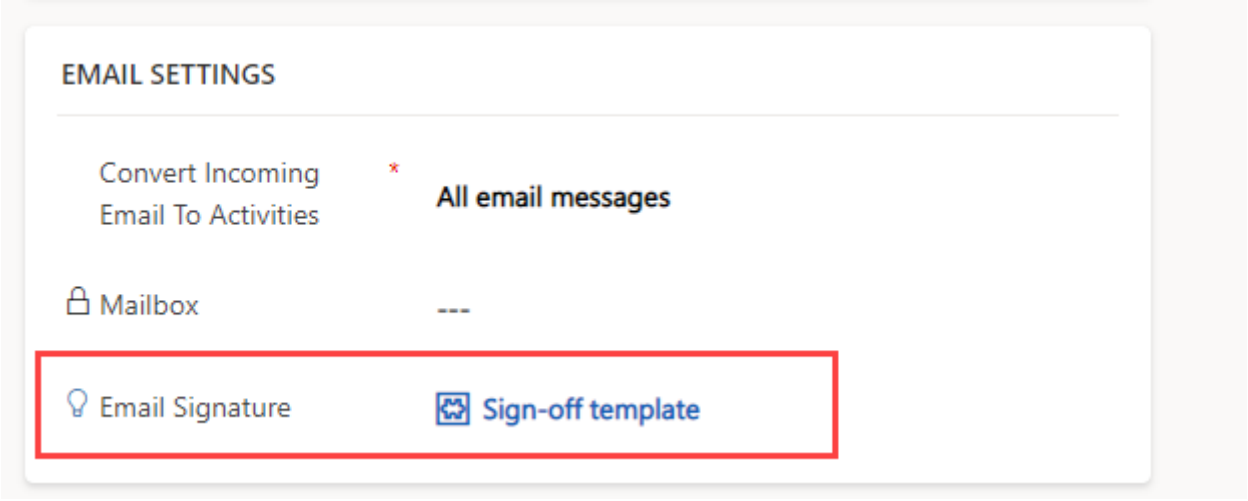
   Customer Service admin center

   a. In the site map, select **Queues** in **Customer support**.

   b. On the **Queues** page, select **Manage** for **Basic queues**.

2. To create a queue, select **New**. To edit a queue, select the queue in the list of queues, and then select **Edit** on the command bar.

3. In the **EMAIL SETTINGS** section, specify the signature template in **Email Signature**.



See also

Create a signature for emails

Understand the email experience

Article • 02/15/2022

Having the ability to communicate effectively with customers can lead to increased sales and customer satisfaction. The email capability in customer engagement apps empowers users with the ability to respond and provide timely customer interaction effortlessly through quick email access with enhanced features and functionality. You can compose, reply, and review email, as well as quickly attach and send images that add value and support to customer communication using streamlined functionality. You can also ensure interactions between you and your customers are consistent and professional by using email templates with rich text and images.

You can work in either the **navigate-to** email or the **contextual** email experience. The difference between the navigate-to vs. contextual email experience is where the email displays on your screen. Both experiences use the same **Enhanced Email** form, which is enabled by default out-of-the-box (OOTB).

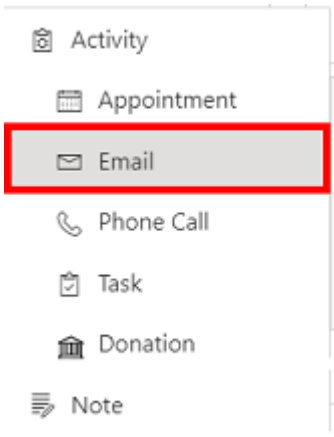
> **ⓘ Important**
>
> - **Contextual** email is also referred to as enhanced email. Please be aware that there isn't any special functionality associated with the contextual email experience, other than it is a pop-up experience.

- **Navigate-to email experience**: Always displays in a new screen.
- **Contextual email experience**: Can only be initiated from the timeline, displays email in a pop-up screen, and allows you to:
  - Move to different pages without losing email content.
  - Minimize the email window to return to the records you were working on.
  - Simultaneously view, compose, and reply to five emails in pop-up windows when enabled.

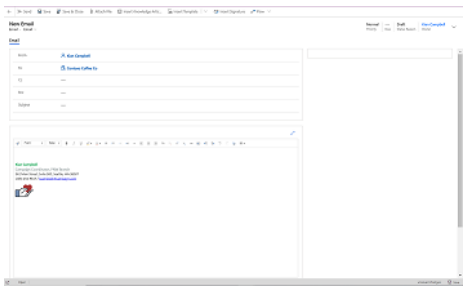
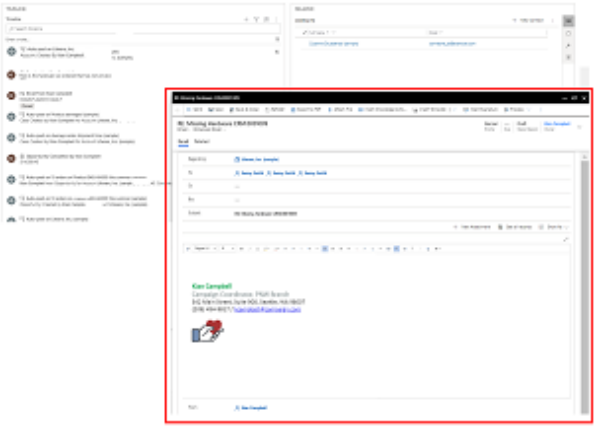
The following highlights the difference between the "navigate-to" and contextual email experience in the timeline based on how your system administrator has configured your email:

1. Select **Create a timeline record**.

2. Select **Email**.



Depending on the experience you are using, your email will display as follows:

Navigate-to email experience	-	**Contextual email experience**
		
The "navigate-to" email will display in a new screen.		The contextual email will display in a pop-up window on your current screen.

> **ⓘ Important**
>
> - The pop-up window only opens when the height and width of your screen size is at least 400 x 650 pixels or greater. If lower, "navigate-to" email will be the default experience.
> - The contextual email experience is available only for timeline.

> **ⓘ Note**
>
> - If you use customized forms in email, you will still be able to see and use them. The **Enhanced Email** form showcases various email capabilities and functionality.

For more information, see View, compose and respond to email.

See also

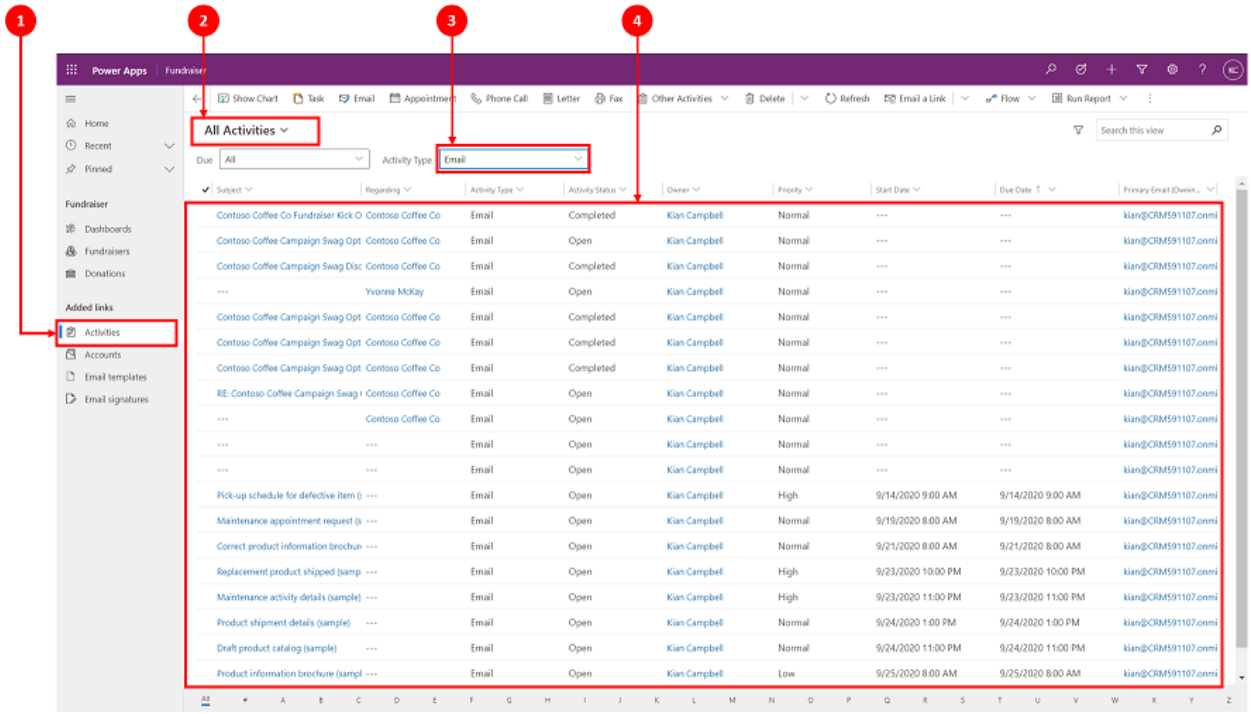
Set up enhanced email
Insert an email template

View, compose and respond to email

Article • 06/09/2023

Users can view, create, and send email faster with streamlined access that helps users compose, reply, and send emails using rich text editing and drag-and-drop attachment features and functionalities to embed images in emails.

Access and view emails



Legend

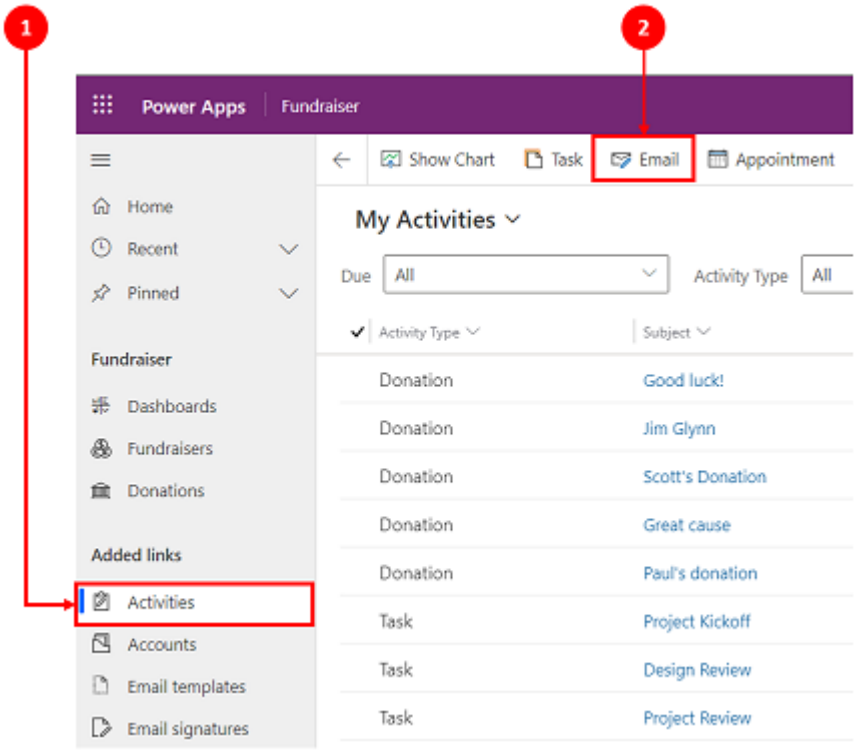
1. Select **Activities**
2. Select **All Activities**
3. Under **Activity Type** select **Email**
4. Email list appears in the screen below

Compose an email

Email capabilities, like rich-text editing and drag-and-drop or copy-and-paste images enriches customer interactions when composing email.

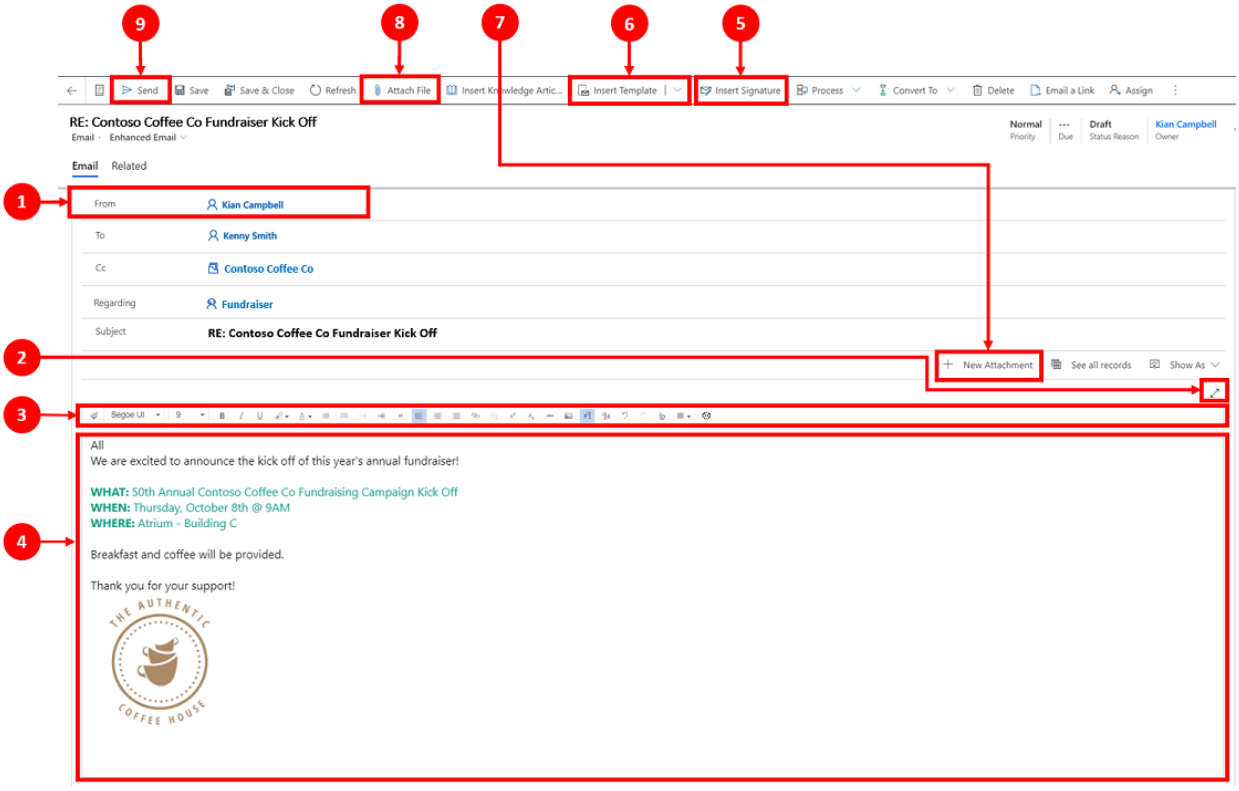
When enabled by your system administrator, you can access email from the top navigation bar.

Compose an email



1. Select **Activities**
2. On the command bar, select **Email**. An email then opens in a new window where you can begin composing.

Anatomy of an email form



Legend

1. **From**. The name displayed in the **From** field is automatically populated based on the user who is currently signed in.
2. **Expand**. The **Expand** icon allows you to compose your email in a full-screen view and minimize when done.
3. **Rich text editor**. This tool bar helps you format emails. The editor is displayed as a single line that can be expanded to view the full list of editing features by default. For more information, see Use the rich text editor toolbar in email and Accessibility shortcuts for email. **User Personalization**. The icon allows you to set the default font and font size for your emails. Once set, the **Font** and **Font Size** display these values by default.
4. **Body**. The body is where you compose and/or reply to an email.
5. **Insert Signature**. Use this command to personalize your message.
6. **Insert Template**. This is used to apply an email template.
   For more information, see Insert an email template.

   > **Note**
   >
   > The **To** box must contain a recipient to select a template.

7. **New Attachment**. This command is used to add a file to your email.
8. **Attach File**. This command uses the 'plus' icon functionality to add attachments.

   > **Note**
   >
   > After you save your email, you can use Attach file and New Attachments interchangeably.

9. **Send**. Select this icon to **Send** your email when you are done.

   > **Important**
   >
   > - The **From** and **To** fields are automatically populated based on the user and the account and contact of the original record.

Reply to an email

The way you can reply to an email depends on where you are in your app.

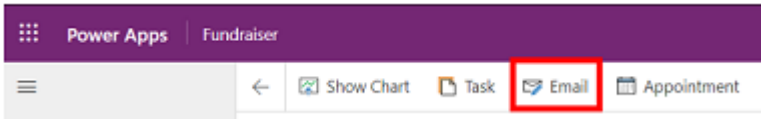
When enabled by your system administrator, the email option displays in the top navigation bar and in the activities command bar.

> **Note**
>
> The best performance is achieved when the HTML content size is 1 MB or less. When your HTML content size exceeds 1 MB, you might notice slower response times for loading and editing content. By default, image content is referenced from the content HTML but isn't stored as part of the HTML content, so in the default configuration, images don't negatively impact performance.

Access email

When accessing email, there are a couple of options you can use.

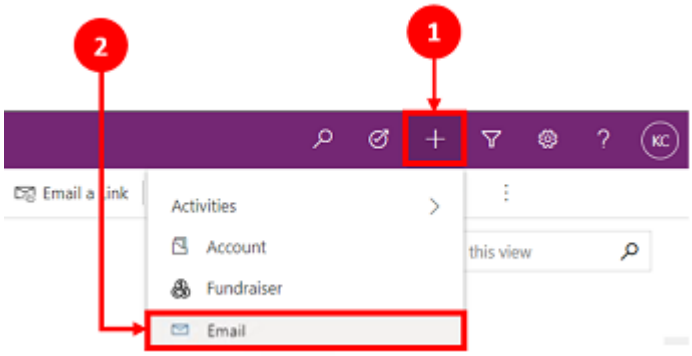
- **Option 1:**

  - Select **Email** on the command bar.

  > **Note**
  >
  > Email option will only appear in the drop-down list and the command bar when enabled by your system administrator.

- **Option 2:**

  1. From the navigation bar, select the plus icon.
  2. Select **Email** from the drop-down menu.

Set the default font and font size

You can set the default font and font size for your email text. Perform the following steps:

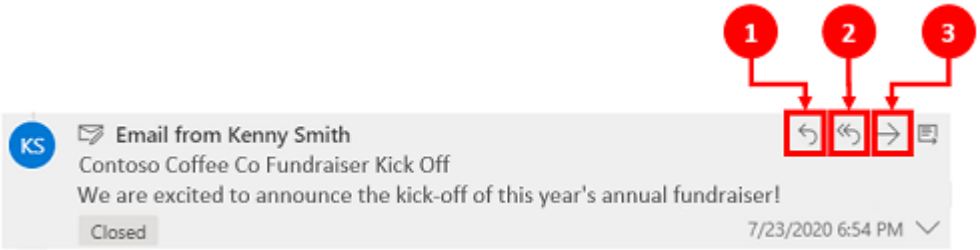
- In the email editor, in the Rich text editor tool bar, select .
- In **User Personalization** specify the **Font** and **Font Size**.
- Select **Ok**. The application defaults the values specified in the Font and Font Size fields of the rich text editor toolbar.

If your administrator has set default font and font size, the application displays the set values in the Font and Font Size fields of the rich text editor toolbar.

Reply to email in timeline

When replying to emails in Timeline, the command bar in the top-right corner provides you with reply options. When you select an option, your email automatically is set and opens in that state ready for you to begin your message.

You can use the following command options when working with emails in the timeline.



1. **Reply**. Use this command to reply directly the sender of the email you received.
2. **Reply All**. Use this command to reply to everyone on an email you received.
3. **Forward**. Use this command to forward the email to someone else.

Attach a file to email

Article • 06/09/2023

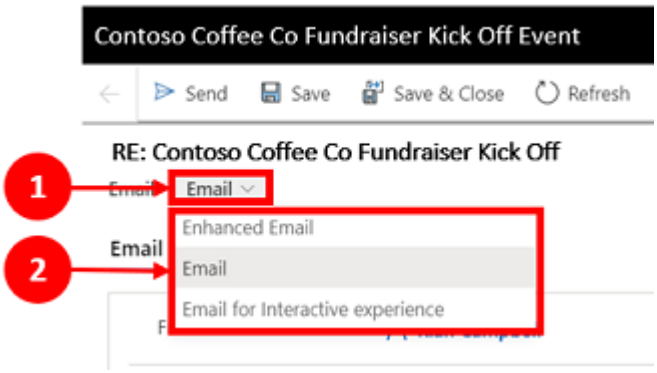
The option to attach files to an email is a useful feature when you need to share additional information. Use the **Attach file** button on the command menu or the **New Attachments** button in the email body to attach files to the email.

> **ⓘ Important**
>
> The default file size limit for an email file attachment is 5 MB. The size limitations on email file attachments can be increased by your system administrators.

Work with attachments

You can attach an unlimited number of files to an email; however, there are file size limitations that are managed by your system administrator.

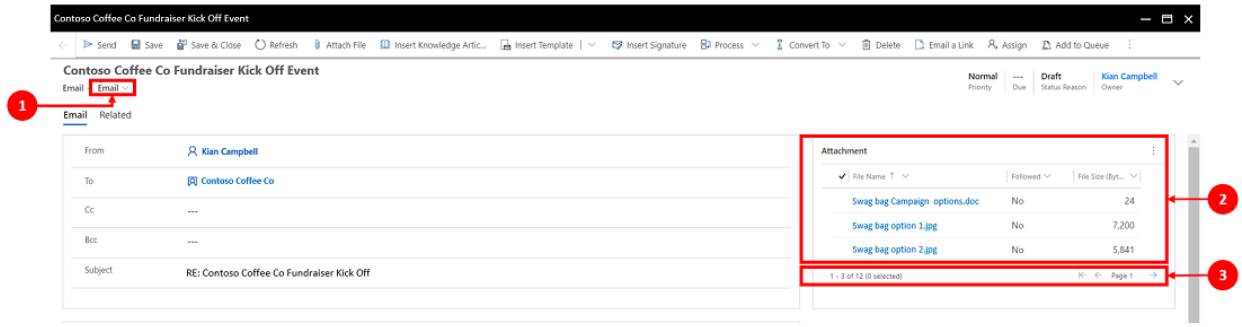
Enhanced email is the default email form, however you can switch forms by doing the following:



1. Under the email subject name, select on the caret (v) next to **Email**
2. A drop-down appears with a list of email form options you can choose from.

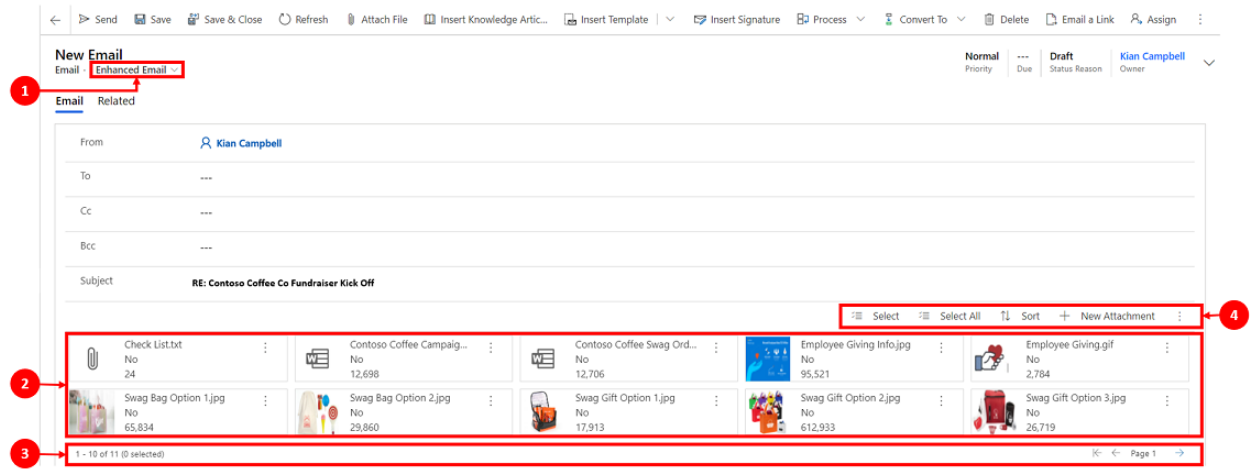
File attachments display differently, depending on the email form you're working in. You can switch email forms without losing information.

Email form file attachment



1. **Email**. This display confirms which email form you're working in.
2. **Attachment**. This section displays a list of file attachments in a vertical view and only displays the first three attachments.
3. **File count**. This displays when you have more files than what can be viewed and allows you to see the total number of attached files on the left side under the last attachment with the option to page over to see more files.

Enhanced email form file attachment



1. **Enhanced Email**. This display confirms you're working in the **Enhanced email** form.
2. **Attached files**. This section displays all your email attachments in a tile view above your message horizontally. The defaulted setting for the maximum number of files that can display is five attachments before displaying the page forward functionality.
3. **File count**. This displays when you have files that occupy more than two rows and allows you to see the total number of attached files on the left side under the last attachment with the option to page over to see more files.
4. **Attachment Commands**. This allows you to use the select, select all, sort, delete, and download functionality when working with your file attachments.

Work with the attachment command bar

When you've attached one or more files to a message, you can manage them using the file attachment commands.

Select commands

Select commands allow you to select individual files or multiple files at once.

Legend

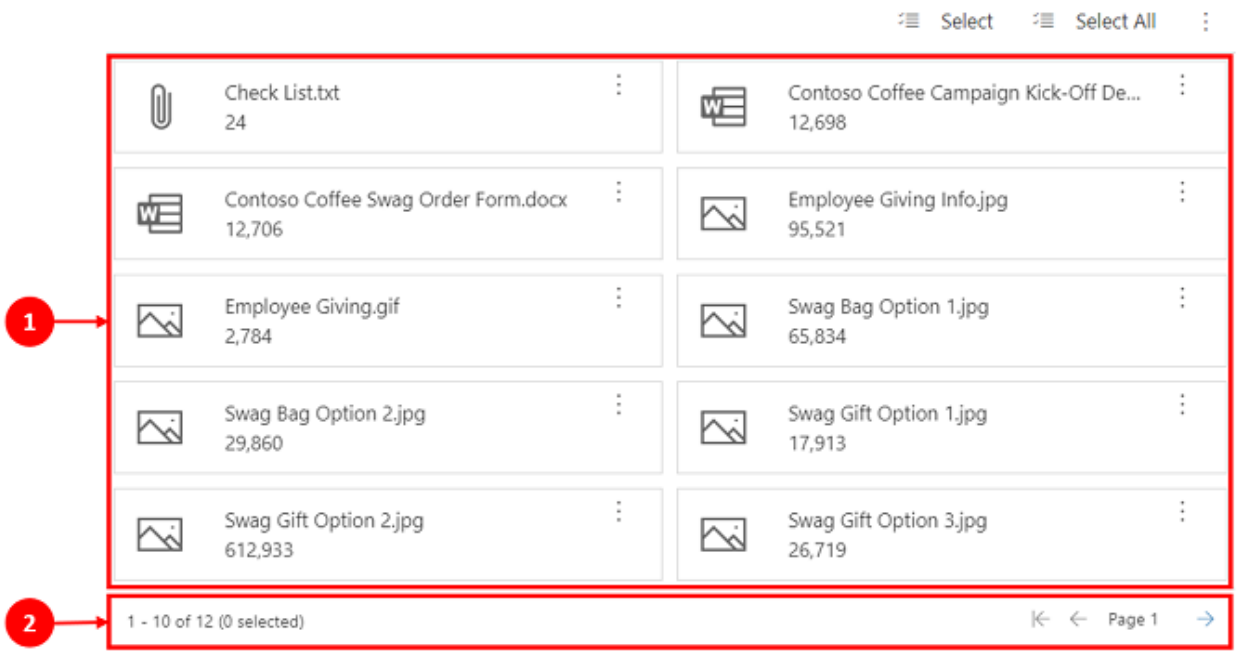
1. **Select All**. This command is located on the right, above your attached files and allows you to select all file attachments at once.

   > **Note**
   >
   > **Select All** only selects files that are visible. If you have multiple pages of file attachments, you will need to go to that page and select those files independently.

2. **Tile Color Transparency**. The background color of selected file attachments changes to light grey to identify which files have been selected.

3. **Check box** You can also verify which files have been selected by viewing whether the checkbox in the top-right corner of the file attachment is selected.

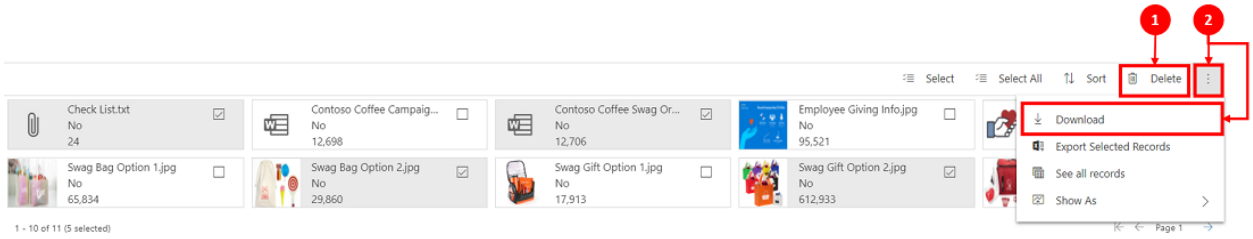
Formatting of file attachments in email can be realigned based on the device being used and format it's being worked in.



1. **Format Display** Regardless of format display, file attachments will only display the number of files that are enabled by your system administrator.
2. **Page view**. The page view displays the total number of email attachments and always is displayed under the file attachments.

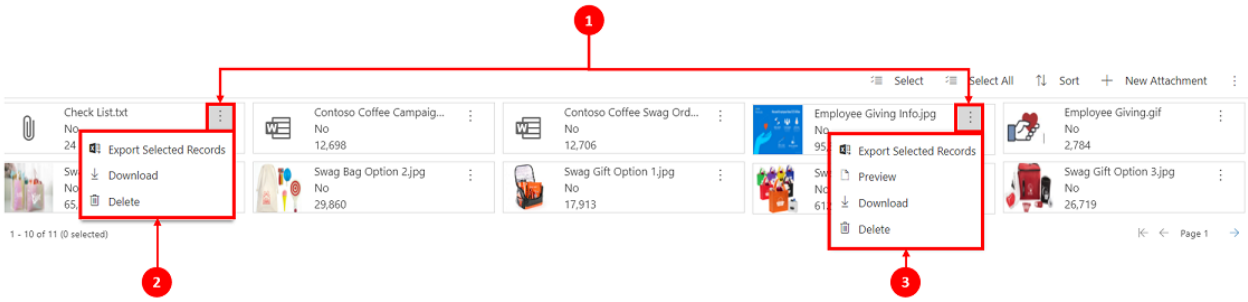
Delete and download commands

These are two of the most important commands when working with images.



1. **Delete**. This command works with the **Select** commands. You must first select a file before you can delete it. A confirmation request appears, requiring you to confirm you want to delete the file(s) you've selected.
2. **Download**. This command also works with the **Select** commands and your browser download settings, allowing you to download an individual file or multiple files at once.

Preview image attachments



1. **More options**. This command provides a list of actions for that file type.
2. **Non-preview image**. Only non-preview image types allow you to either **export selected records**, **download**, or **delete** the attached file.
3. **Preview image types**. Allow you to **export selected record**, **preview**, **download**, or **delete** the attached file. When you select the **preview** option, a pop-up window appears, displaying the image with the image name listed below.

Supported email file attachments

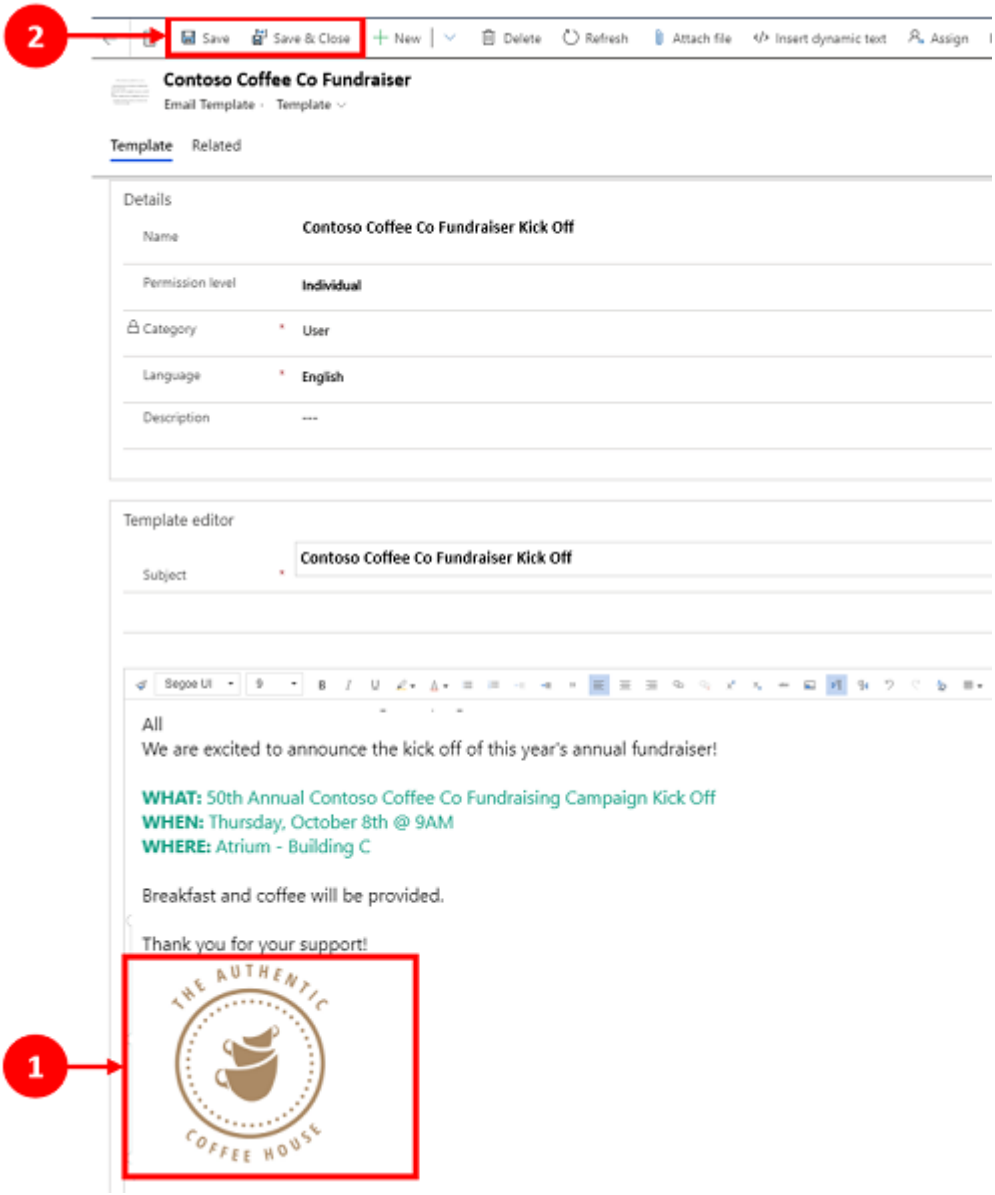
The following is a list of file image types that are supported:

image type	supports preview	supported inline (in editor)
BMP.bmp	Yes	Yes
GIF.gif	Yes	Yes
ICO.ico	Yes	Yes
JPG.jpg	Yes	Yes
PNG.png	Yes	Yes
SVG.svg	Yes	Yes
PDF.pdf	Yes (preview not supported on IE)	No

View and insert images in email

The use of visual aids helps users convey a tremendous amount of information with just a glance. Having the ability to view and insert inline images in email using the drag-and-drop or copy-and-paste functionality is a powerful tool for users. Additionally, you can browse to a file or reference an online URL using the image toolbar button.

You can drag-and-drop or copy-and-paste images into the email.



1. **Email images** You can adjust the image size.

2. **Save**. When you complete your edits, select **Save** or **Save & Close**.

> **Note**
>
> There's a 1 MB file size limitation when adding an inline image to an email for email templates. (For new or replied emails, there isn't a limit to the email size (it becomes part of the total email size).

Use the rich text editor toolbar in email

Article • 10/03/2022

The rich text editor toolbar provides features and functionality that allows you to work with rich text formats in emails to better communicate with your customers.

Formatting options

The following table describes the different formatting features and functionality options available in the rich text editor that you can use in the email form.

> **Note**
>
> You can access your browser's context menu by pressing **Ctrl** + right-click. This is useful if you need to use your browser's built-in spell checker. Otherwise, you can use the right-click to provide contextual formatting for any element you might be using.

Icon	Name	Shortcut key	Description
	Format Painter	Ctrl+Shift+C, Ctrl+Shift+V	Apply the look of a particular section to another section.
	Font	Ctrl+Shift+F	Select your desired font. The default font is Segoe UI. **Note**: When you select any formatted content, the font name for that content displays. If your selection contains multiple fonts, the topmost font name of your selection is displayed.
	Font size	Ctrl+Shift+P	Change the size of your text. The default size is 9. **Note**: When you select any formatted content, the font size for that content displays. If your selection contains multiple font sizes, the topmost font name of your selection is displayed.
	Bold	Ctrl+B	Make your text bold.
	Italic	Ctrl+I	Italicize your text.
	Underline	Ctrl+U	Underline your text.

Icon	Name	Shortcut key	Description
	Text Highlight Color		Make your text stand out by highlighting it in a bright color.
	Font Color		Change the color of your text.
	Bullets		Create a bulleted list.
	Numbering		Create a numbered list.
	Decrease Indent		Move your paragraph closer to the margin.
	Increase Indent		Move your paragraph farther away from the margin.
	Block Quote		Apply a block-level quotation format in your content.
	Align Left	Ctrl+L	Align your content with the left margin. (Commonly used for body text to make it easier to read.)
	Align Center	Ctrl+E	Center your content on the page. (Commonly used for a formal appearance.)
	Align Right	Ctrl+R	Center your content on the page. (Commonly used for a formal appearance.)
	Link		Create a link in your document for quick access to web pages and files. Pasted or typed URL text is converted into a link. For example, "http://myexample.com" will become "http://myexample.com ". In the **Link** dialog box, choose the type of link you'd like to insert. The **Link Info** tab allows you to choose the link type as well as set the link protocol and URL. The **Target** tab is only available for the URL link type. It specifies the location where the link will open after you select it.
	Unlink		Delete a link in your email or document. When you place the cursor on a link, the **Unlink** button on the toolbar becomes active. Select the button to remove the link and make it plain text.

Icon	Name	Shortcut key	Description
	Superscript		Type very small letters just above the line of text.
	Subscript		Type very small letters just below the line of text.
	Strikethrough		Cross out text by drawing a line through it.
	Insert Image		You can insert an image by directly copying and pasting it inline in the editor, dragging and dropping it from your desktop or local folder directly into the editor, or by typing a URL. The following formats are supported: .PNG, .JPG., or .GIF. To insert an image inline in your article: 1. Drag and drop the image or copy and paste it directly into the article. 2. Drag any corner of the image to resize it. To insert an image using a URL or navigating to the local image: 1. Choose Insert Image. 2. In the **Image** property dialog, choose from the following options: • Select **Browse** to navigate to the image on your computer. • Or specify the web address of the image, and properties to define how the image will appear in the email or article. **Note:** ◦ If the image is located on the external server, use the full absolute path. ◦ If the image is located on a local server, you can use a relative path. ◦ If you want the image to be linked to a target, add a URL for the image. ◦ You can also specify if you want the targeted page to open in a new window, topmost window, same window, or parent window.
	Left to Right		Change the text to left-to-right for content such as a paragraph, header, table, or list. Commonly used for bi-directional language content. This is the default setting.

Icon	Name	Shortcut key	Description
	Right to Left		Change the text to right-to-left for content such as a paragraph, header, table, or list. Commonly used for bi-directional language content. The default setting is left-to-right.
	Undo Typing		Undo changes you made to the content.
	Redo Typing		Redo changes you made to the content.
	Clear All Formatting		Remove all formatting from a selection of text, leaving only the normal, unformatted text.
	Add a Table		Add a table to your content. After adding a table, you can do any of the following: • Resize table columns by clicking and dragging your mouse to resize to the columns to the desired width. • Select one or several cells within a table and apply specific formatting, add links to the selection, or cut, copy, or paste entire rows or columns. • Right-click to access the properties. This supports features such as cell type, width and height, word wrapping, alignment, merging and splitting cells horizontally and vertically, inserting or deleting rows and columns, row and column span, and cell and border color.
	User personalization		Select the default Font Name and Font Size. After they're added, the **Font** and **Font Size** reflect these values as default font and font size.
	Expand Toolbar		Displays when the toolbar is collapsed and not all options appear. Click to expand the toolbar and make all options visible.

> **Note**
>
> You can access your browser's context menu by pressing **Ctrl** + right-click. This is useful if you need to use your browser's built-in spell checker. Otherwise, you can use the right-click to provide contextual formatting for any element you might be using.

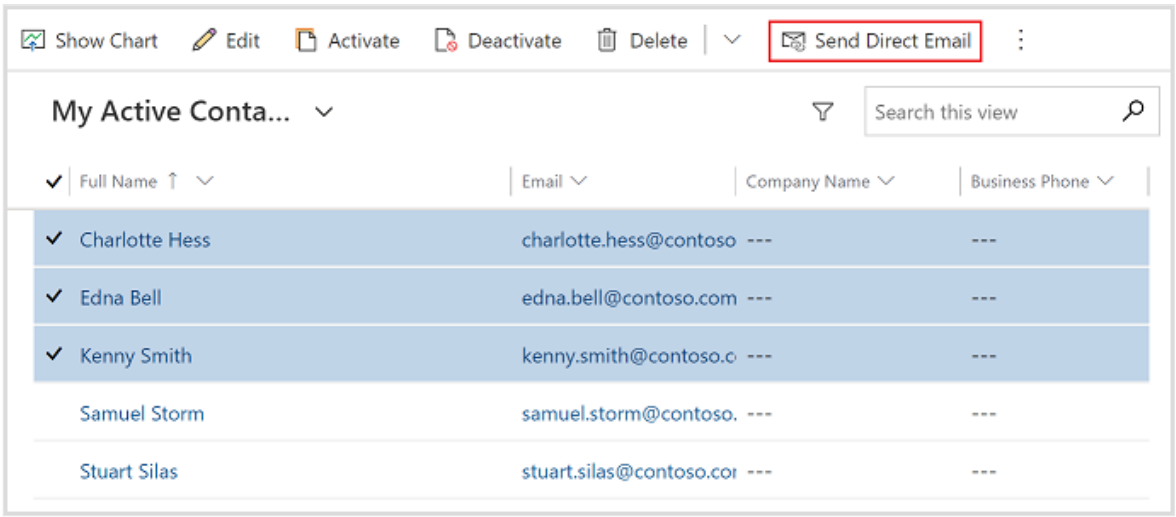
Send email to multiple recipients

Article • 02/15/2022

You can send an email to multiple recipients by using email templates. This is known as *direct* or *bulk* emailing. By default, the direct email feature is disabled. An administrator must enable the direct email feature by selecting **Yes** for **Enable Send Direct Email Action in Unified Interface for Send Email enabled tables** on the **Email** tab in the **System Settings** dialog box. More information: System Settings Email tab

To send email to multiple recipients

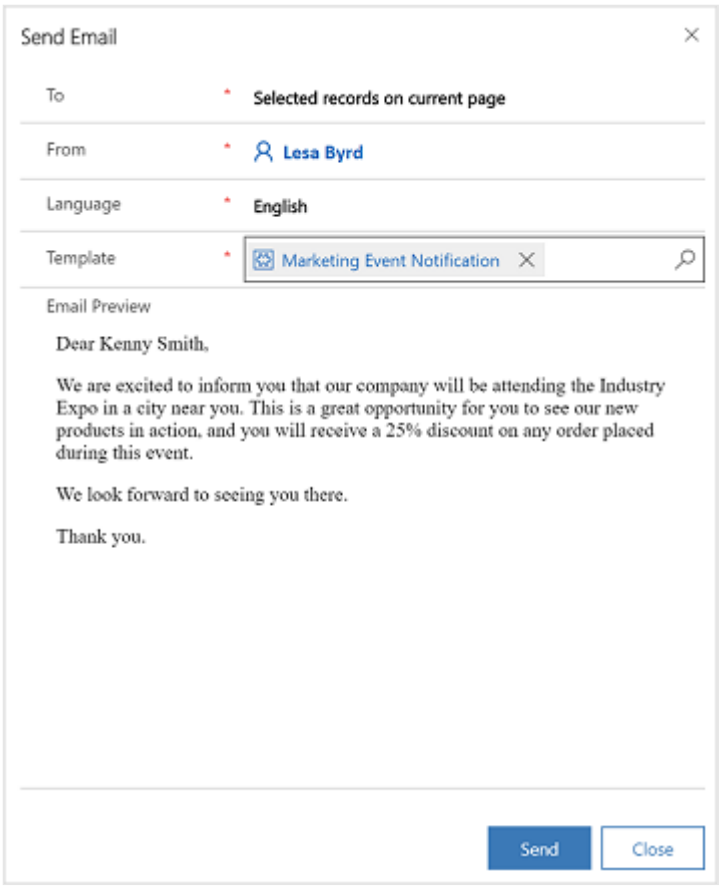
1. In the site map for the model-driven app, select a table to which you want to send email. For example, **Contacts**.
2. In the list of rows, select the contacts you want to send an email to.
3. On the command bar, select **Send Direct Email**.



4. In the **Send Email** pane, select an email template from the **Template** list.

> **Note**
>
> - If you have multiple rows that span multiple pages, you can select one of following options from the **To** list:
>   - **All rows on current page**: Sends the email to all rows displayed on the current page.
>   - **All rows on all pages**: Sends the email to all the stored rows.
> - If a few rows don't have an email address or they have an invalid email address, those rows will be skipped from sending the email.

5. Select **Send**.

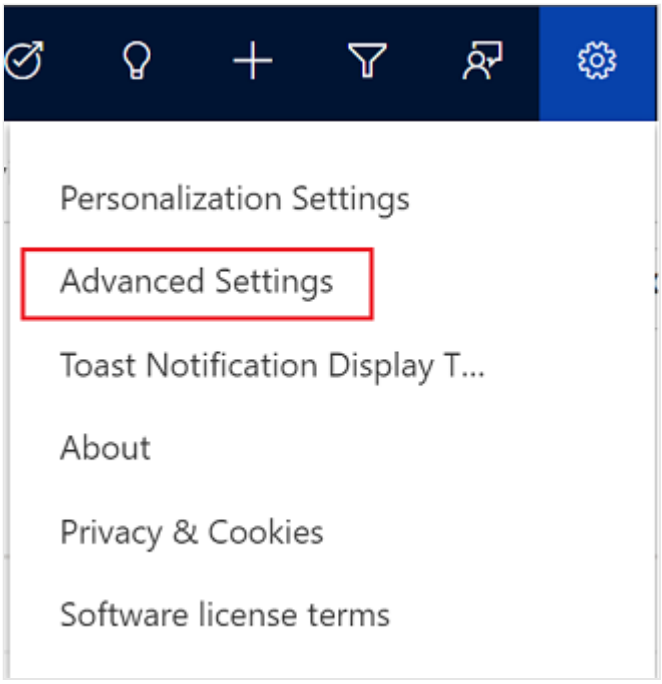


Check the status of bulk email action

You can check the status of bulk email action on the **System Jobs** page. You can see whether the bulk email job has failed or succeeded. If a job has failed, you can open the failed job to see its details.

To check the bulk email status

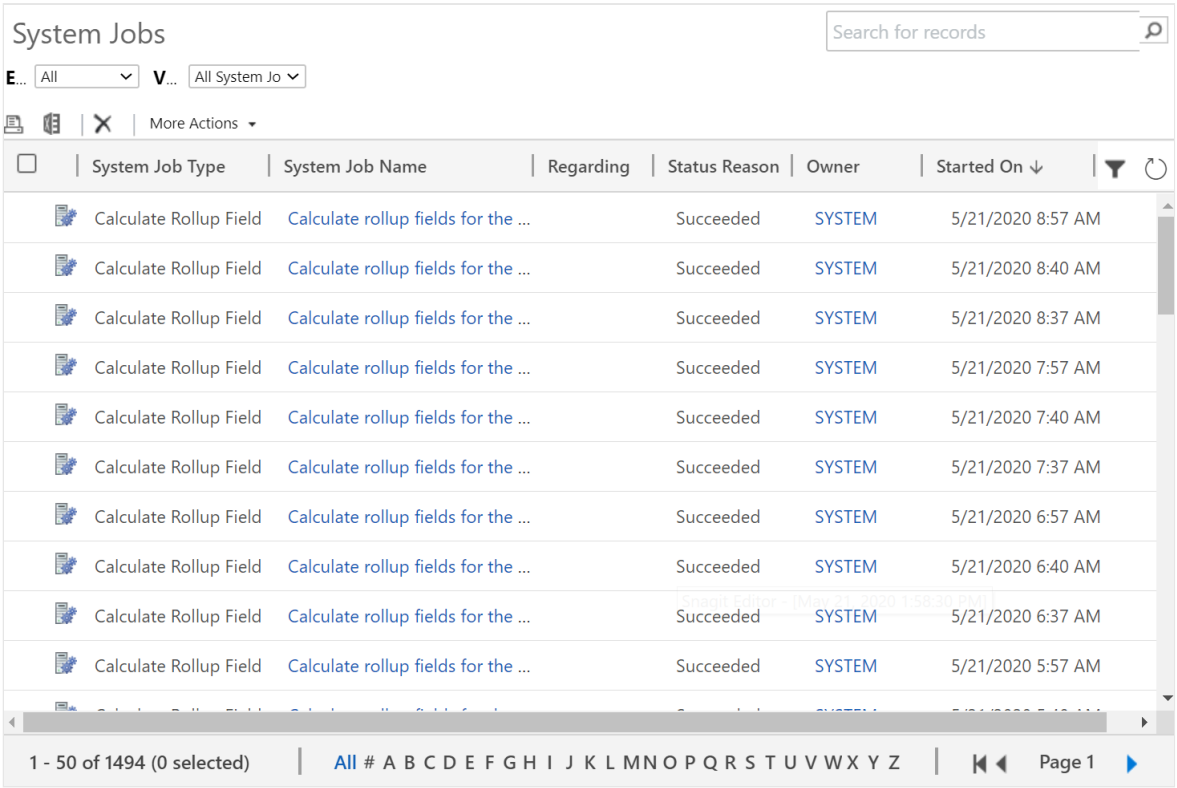
1. In your app, select the **Settings** icon, and then select **Advanced Settings**.



The **Business Management** page opens in a new browser tab.

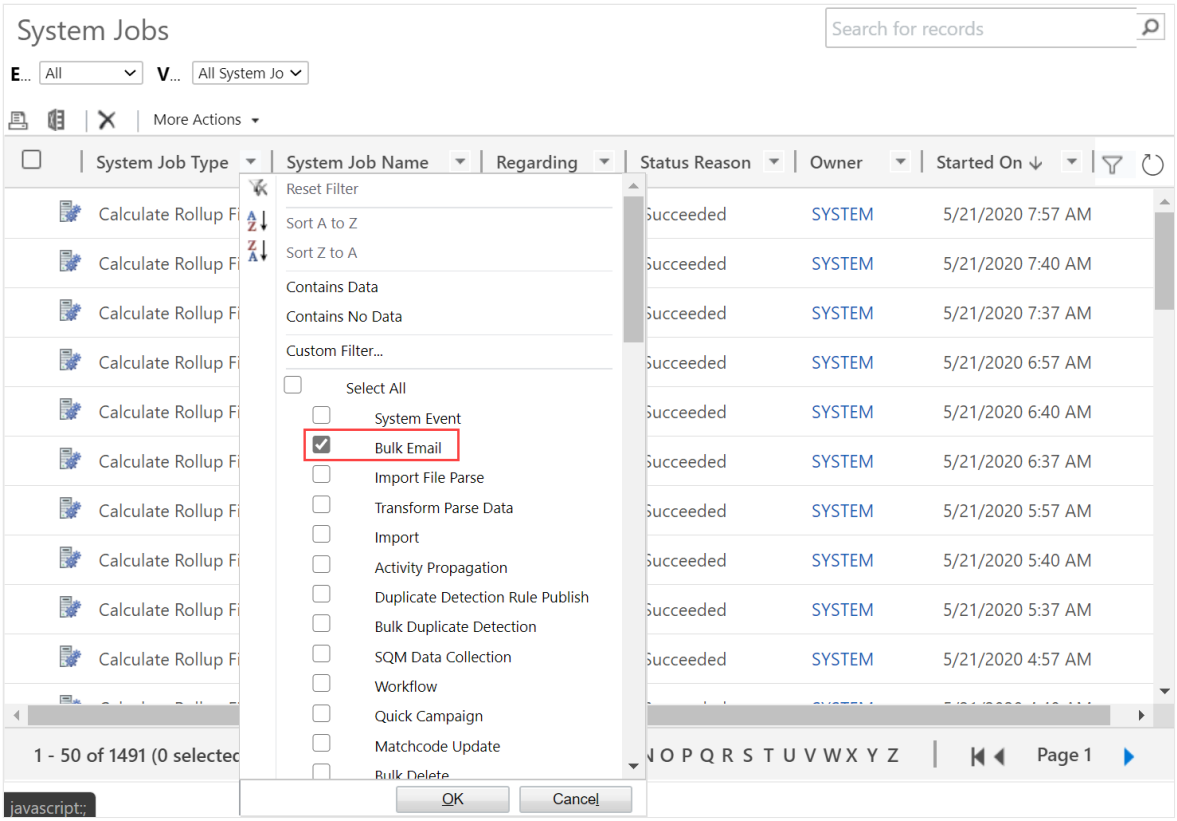
2. On the navigation bar, select **Settings**, and then under **System**, select **System Jobs**.

   A list of system jobs is displayed.

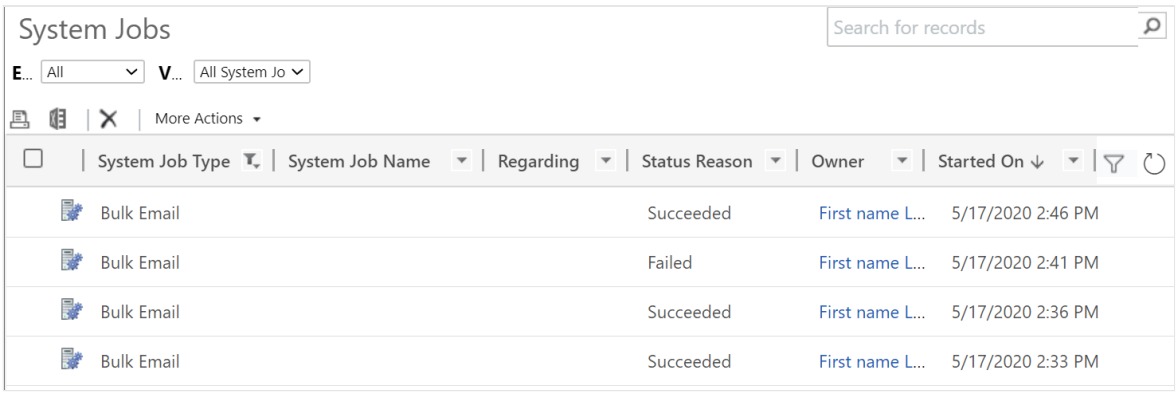


3. In the grid header, select **Filter** .

4. In the **System Job Type** column header, select the down arrow, select **Bulk Email**, and then select **OK**.



Bulk email jobs are displayed with their corresponding status.



5. Double-click the failed job to see its details.

See also

System Settings Email tab

Resolve an unresolved email recipient

Article • 02/15/2022

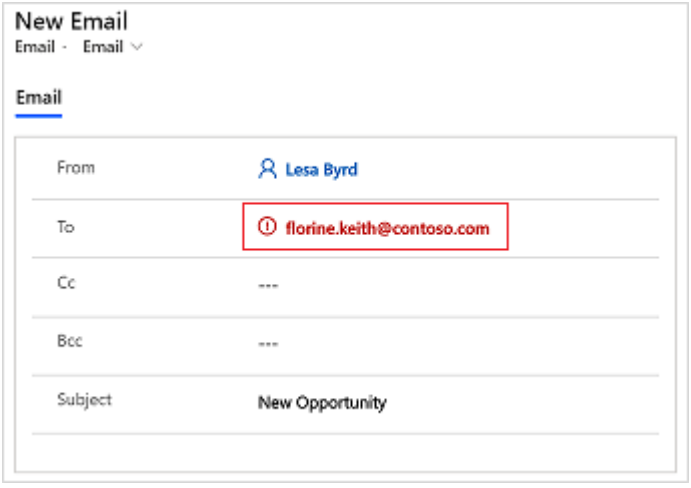
An *unresolved email recipient* is one whose email address isn't associated with any table rows in Microsoft Dataverse. By default, you can't send an email to an unresolved email recipient. If you enter an unresolved email recipient address, the email address is deleted as soon as you move the focus out of the **To**, **Cc**, or **Bcc** column. An administrator must enable the unresolved email recipient feature by selecting **Yes** for **Allow messages with unresolved email recipients to be sent** on the **Email** tab in the **System Settings** dialog box. More information: System Settings Email tab

After the feature is enabled, you can add an unresolved email recipient in the **To**, **Cc**, or **Bcc** column. The entered email address is shown in red. You can then select the email address and associate it with a table row in Dataverse without navigating away from the email form.

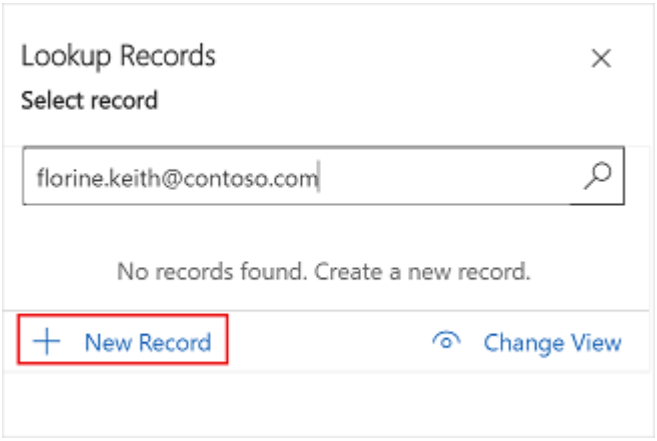
If you receive an email that has email addresses that aren't associated with a table row, the email addresses are shown in red. You can then individually select the email addresses and associate them with a table row. You can then send emails to the newly added email addresses.

To resolve an unresolved email recipient

1. Open the email editor and select the unresolved email recipient.

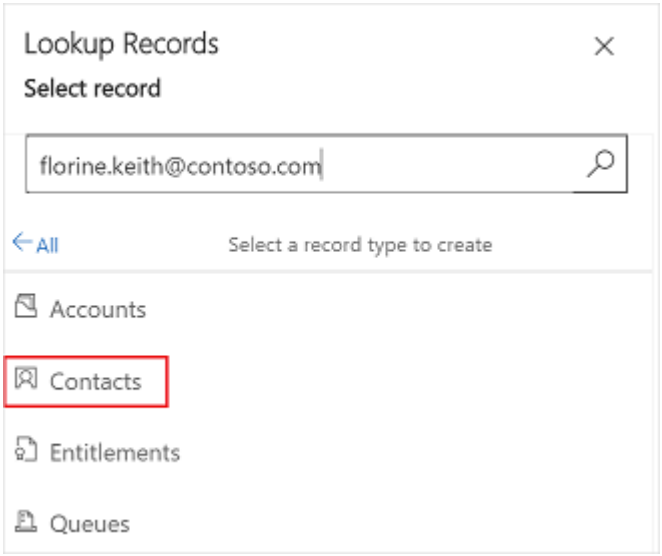


2. In the **Lookup Rows** pane, select **New Row**.

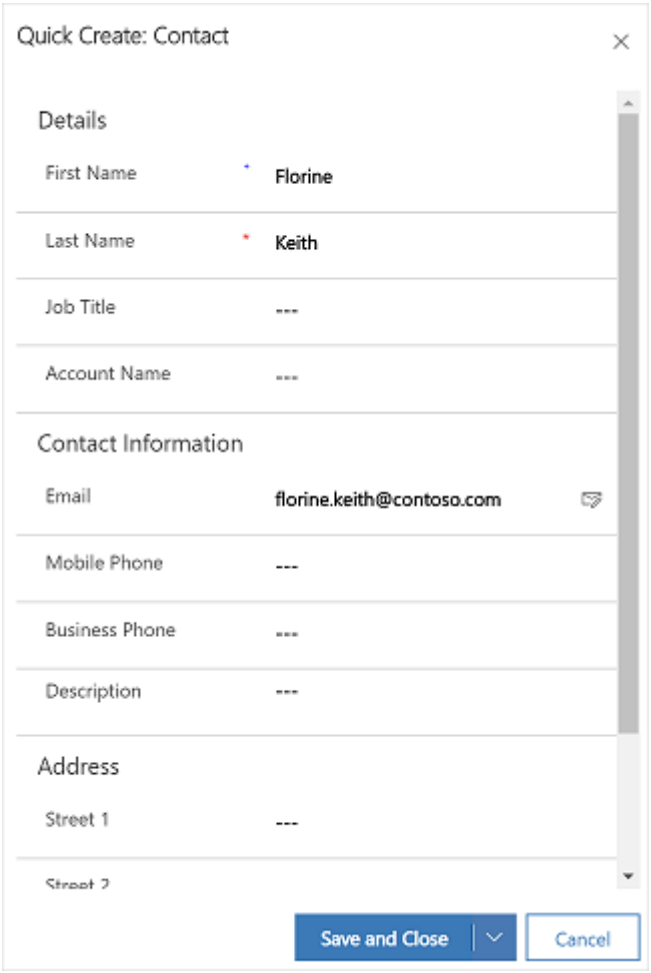


> **Note**
>
> If rows are displayed in search results, you can resolve the email to one of the existing rows.

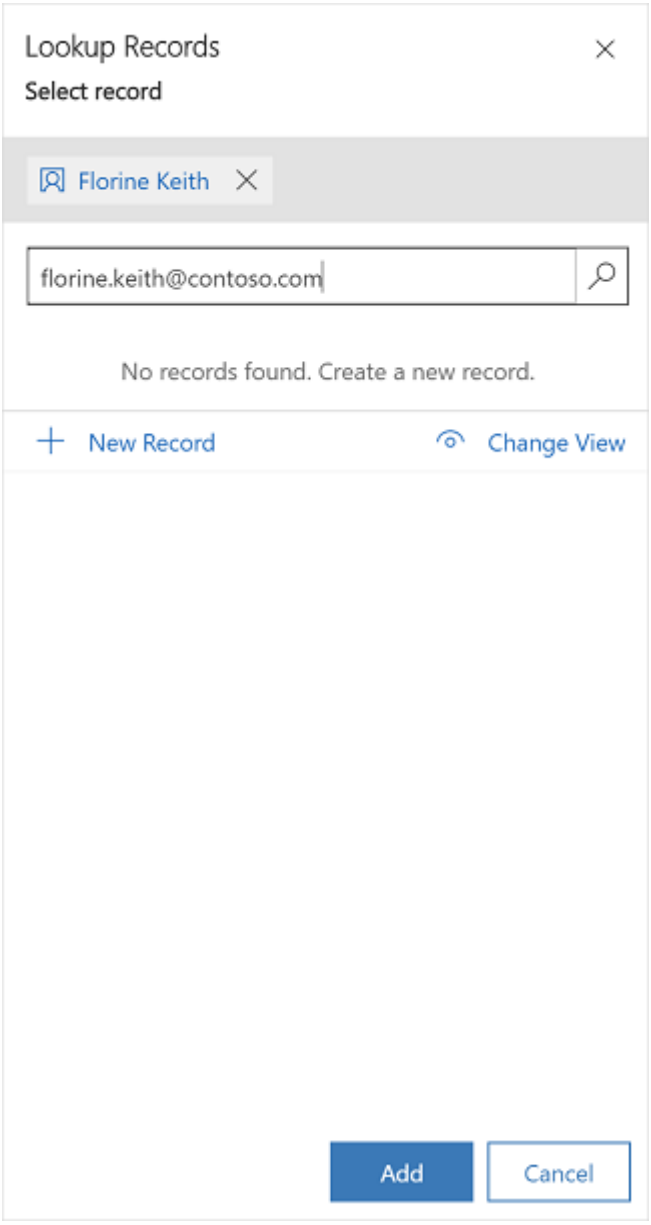
3. Select the row type to create. For example, **Contacts**.



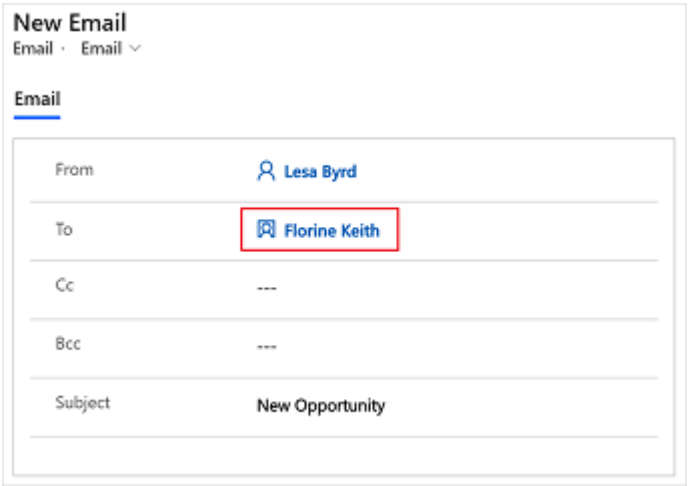
4. In the **Quick Create: Contact** pane, enter the required details, and select **Save and Close**.



5. The contact is created and selected in the **Lookup Rows** pane. Select **Add**.



6. The unresolved email recipient is resolved and shown in the **To** column in the email editor.



See also

Allow unresolved email recipients

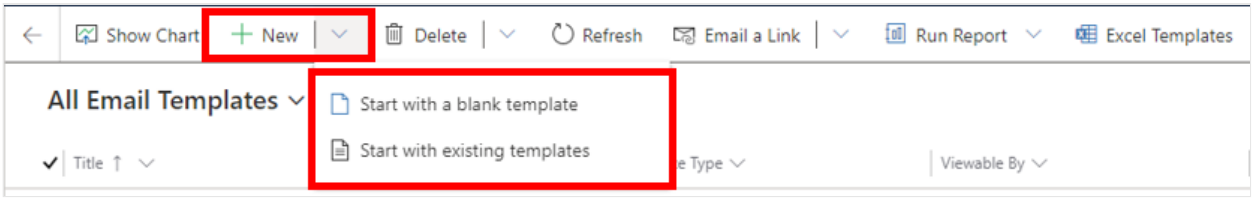
Create email templates

Article • 04/01/2023

Email templates are a fast and easy way to send consistent, professional, preformatted email messages to your customers. To create email templates, the legacy email template editor is available by default. However, the enhanced email template editor is displayed as a choice if it is enabled by your administrator.

You can create email templates by using one of the following options:

- **Start with a blank template**: Create a template from scratch. The editor that's displayed depends on wether the enhanced email template editor option is enabled.
- **Start with an existing template** : Create a template by choosing an existing template. The editor that's displayed depends on the editor in which the existing template was created.



Start with a blank template

When you start with a blank template, nothing is provided for you. You must add everything you want customers to see.

1. On the **Email Templates** command bar, select **New**, and then select **Start with a blank template**.

2. Enter the following details:

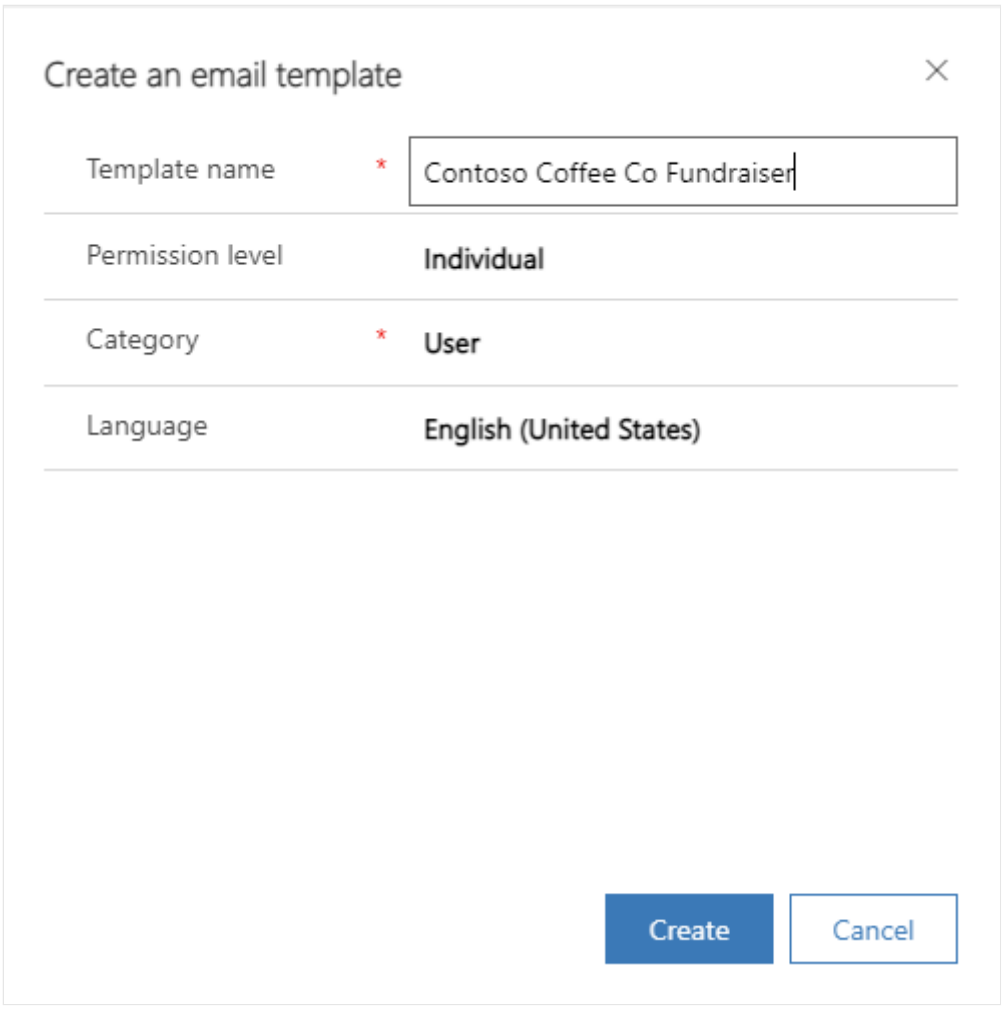
    - **Template name**: Give your email template a detailed name to help you identify it later.

    - **Permission level**: Select **Organization** to share your template with others or **Individual** for personal use.

    - **Category**: The default value is **User**. Categories determine which dynamic text fields are available for use in your template.

    - **Language**: Display installed language packs. **Language** also helps to categorize your templates.

- **Create**: Opens one of two editors where you can build your template.



3. Select **Create**. The template editor is displayed.

The editor page you see depends on whether your administrator has turned on the enhanced email template editor option:

- If yes, you'll use the enhanced email template editor page.
- If not, you'll use the email template editor page.

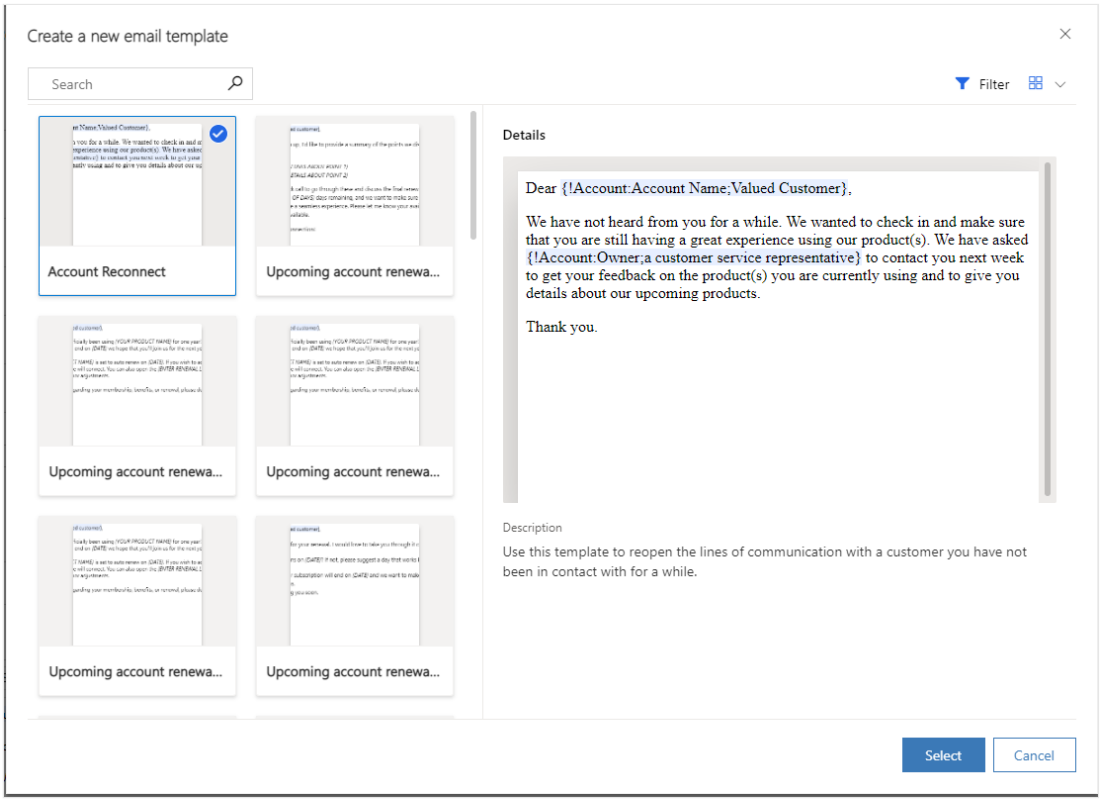
Start with existing templates

Start with an existing template to create an email template faster and with less effort. The template is pre-populated with data. All you need to do is customize it for your needs.

1. On the **Email Templates** command bar, select **New**, and then select **Start with existing templates**.

2. Enter the following details:

- **Search**: Search for the name of a template to start from. Search doesn't support regular expressions.
- **Browse** out-of-the-box templates, global and entity-specific, listed in alphabetical order. Global templates are shown as the type User. If you've created custom email templates, they're also listed.
- **Details**. Preview the templates so that you can pick the one that best meets your needs. You can modify it as needed later.



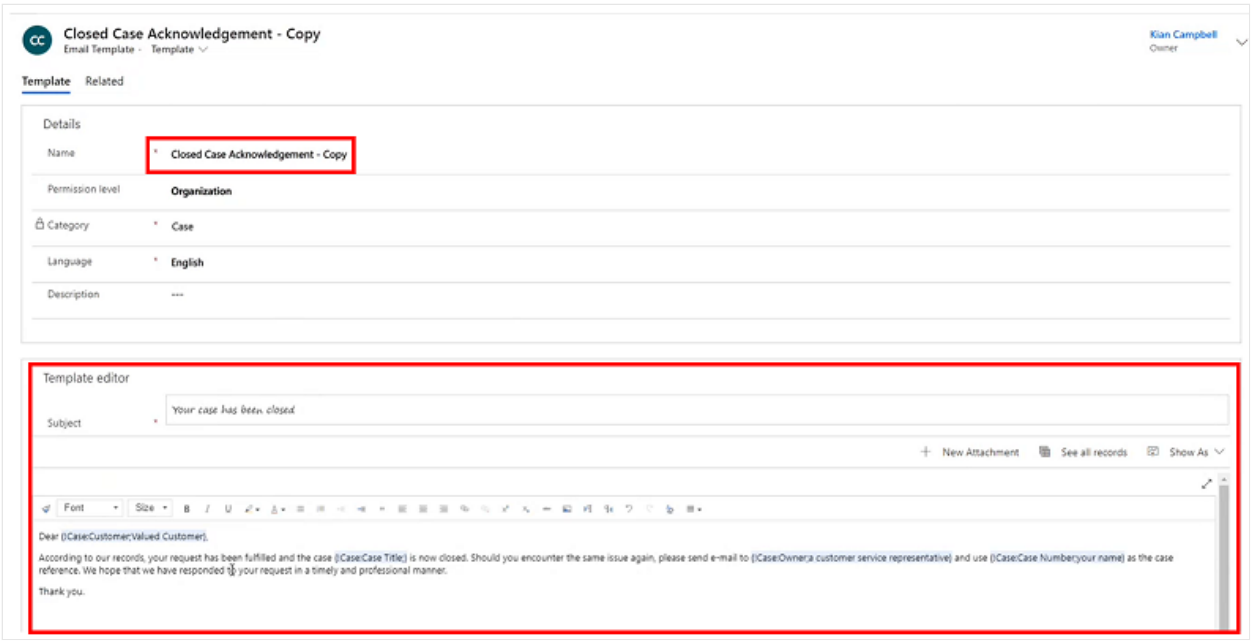
3. The template editor page is displayed.

When you create a template from an existing template, irrespective of the enhanced email template editor option setting, the app displays the newly-created email template in one of the following template editors:

- Enhanced email template: If the selected email template was created with the enhanced email template.
- Email template: If the selected template was created with the legacy email template.

> **ⓘ Important**
>
> If you create templates in the enhanced editing environment, don't edit them in the legacy web client. You'll lose any inline images and strip out some of the advanced formatting and functionality.

Work with existing templates



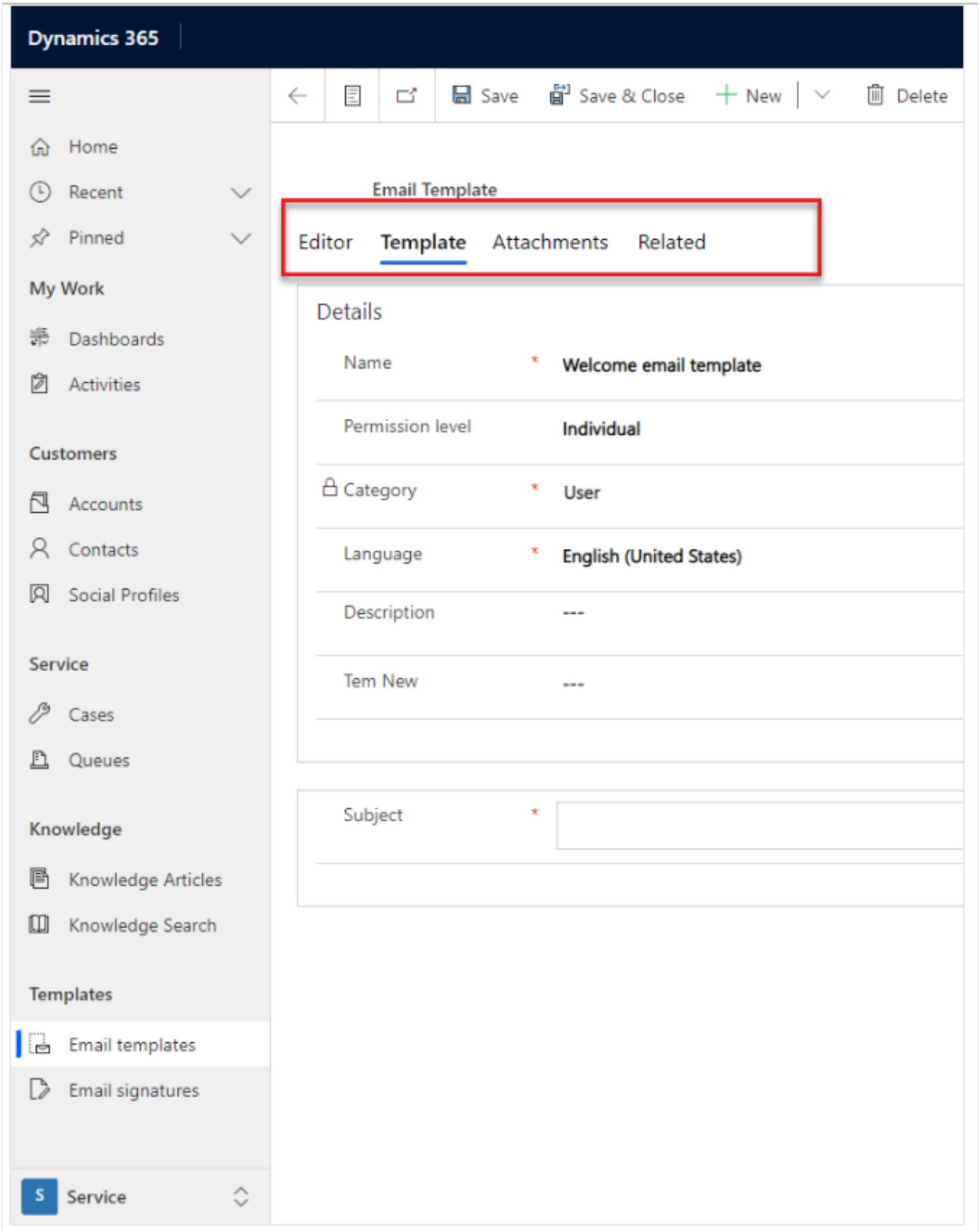
- **Template** tab: Specify or change the template details and the email subject. The name includes **– Copy** at the end to identify this template is a copy of another one.
- **Template editor** section: Design and customize the email template.
- Select **New Attachment** to add attachments to your template if needed.

Email template editor

You can use either the enhanced email template editor or the legacy email template editor to create email templates.

Enhanced email template editor

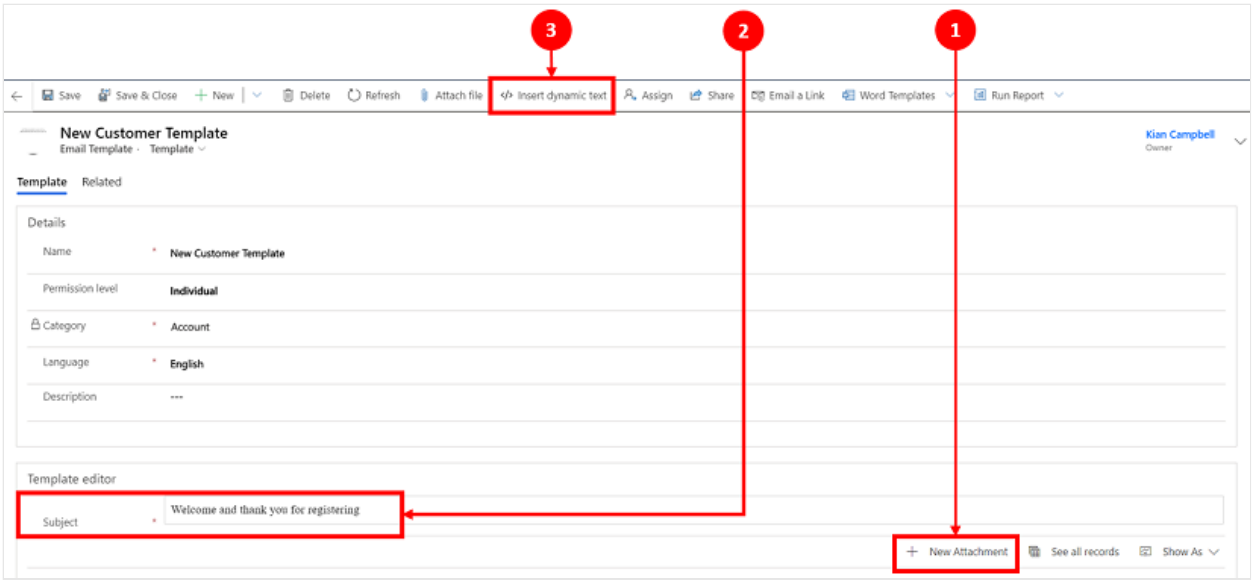
The enhanced email template editor is displayed if the enhanced email template editor option is enabled. However, for Customer Service workspace and Customer Service Hub apps, the enhanced email template editor is displayed by default. More information: Enhanced email template editor option



- **Editor** tab: Use this tab to design and customize your email template. See: Design and customize the email template.
- **Template** tab: Specify or change the template details and the email subject.
- **Attachments** tab: Add attachments to your template if needed.

Email template editor

The email template editor is displayed if the enhanced email template editor option is disabled.



1. **Insert dynamic text**: Use dynamic text in the subject and body of the email.
2. **Subject**: Enter or change the email subject.
3. **New Attachment**: Add one or more attachments to your template, if needed.

See also

Personalize content with Insert dynamic text

Set up enhanced email

Understand the email experience

Insert an email template

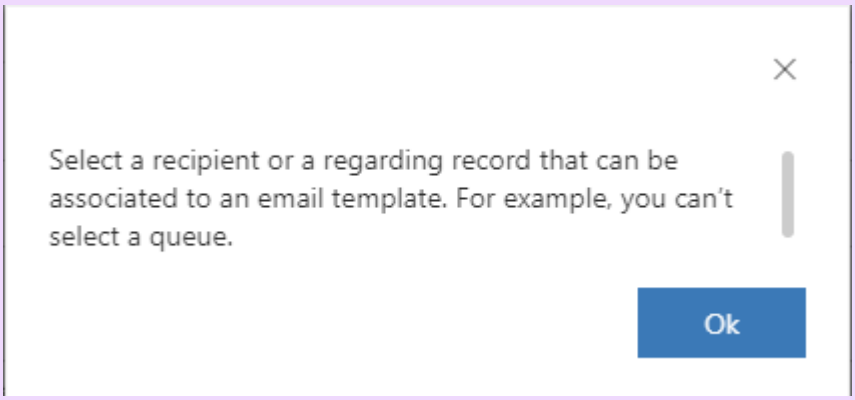
Article • 04/05/2023

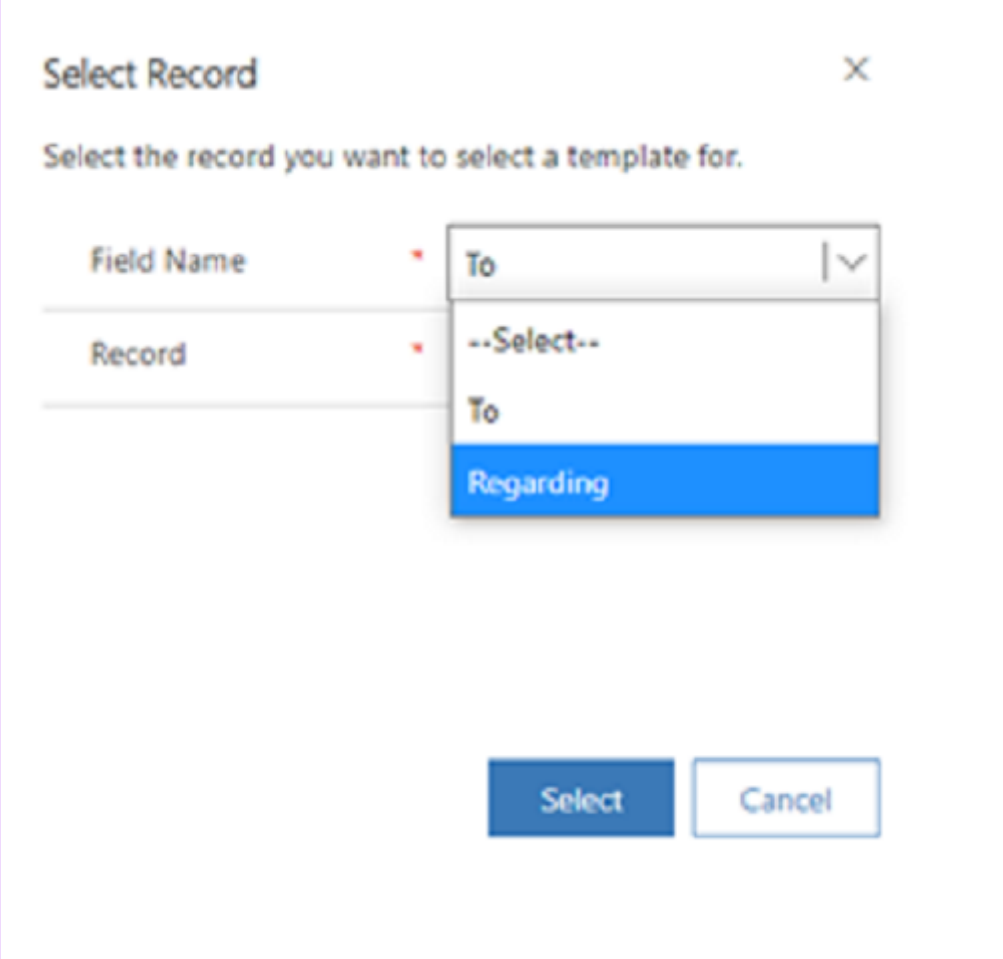
If you previously created an email template, you can easily use it as the basis for your email by inserting it into the email.

You can access the email template you created from the command bar by selecting **Insert Template**.

Insert an email template overview

After you select **Insert Template**, a window appears displaying a list of existing **Email templates** that are available to use.

> **Note**
>
> There is an intermediary window that might appear if:
>
> - You don't have either a Recipient or Regarding field for your email.
>
> 
>
>
> - You have both a Recipient and Regarding field. You must select one.



This window doesn't appear if your administrator has set **Skip Select Record dialog** in **Advanced Settings** to **Yes**. The selection of one of these fields determines which template types are shown to a user in the template selection window:

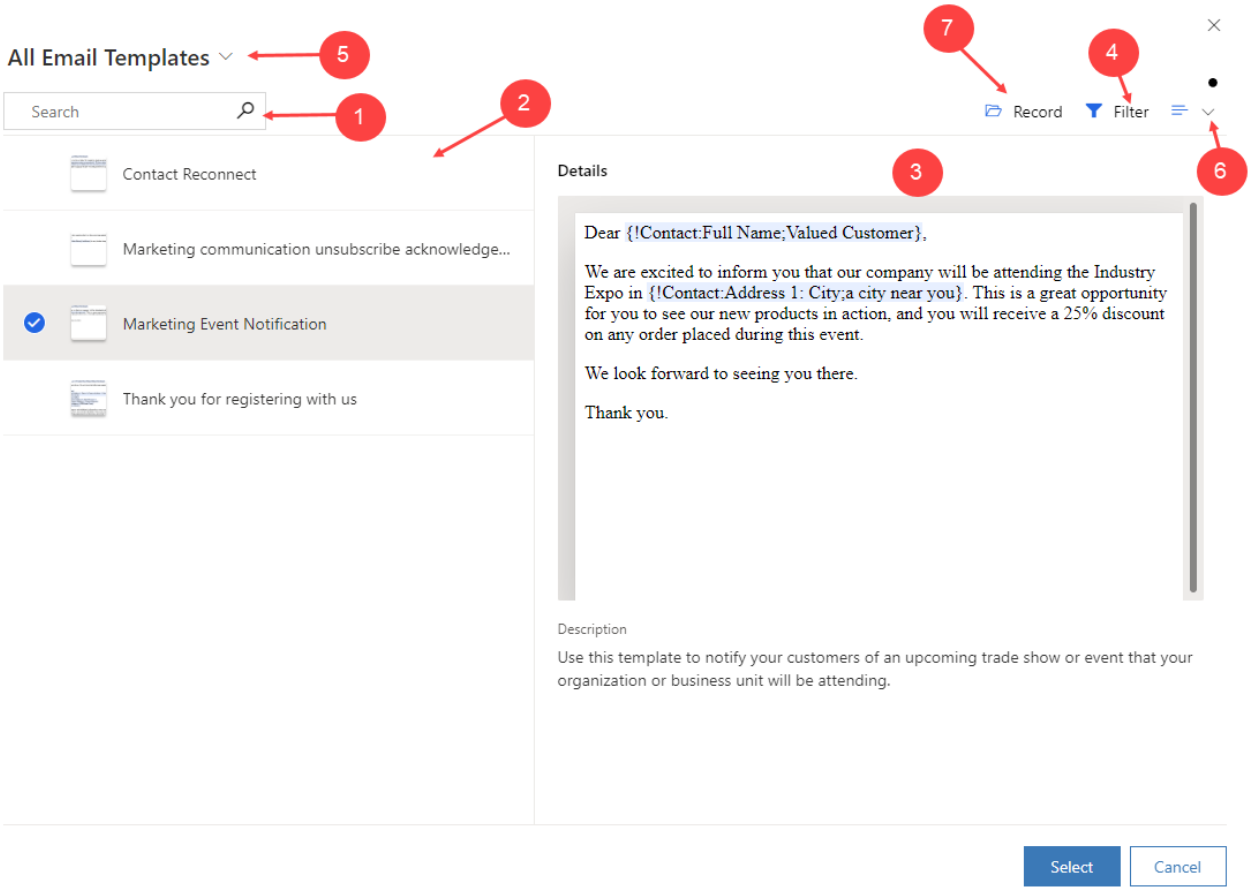
- Recipient (TO): user (global) and contact templates are displayed.
- Regarding: user (global) and templates for the regarding entity are shown.

Enhanced email template selection dialog

The application displays the enhanced email template selection window only if your admin has configured the enhanced insert template dialog option. You can perform the following actions in the enhanced email template selection window:

- Switch between email template views.
- Switch among list, tile, and grid views.
- Search for templates based on their title, subject, description, or content of the template.
- By default, you can filter templates based on standard and custom attributes, and language, if your Administrator has enabled **Language** in the **Template Gallery Filter Form**. See: Add the language filter in the email template selection view

- Additionally, if your administrator has set **Enable Email Template views** in **Advanced Settings** to **Yes**, you can filter templates based on the email template view filters.
- Zoom in to view templates on a full screen. The application provides an option to navigate between templates.



Legend

1. **Search**. Use search to find a template. You can search for templates based on name, subject, description, or content. Search doesn't support regular expressions.
2. **All templates**. Choose and browse from the templates displayed based on TO or Regarding, the filters applied, or a combination of both. You can change the view to display the templates in a grid, list, or tile view. Hover over the template tile to see the zoom option. Select the tile to open the template on a full screen.
3. **Preview**. When you select an email template, a preview of the template is displayed here. The preview shows you the content so you can pick the template that best meets your needs. After inserting an email template, you can modify the content as needed in the email editor.
4. **Filter**. You can filter templates based on standard or custom attributes.
5. **View**. Use the view to switch between email template views.
6. Use the dropdown list to switch between grid, tile, or list views. Based on your admin's settings, the application displays a specific view. More information: Customize the email.

7. **Record**. Specify the **Field Name** and **Record**. The template types shown to a user is based on what you've selected for these fields.

    - Recipient (TO): user (global) and contact templates are displayed.
    - Regarding: User (global) and templates for the regarding entity are shown. By default, **Field Name** is set to **Regarding**.

> ⓘ Note
>
> - You can see the **Record** tab and switch between email template views only if your administrator has enabled the **Enable Email Template views** and **Skip Select Record dialog**. More information: **Customize the enhanced email template selection view**
> - The enhanced email template selection view might vary based on the customizations your administrator has configured on the **Template Gallery Filter Form**, **Email Template Sorted View**, and **Template Gallery Properties Form**.
> - If you try to insert an email template on a device with a smaller screen size, you'll only see an option to search and select a template only.

Customize your email template selector filters

With the enhanced email template selector dialog, you can switch between multiple email template views. The filters set for the email template views are available on the template selector, and lets you to view only the relevant email templates. You can modify the filters set for the view, but you can't save the modified filter conditions.

For example, you have a custom view, Agent email template view, with filters set to display only the templates that have "case" in the title.

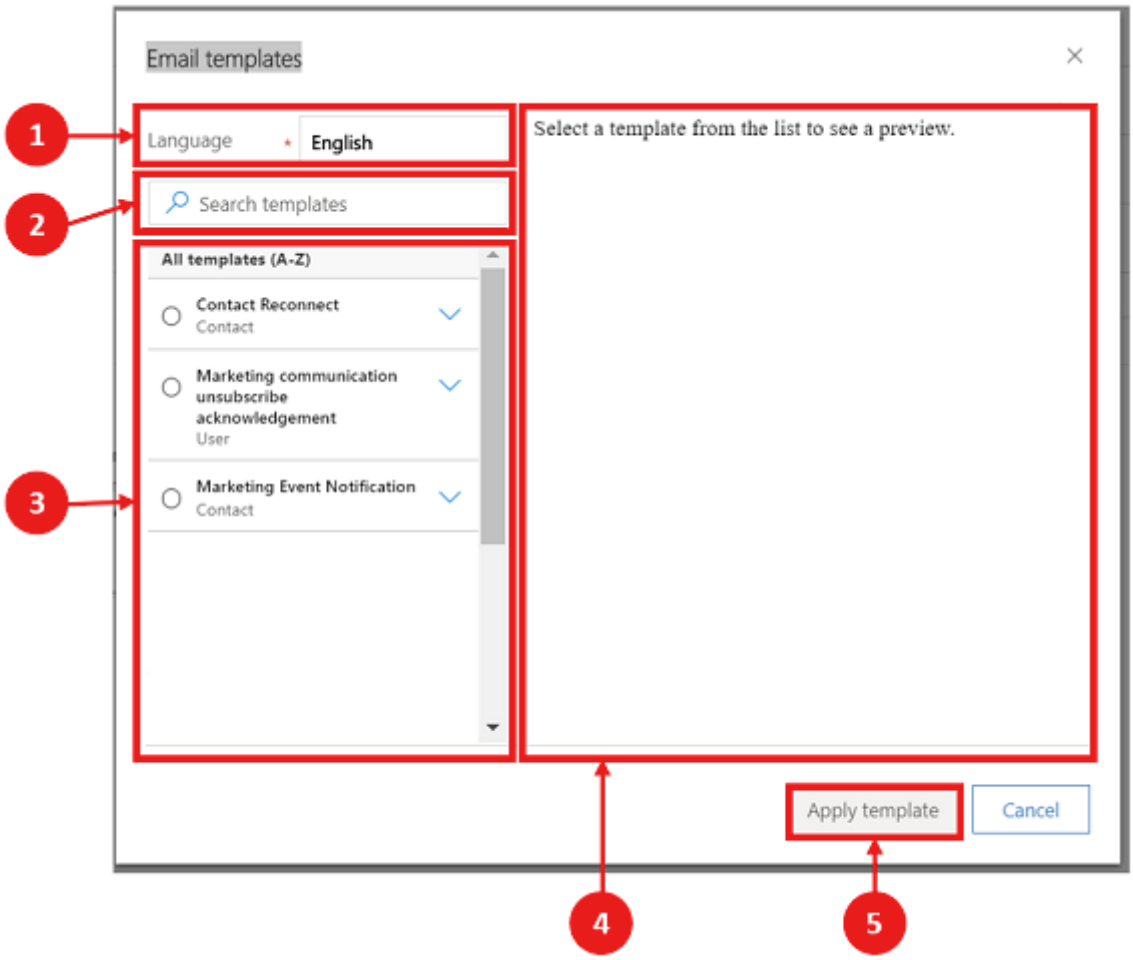
When you access the enhanced email template selector and choose Agent email template view, the application displays only the templates with "case" in the title.

> ⓘ Note
>
> The email templates that are displayed are filtered based on the specified email template view filters and record.

Email template selection dialog

You can perform the following actions on the email template selection window:

- Select a language.
- Search for templates by title.
- Modify the content for a selected template.



Legend

1. **Language**. Templates are loaded according to the selected language.
2. **Search**. Use search to find a template. Search doesn't support regular expressions and only works when using the name of that specific template.
3. **All templates**. All existing templates that have been created are displayed in this window, which you can browse and choose from.
4. **Preview**. When you select an email template, a preview of the template is displayed here. The preview shows you the content so you can pick the template that best meets your needs. After inserting an email template, you can modify the content as needed.
5. **Apply template** to insert the content to your email.

> ⓘ **Note**

If you try to insert an email template on a device with a smaller screen size, you'll only see an option to search and select a template.

See also

Set up enhanced email
Understand the email experience
Configure the enhanced insert email template

Personalize emails with dynamic text

Article • 10/02/2022

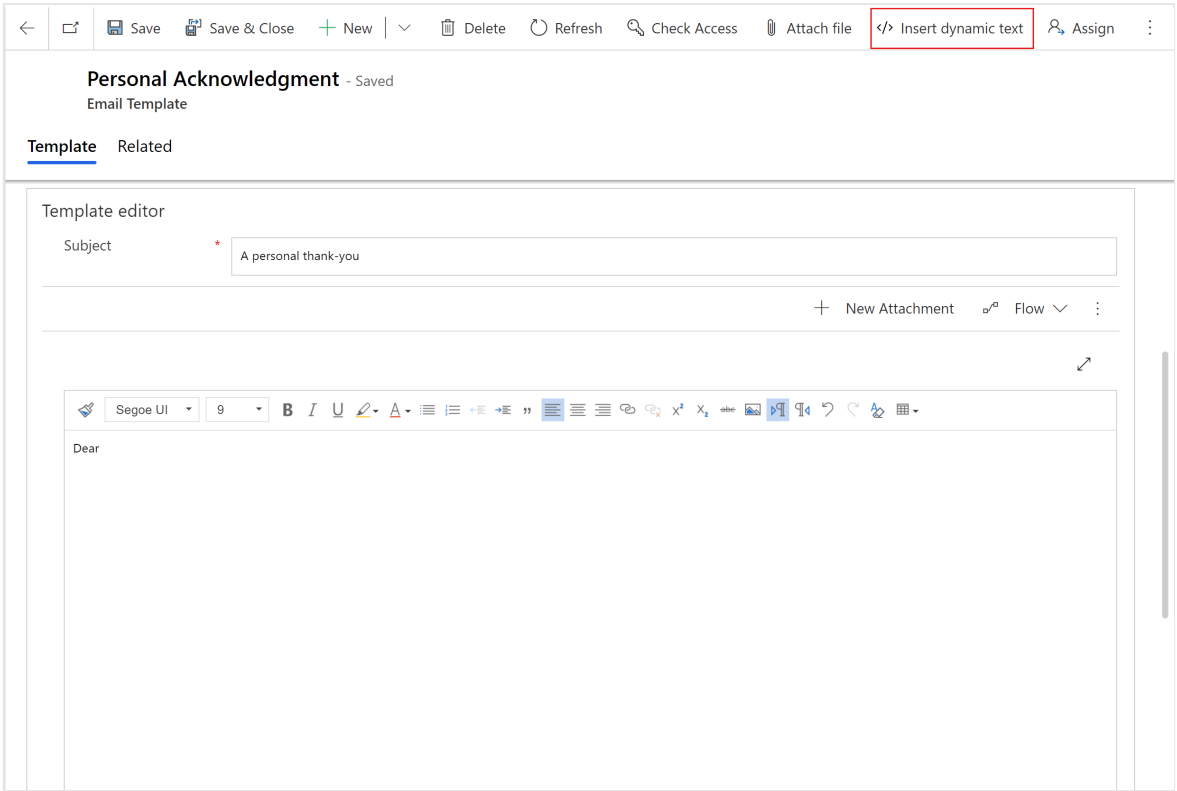
Generic greetings like "Dear customer" make customers less likely to engage with your emails. Personalize your outreach instead with dynamic text in your email templates.

Dynamic text replaces a placeholder entity with the value of the entity when you send the email. For example, your email template might contain "Dear {!User:First Name;}" but your customer sees “Dear Sal.”

Insert dynamic text

You can insert dynamic text in existing email templates or templates that you create.

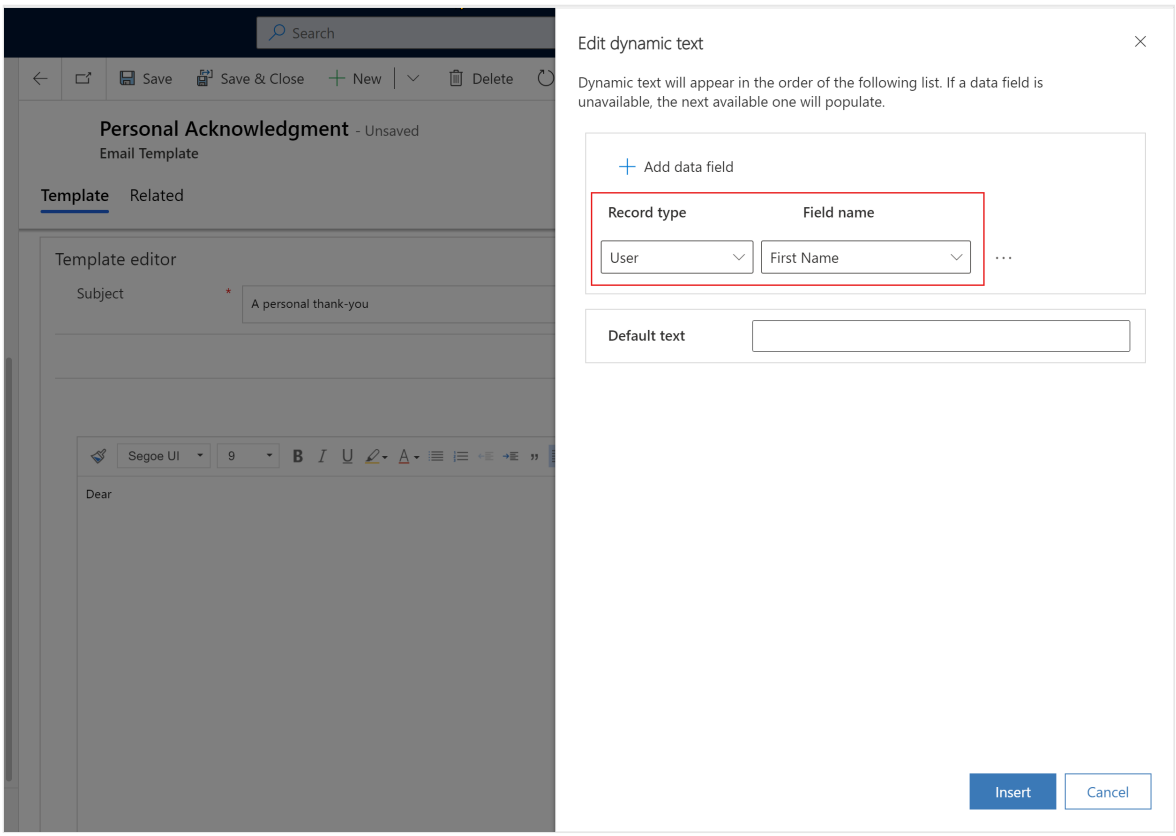
1. Select **Email Template** to edit an existing template or create a new email template.
2. On the template editor, place your cursor where you want the personalized content to appear.
3. Select **Insert dynamic text**.



4. Select the **Record type** and **Field name**.

   The category that you specified when you created the email template determines the record types you can choose. The record type you choose determines the fields

you can select.



Insert custom fields

You can insert fields from custom entities by typing them directly in your email template.

Use the following syntax:

Field Type	Syntax
• Single line of text • Currency • Multiple lines of text • Decimal number • Floating number	{!EntityLogicalName:FieldLogicalName;}
• Lookup • Multi-select option set • Option set	{!EntityLogicalName:FieldLogicalName/@name;}
Date	{!EntityLogicalName:FieldLogicalName/@date;}
Time	{!EntityLogicalName:FieldLogicalName/@time;}

For example, let's say you want to insert a custom field, *CustomerId*, that's linked to the record type *User*. Type the following placeholder in your template: `{{!User:CustomerId;}}`.

If you want to insert a custom field, *ModifiedOn*, that's linked to the record type *User*. Type the following placeholder in your template: `{{!User:ModifiedOn/@date;}}`.

See also

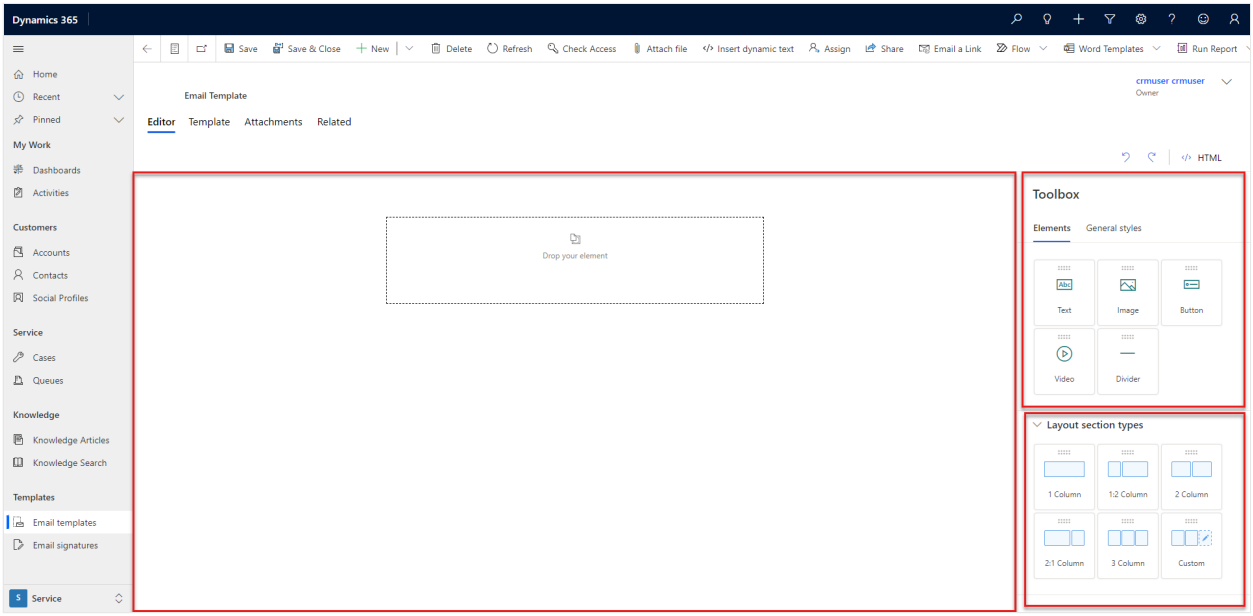
How to create an email template in model-driven apps
Enable the enhanced email template editor page

Customize an email template using the template editor

Article • 05/05/2023

Use the **Editor** tab in the **Email Template** form to create customized email templates. The **Editor** tab has three sections:

- Design canvas
- Toolbox
- Layout section types



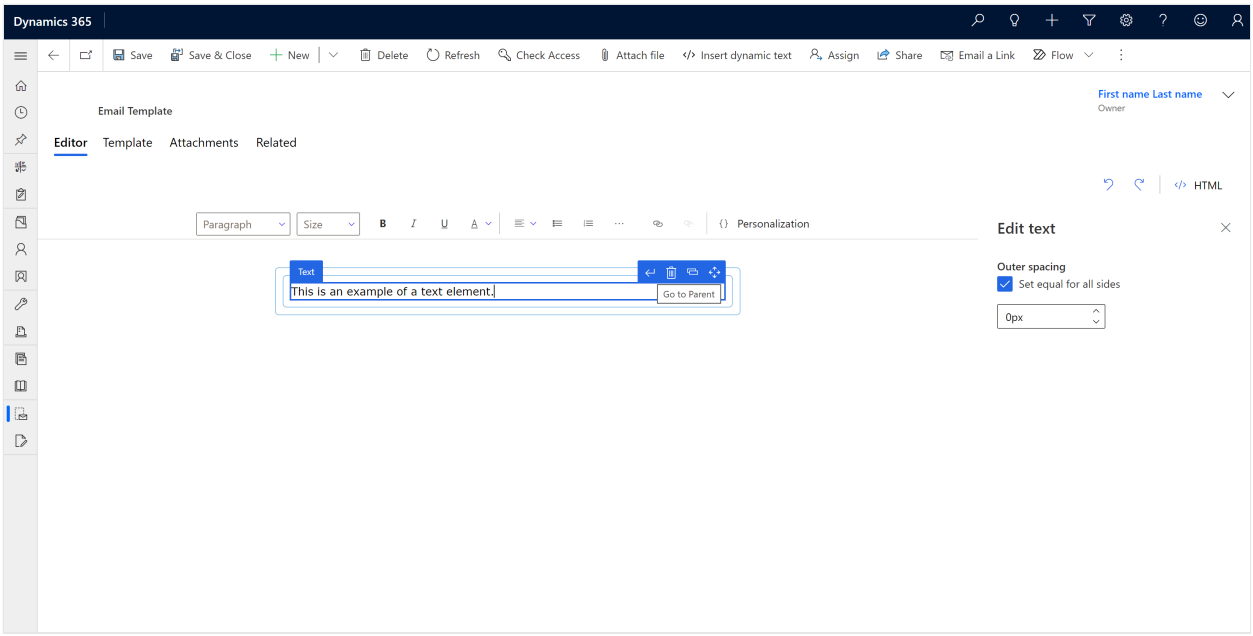
Manage an email template

On the design canvas, you can drag, arrange, enter, and delete content. By default, the canvas contains an empty one-column layout section.

You have a few different ways to add items to your template.

- Drag an element from the Toolbox to the canvas. The blue shade indicates that the element is in a suitable location and may be dropped.
- Select an element in the **Toolbox** or the **Layout section types**. An **add** icon appears on the canvas. Select the icon to add the element.

You can select **Go to the parent** to identify the section or column in which the element is embedded.



Select **HTML** to personalize your email template. We recommend the following guidelines:

- Ensure that you don't delete the existing meta tags.
- You can add CSS inside the style tags and HTML content inside the body tags.

Add a layout section to the template

Drag a layout section from the **Layout section types** box to the canvas.

To modify a layout, select it, and then select **Edit layout**. You can change a layout's spacing, style, background color, and image. You can also change the number of columns in the layout and the width of each column.

To change the appearance of a column, select it, and then select **Edit column**. You can change a column's spacing, style, background color, and image.

Add an element to the template

You can use the design elements in the **Elements** tab in the Toolbox to customize your email template:

- **Text**: Add text content to your template. Replace the placeholder text with your content. Use the floating toolbar to insert dynamic text or format the content.

  > **Note**
  >
  > When you select the text element, the following capabilities of the rich text editor toolbar aren't supported:

- Personalization. Use the Insert dynamic text editor to personalize content.
- Insert image. Use the image element to add an image to column.
- Tracking for links
- Inserting tables
- Font style and size of the text isn't detected, if you paste formatted content from other sources.

- **Image**: Add an image to your template. Select the image placeholder, and then select **Edit Image** and upload an image or specify an image URL. You can also modify the image's size and alignment.
- **Button**: Add a button to your template. Select the button, and then select **Edit Button** and enter the URL to open when the user selects the button. You can also change the label, label font, color, and appearance of the button.
- **Divider**: Divide the template into bordered sections. Select a divider, and then select **Edit Divider** and change the divider's appearance, color, width, alignment, and spacing.

Use the **General Styles** tab to change the layout's width, font, font size, background, and text color.

See also

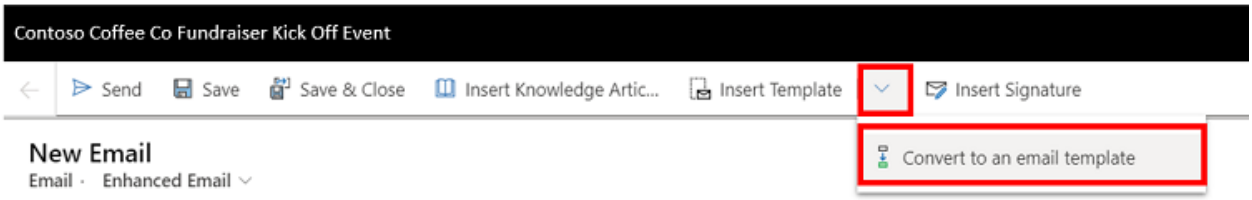
Personalize content with Insert dynamic text
How to create an email template in model-driven apps
Enable the enhanced email template editor page

Convert an email to a template

Article • 04/29/2022

When you've composed an email that you'd like to reuse with other customers, you can convert it to an email template and save it for future use.

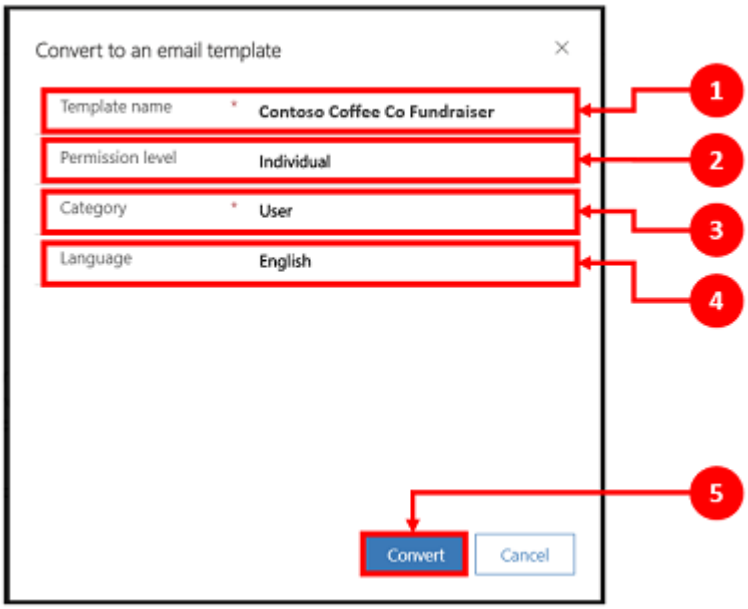
Convert an email into a template



To save an email you've composed and formatted an email message as a template, select the downward-facing caret (v) next to **Insert Template**, and then select **Convert to an email template** from the drop-down list.

Convert an email to a template overview

The following window will display with a list you can customize.



Legend

1. **Template name**. Assign your email template a detailed name you want to save for future use.
2. **Permission level**. You can share the template you create with your **Organization** or as **Individual** for personal use.

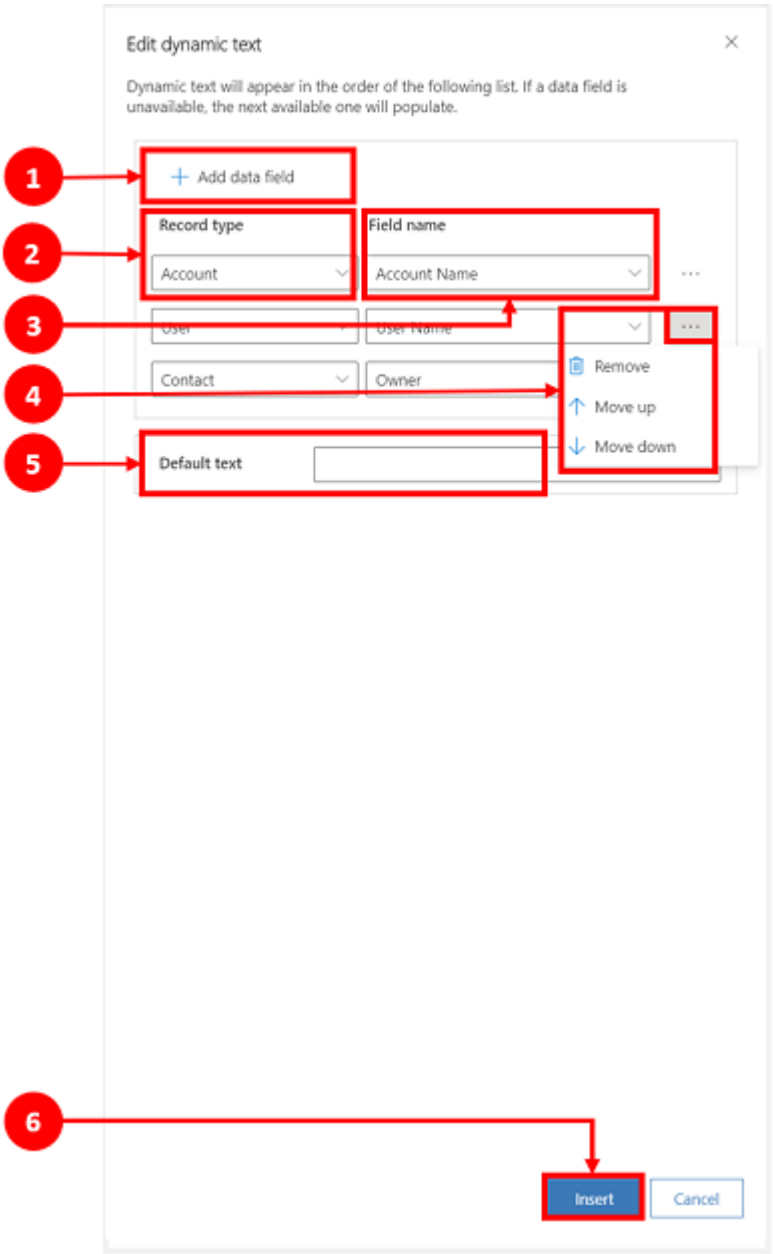
3. **Category**. The default for this field is set to **User**.
4. **Language**. You can display your installed language packs in this field. **Language** also helps to categorize your templates.
5. **Convert**. Once an email is formatted, you can convert it to an email template.

View an email template

To view a complete list of all the email templates you've created:

1. Go to the **Templates** section on the left-hand pane.
2. Select **Email templates** A list of **All Email Templates** is displayed, which you can edit and update.

Insert dynamic text in an email template form



Legend

1. **Add data fields**. When you add data fields, the template adds **Record type** and **Field name** fields below. You can add as many data fields you want.
2. **Record type**. You can then customize the record types. Default is set to account.
3. **Field name**. You can customize the field names. Default is set to account name.
4. **More Commands**. The **More commands** icon allows you to edit the order of the record types using the **Move Up** or **Move down** functionality to align records in a customized order.
5. **Default text**. Allows you to select the style of text for the subject and body of your email template. If no text is selected, it will display using the default text.
6. **Insert**. When done this command inserts and saves your form.

> ⓘ **Note**
>
> If you click in an area on the form that does not support dynamic text, it displays **Unable to insert**.

For more information on creating email templates and configurations, see Create templates for email.

Create a signature for emails

Article • 04/10/2023

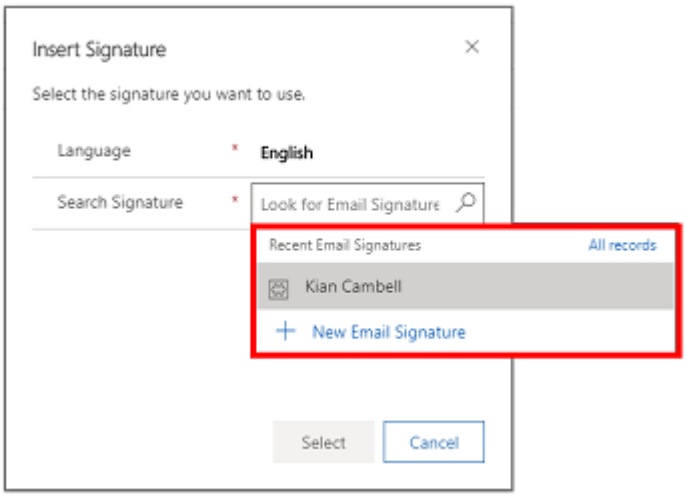
Email signatures are an important and valuable tool for users. Email signatures are like electronic business cards you include when you send an email, and can promote professional branding for your company.

Add text to an email signature

Adding an email signature is easy and can be done at any point while you are composing an email. You can either add an email signature with static or dynamic text. Dynamic placeholders are used to define dynamic text. The placeholders are replaced with the corresponding values of the email's sender, specified in the **From** field.

Add an email signature

- On the command bar, select **Insert Signature**.
- From the drop-down list, select an existing signature or select **New Email Signature**.



Based on the email's sender specified in the **From** field, one of the following actions occur:

- If the sender is a user, the dynamic placeholders defined in the email signature template are replaced with the values corresponding to the user.
- If the sender is set to a queue and the queue's owner is a user, the dynamic placeholders defined in the email signature template are replaced with the values corresponding to the queue's owner.
- If the sender is set to a queue and the queue's owner is a team, the dynamic placeholders are replaced with the values corresponding to the team's

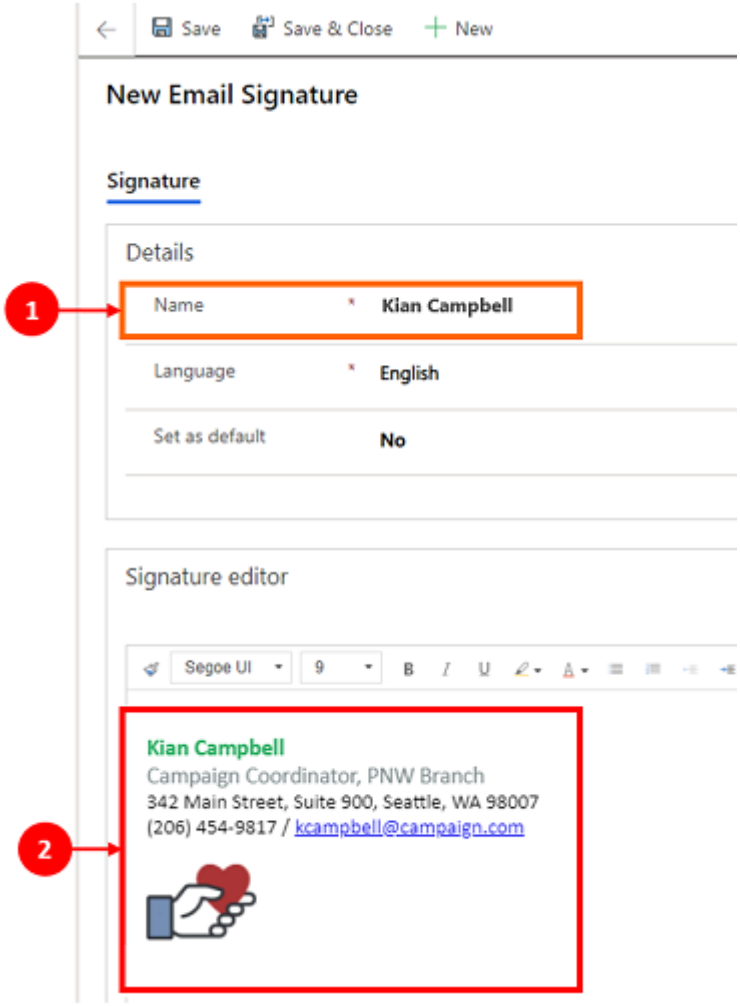
administrator.

Create an email signature

You can quickly create an email signature at any point while you are composing an email.

Create a new email signature

You can add a new email signature by:



1. **Details** in this section, enter the name of the email signature.
2. **Signature editor**. This allows you to create your email signature and **Save** when finished.

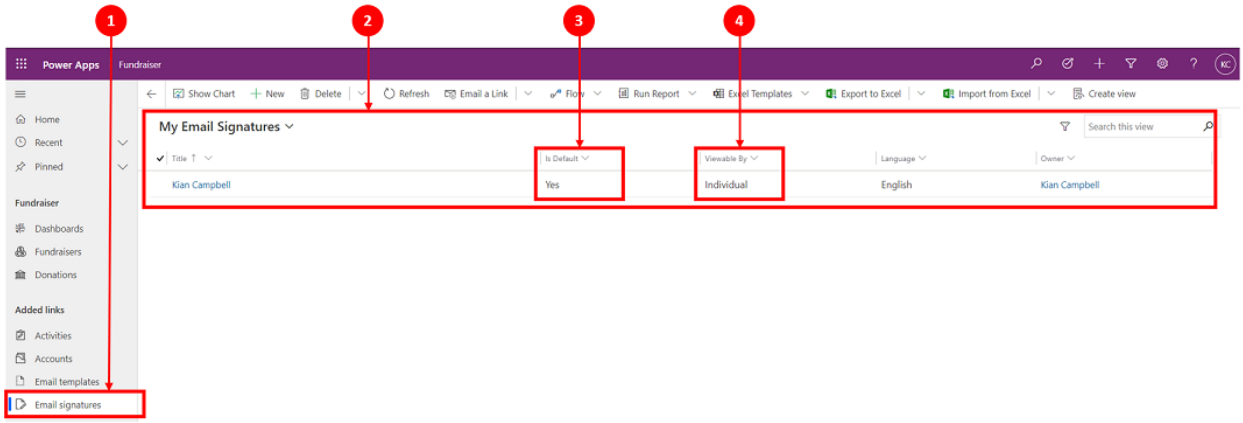
> ⓘ Note
>
> - You can include inline images, such as a business logo, in email signatures, as long as they are under 1 MB in size. However, the inline

image might not render properly if you open the email in the Outlook Desktop app.

- You can add only those fields as dynamic placeholders that are linked to the **Record type** user.
- Signatures can also be created and used for queues.

Manage email signature lists

You can view and manage email signatures you have created to make edits, change default, and who can view your signatures.

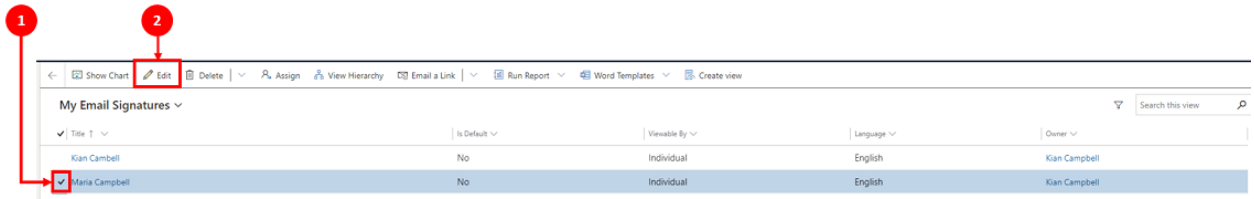


Legend

1. Under **Templates** select **Email signatures**.
2. **My Email Signatures** list displays, showing all your email signatures you can edit and update.
3. You can select a default signature for email. Only one signature per user can be set as **Is Default**.
4. Email signatures can only be **Viewable By** the individual user.

Change the default email signature setting

While you can create multiple email signatures depending on your needs, only one can be set as your default email.



To change your default email signature setting:

1. Select the email signature you want to set as default. This will change the command bar to display **Edit**.
2. Select **Edit**. A new page opens, where you can update the email default setting. While you are on this page, you can also delete one or multiple email signatures just by selecting them.

Email FAQs and known issues

Article • 02/15/2022

Find answers to common questions regarding the email experience features and functionality, configurations, and other key concepts.

Email content is lost after entering text in the body of the message

Issue: Recent content added to the email may get lost if you enter text in the body of an email and immediately select **Save**, **Save and Close**, or **Send**.

Resolution: To avoid this issue, wait a few seconds before you select **Save**, **Save and Close**, or **Send** after you enter text in the body of the email.

The From column is read only or lookup isn't working

Issue: The **From** column in an email form is read-only or you can't look up rows and filter results by **User** or **Queue**.

Resolution: This happens when customization specifically have been applied on this column by your system administrator. To fix the issue, open a browser window and run the following two commands replacing the **environment URL** with the URL of your environment.

- (replace with your environment URL)/api/data/v9.1/RemoveActiveCustomizations(SolutionComponentName='AttributeLookupValue',ComponentId=(25E9AF0C-2341-DB11-898A-0007E9E17EBD))
- (replace with your environment URL)/api/data/v9.1/RemoveActiveCustomizations(SolutionComponentName='AttributeLookupValue',ComponentId=(26E9AF0C-2341-DB11-898A-0007E9E17EBD))

To find the URL, in the address bar the first part of the URL that starts with **https://** and ends with **.com** is your environment URL. For more information on how to find the environment URL, see Get the environment UR.

I've enabled an email form but it doesn't display.

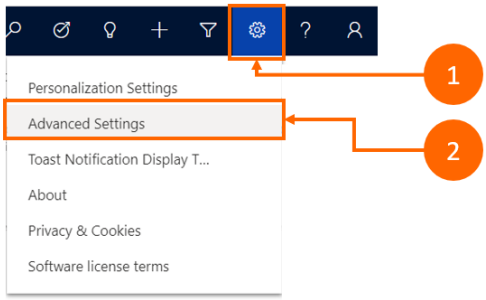
If you've enabled an email form but it is doesn't display, you'll need to enable it in the **App Designer** by doing the following:

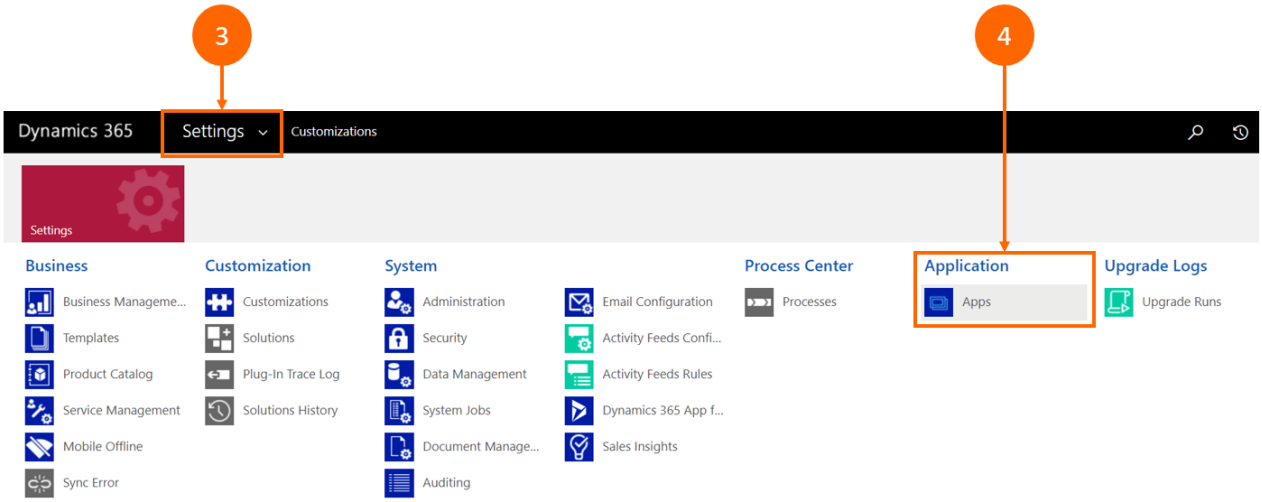
1. Go to **Settings** > **Advanced Settings**.
2. Select **Settings**.
3. In **Application** settings, select **Apps*.
4. Select ⋮ **More Options** on **Customer Service Hub**.
5. On the **App Designer** drop-down menu, select **Open**.
6. On the site map, select the edit feature.
7. Under the **Email** form selector, select the drop-down menu to display the **Email** forms you have enabled.

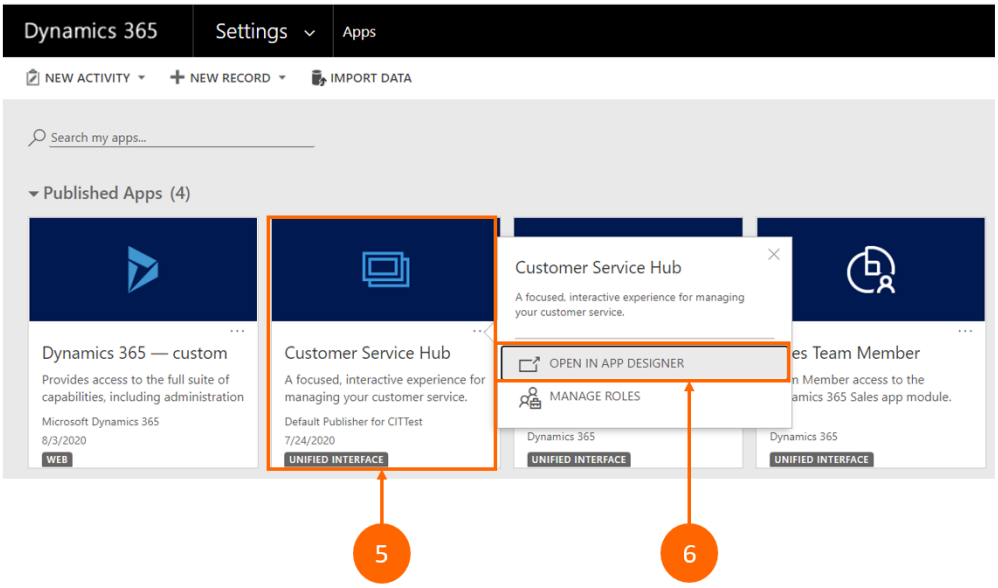
If the form isn't displayed in the list, it hasn't been enabled.

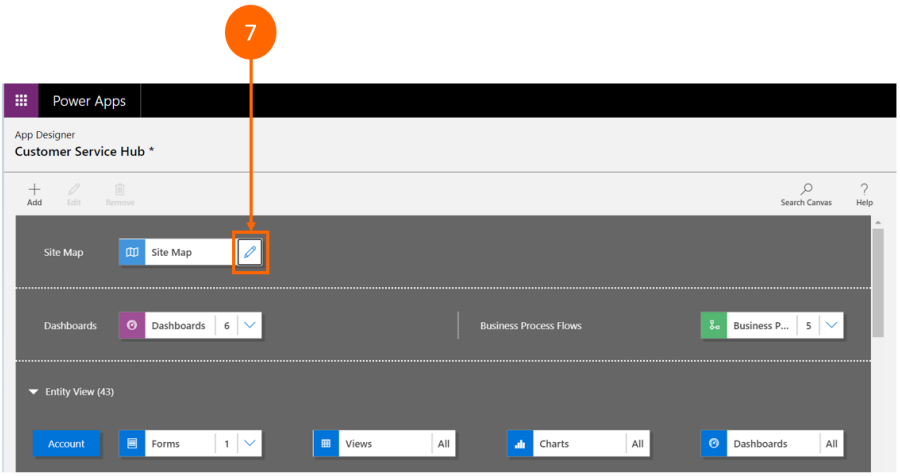
8. To enable a form, go to **Main Forms** and select the form.

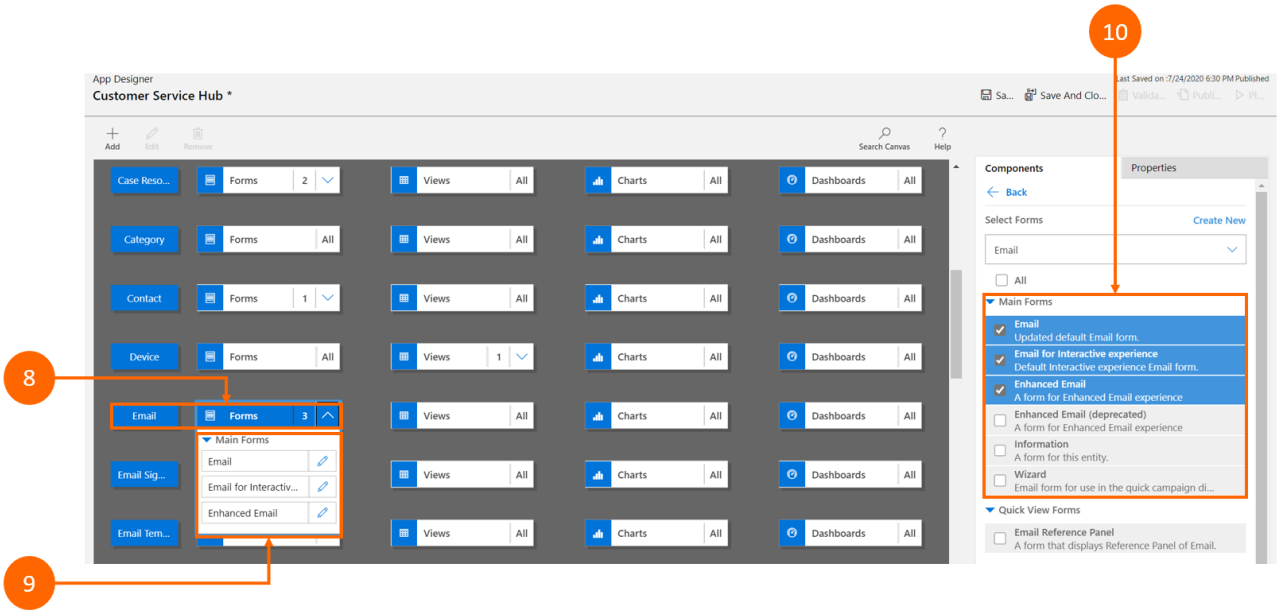
> **Note**
>
> You can't change the display order under **Main Form**. You must go back to the **Form Order** to change the display order.











9. Add the email template and signature link to the site navigation by going to the site map and doing the following:

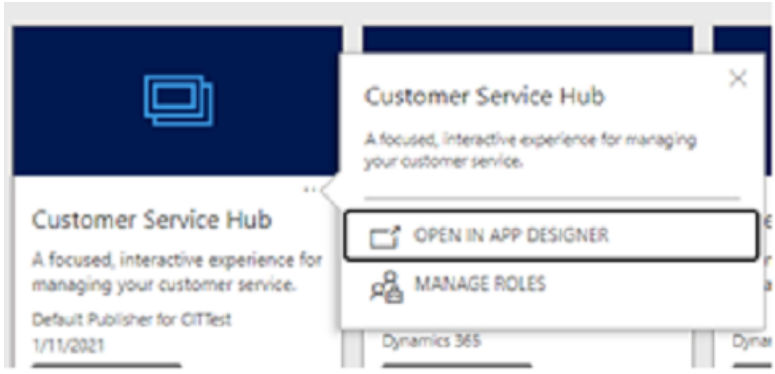
   a. Go to **Settings** > **Advanced Settings**.

   b. Select **Settings**.

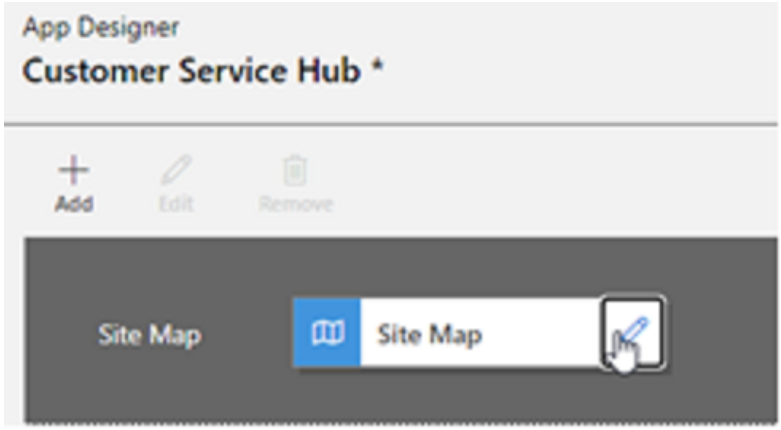
   c. In **Application settings**, select **App*.

   d. Select **More Options** on the **Customer Service Hub** tile.

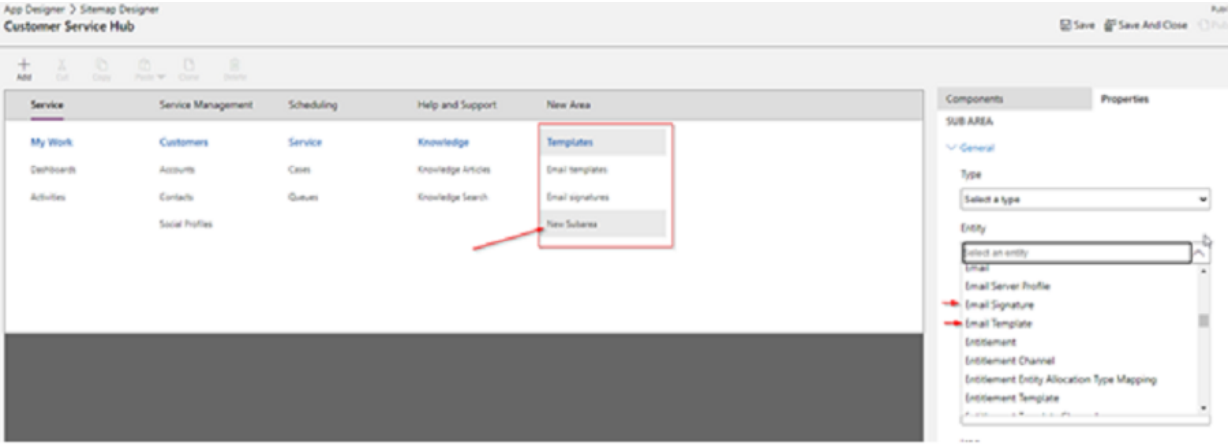
   e. Select **OPEN IN APP DESIGNER**.



f. Select the pencil icon to edit.



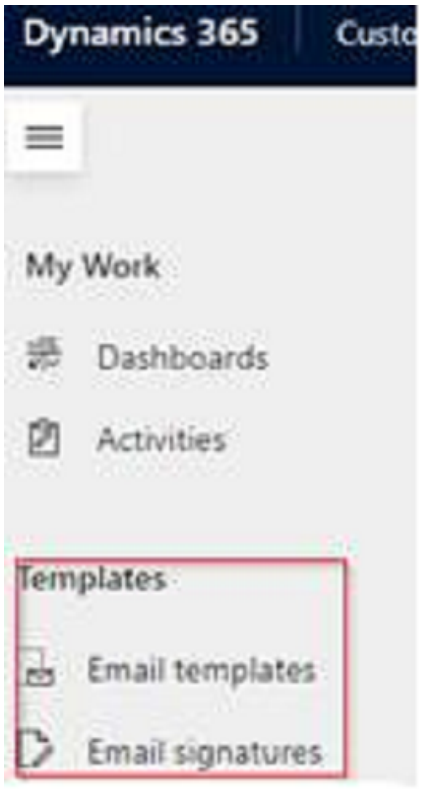
g. When the site map opens, create a new group for templates by selecting **New subarea**.



h. Select **email templates** or **email signature**.

i. Add a title. (This is the name that will show instead of **New subarea** when saved.)

j. Save and publish. A link is added to the site map.


Dynamics 365
My Work
Dashboards
Activities
Templates
Email templates
Email signatures

Configure the inbox

Article • 10/03/2023

As an administrator, you can configure the inbox setting so that when your agents open Customer Service workspace or Omnichannel for Customer Service, they can select the inbox icon to show all the cases and conversations that are assigned to them. The inbox is designed to help agents efficiently work on high velocity tasks, and promote inbox sessions to regular sessions when they need more time to resolve cases and complete their conversations.

You can configure the inbox settings for custom experiences only.

You can also configure and enable the inbox in app profile manager.

The following channels are supported in the inbox:

- Live chat
- Asynchronous chat
- Case
- Email
- Voice

The following asynchronized channels are available in the conversation inbox.

- SMS
- Persistent chat
- Facebook
- WeChat
- LINE
- WhatsApp
- Teams

Live chat and voice channel in inbox

The following are things to note about live conversation settings in the inbox:

- When an agent accepts a live work item, that item is then added to the relevant view in the inbox, whether or not the agent is using the inbox at the time of the live work item.
- Voice calls always open as a new session with the card added to the inbox for awareness.
- Live work item cards have a "live" visual indicator.

- Live work item unread counts accrue to the unread count on the view.

Configure the inbox setting for agents

You can configure the inbox in the Customer Service admin center by editing the agent experience profile to meet your preferred inbox settings.

1. Open the Customer Service admin center app.
2. In **Agent experience**, select **Workspaces**.
3. In **Agent experience profiles**, select **Manage**.
4. Select the profile for which you want to configure the inbox.

   > ⓘ **Note**
   >
   > Channel providers must have **All active channels** set to **On** to use and configure the chat setting in the inbox.

5. In **Inbox**, select the **Settings** icon, and then toggle **Inbox** to on.
6. You can either modify an existing view or create a new one by selecting **Edit**. The following fields can be configured:

   - **Name:** Specify a name that shows in the inbox. Alphanumeric values are valid names.
   - **Record Type:** Select the record types for which the settings need to be applied. You can select more than one record type.
   - **Chat Status**: Is available if you select the record type as chat. Select one or more of the following settings:
     - **Assigned**
     - **Unassigned**
     - **Resolved**
   - **Email**: Is available if you select the record type as Email. Select all the options that you want to enable.
     - Assigned to me:
       - Emails sent to me
       - Emails assigned to me
     - Unassigned:
       - Emails in my team
       - Emails in my queue(s)

    - Emails in a shared mailbox
- **Agent Visibility**: Select one of the following options to show or hide the view to agents:
    - **Show**
    - **Hide**

Preconfigured inbox views

The following views are supported out of the box in the inbox:

- **Cases**: Shows all cases that the user owns, including active and resolved cases.
- **Assigned Conversations**: Shows all conversations that have been assigned to the user, including active and closed conversations.
- **Resolved Conversations**: Shows all conversations that have been marked as closed, and where the user was the primary agent in the conversation.
- **Unassigned Conversations**: Shows all active conversations and emails in a team or queue in which the user is a member. The user is able to assign conversations to themselves and reply to emails directly from this view.

Inbox views are refreshed every five minutes. Agents can manually refresh the view by using the **Refresh** icon.

Configure custom views for the inbox

You can configure a customized view for the inbox so that agents can see their cases, conversations, emails, and voicemails all in a single view.

To configure multiple views for the inbox, complete the following steps.

1. Go to the agent experience profile for which you want to configure a custom view.

2. On the **Inbox** card, select **Edit**. The **Inbox** page is displayed.

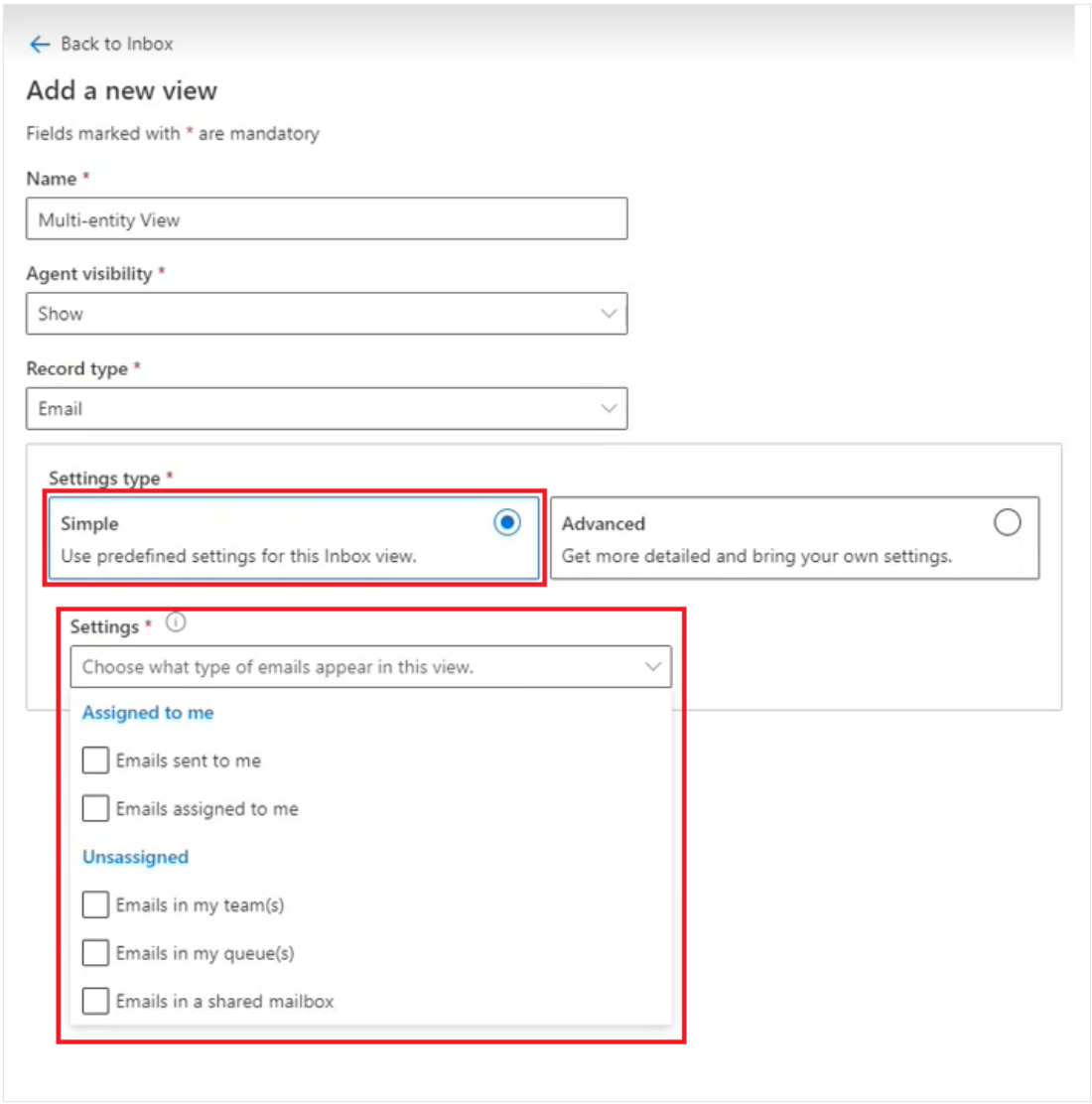
3. Toggle **Enable Inbox** to **On** if it isn't already on, and then select **+ Add**. The **Add a new view** page is displayed.

4. On the **Add a new view** page, enter the following details:

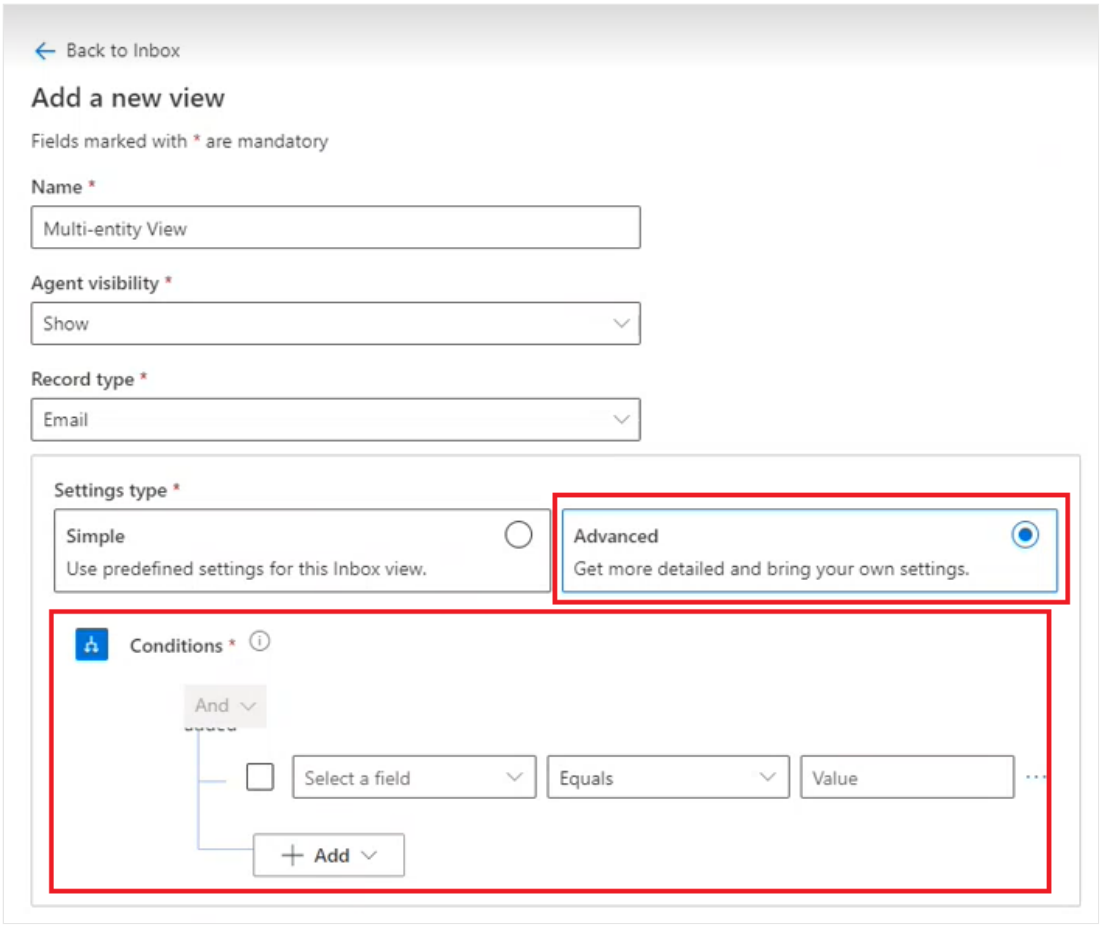
    - **Name**: Type a name for the view.
    - **Agent visibility**: Select whether to **Show** or **Hide** the view from agents.
    - **Record type**: Select the records that you want to include in the multi-entity view.

5. For each record type, choose one of the following settings. The settings are different for each record type.

   - **Simple** opens a dropdown menu where you can choose the type of records that appears in your multi-entity view. More information: Simple settings



   - **Advanced** opens a **Conditions** option where you can set the desired conditions for your multi-entity view. More information: Advanced condition builder



6. Select **Save**.

Simple settings

The following simple settings are available out of the box for the record types.

Record type	Simple settings
Email	- Emails sent to me - Emails assigned to me - Emails in my team(s) - Emails in my queue(s) - Emails in a shared mailbox
Chat	- Assigned - Unassigned - Resolved
Case	- Cases assigned to me - Cases in my team(s) - Case(s) in my queue(s)
Voicemail	- Assigned - Unassigned - Resolved

Real-time translation

For information about how to configure real-time translation for conversations in the inbox, see Enable real-time translation of conversations

See also

Create and use agent experience profiles
Overview of agent experience profiles
Use the inbox
Configure voicemail to manage inbound calls

Use the inbox

Article • 10/03/2023

The inbox in Customer Service workspace gives you quick view of your assigned cases and conversations. It's designed to be your central place to locate, manage, and complete your day-to-day work. It can help you efficiently work on high velocity tasks, and promote inbox sessions to regular sessions when you need more time to resolve cases and finish your conversations.

The view you see in your inbox depends on how your administrator has configured it. More information: Configure the inbox.

Depending on how your inbox configured, you may see any of the following channels:

- Live chat
- Asynchronous chat
- Case
- Email
- Voice

View the inbox

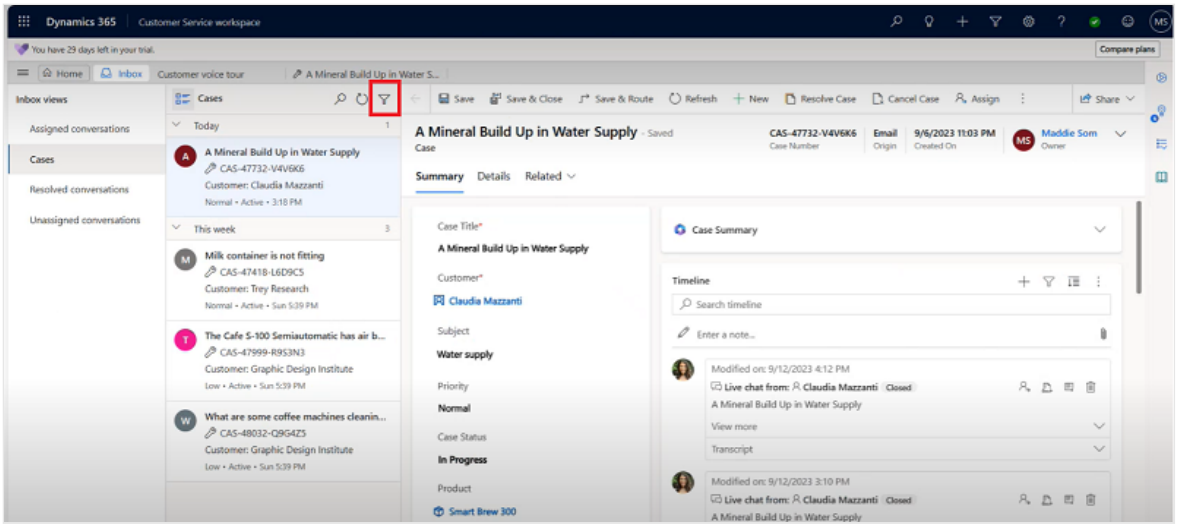
1. In Customer Service workspace, select **Inbox** on the sitemap.
2. Select either **Cases** or **Conversations** to view a respective list of assigned items.
3. Select the item to work on. It opens in a new tab. Alternatively, you can open an item in a new tab by selecting the **new session** icon.

Filter your inbox views

You can use filters to show only the items you want in your inbox.

To filter your inbox view:

1. In the inbox, select the **Filter** icon.



2. Select the desired filter views. The following options are available:

   - **Filter**
     - **All** - Displays both read and unread items.
     - **Unread** - Displays only unopened items.
     - **Read** - Displays only opened items.
   - **Sort by**
     - **Customer** - Displays items based on the customer record.
     - **Date** - Displays items based on the date they were created.
   - **Sort order**
     - **Oldest on top** - Displays oldest items first in the inbox.
     - **Latest on top** - Displays most recent items first in the inbox.

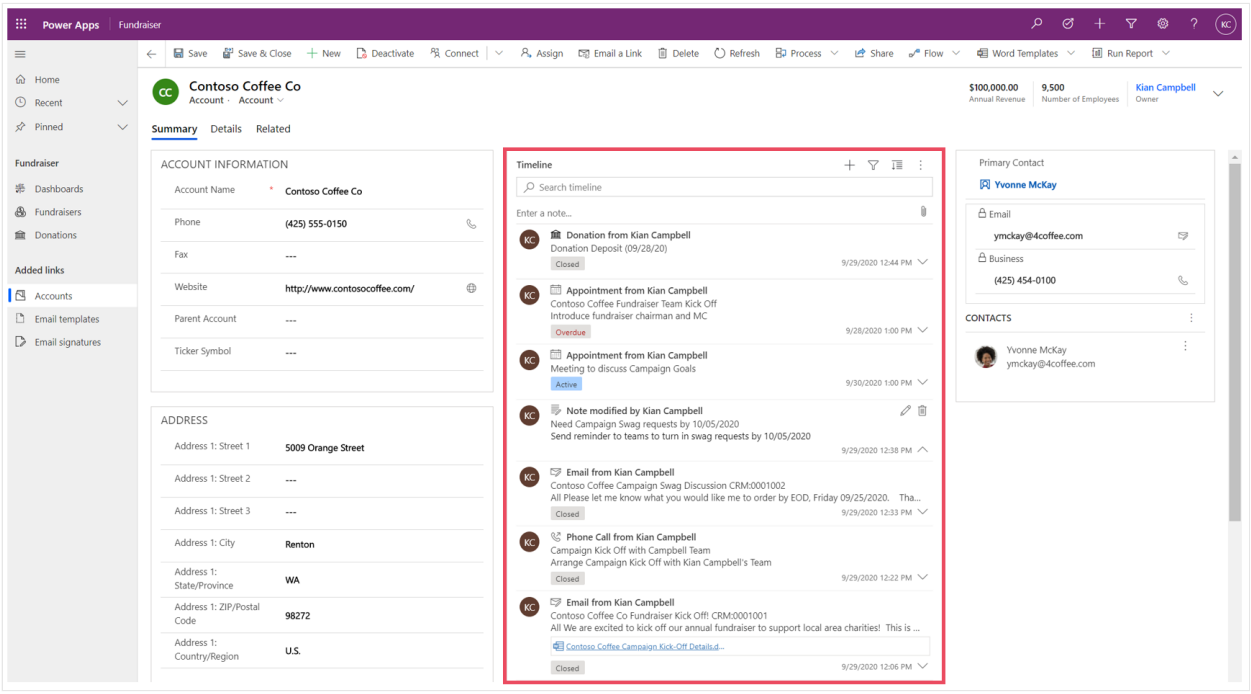
See also

Configure the inbox
Get started with Customer Service workspace

Set up the timeline control

Article • 10/05/2023

The timeline helps app users see all activity history. The timeline control is used to capture activities like notes, appointments, emails, phone calls, and tasks to ensure that all interactions with the related table are tracked and visible over time. Use the timeline to quickly catch up on all of the latest activity details.



The timeline control provides an easy way to view information related to a table, such as accounts or contacts. This immersive experience helps give users a better understanding of their customer interactions, and helps them deliver more personalized service in an efficient and effective manner.

App makers can configure the information that's displayed on the timeline to help users access information and create new activity records, such as email and tasks, directly from the timeline quickly so they can deliver more personalized service.

Add a timeline

A timeline control is located on a form within a table. Any timeline control that's on a form can be configured. For example, an account table has three standard forms, and each of those forms can have a timeline that can be configured.

Display a custom table in a timeline

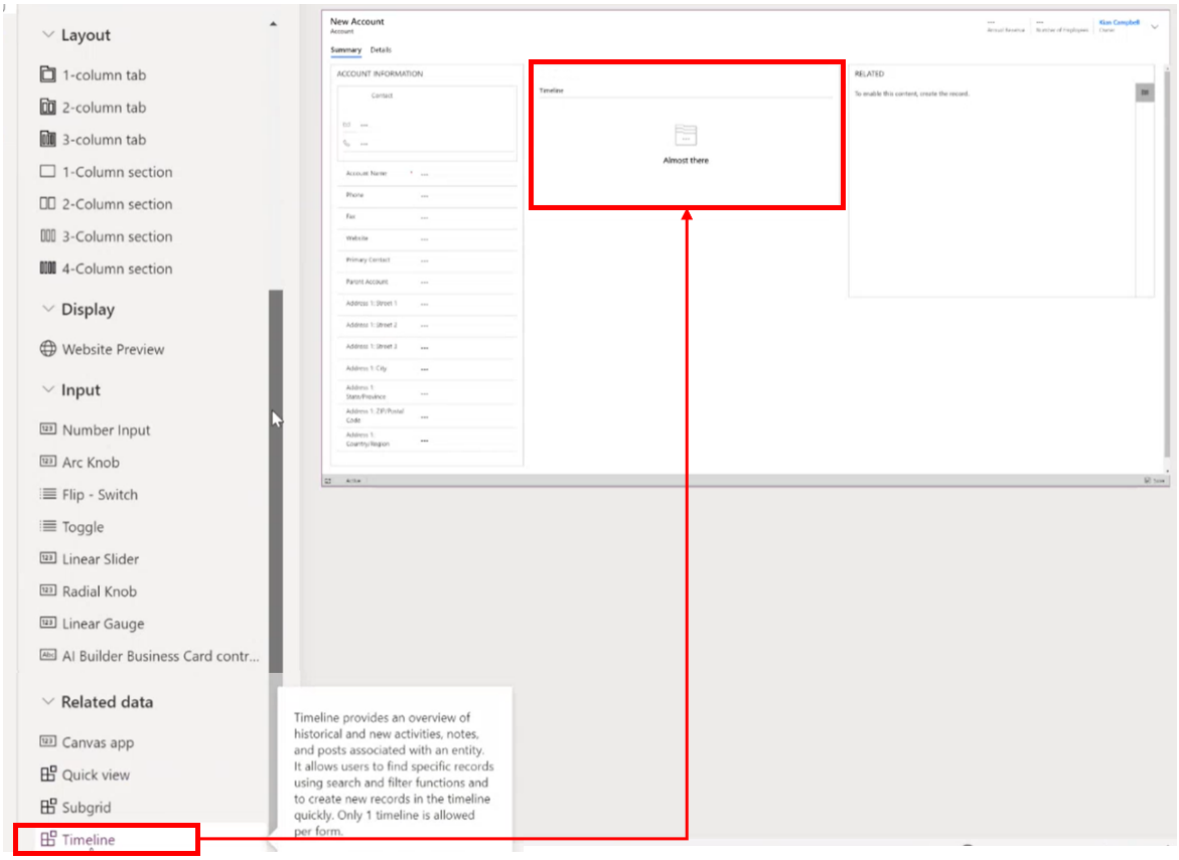
For custom tables to appear in the list of activities that can be added to a timeline control, make sure that when you create the table you configure the following settings:

- Set the table **Type** as **Activity**.
- Check the **Enable attachments** setting if you want app users to be able to add attachments and notes to the custom activity record.

More information: Create a custom table

Add the timeline component to a form

1. Sign in to Power Apps.
2. Select **Tables** on the left navigation pane, and then open the table you want. If the item isn't in the left navigation pane, select ...More and then select the item you want.
3. Select the **Forms** area, and then open the form where you want to add or configure a timeline.
4. In the form designer, select **Components** from the left navigation, and then scroll down to the **Timeline** component on the left side. Drag and drop it into a section on the form.



5. Make the changes you want to the timeline settings. More information: Configure the timeline component
6. Before you can view any configuration changes on the table form, you must save and publish your updates on the timeline component. Select **Save**, and then select

Publish to make your form changes available on the table form for the environment.

Note the following when you work with the timeline control in the form designer.

- You can add multiple timelines to a form.
- To remove the timeline component from a form, select the **Timeline** component area, and then press the Delete key.
- Since the timeline component relies exclusively on underlying related data, **Almost there** is displayed in the timeline section.
- Because you are in a create and/or edit state on the form, there's no underlying data, so the timeline section is blank in the form designer.

Configure the timeline component

The timeline component is rich in features and functionality that can be configured and tailored to support specific business needs. The timeline is composed of features and functionality that you configure in the timeline component, which is then displayed in the table form.

Display options

This section describes the settings available in the Display options area of the timeline control settings.

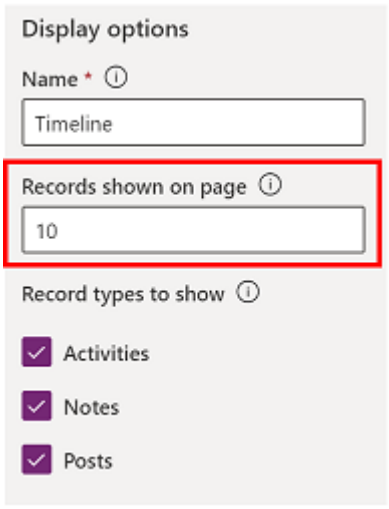
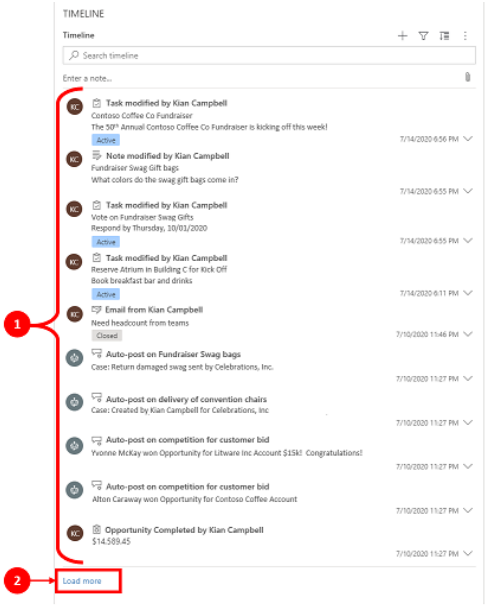
Timeline component name

The **Name** column under the **Properties** tab in **Display options** is the unique name of the timeline control and is only used by the app maker to reference.

> ⓘ Note
>
> - The **Name** column has limitations. For example, you can't use spaces between words. Instead, you must use an underscore (_)
> - You can't change the default heading label that is displayed as **Timeline** on the form during app runtime.

Records shown on page

This section allows you to control the number of records that appear before displaying **Load more** at the bottom of the section.

Form designer configuration View	Form designer display View
	
The default setting on the **Records shown on page** column is set to 10 records, but you can change it to display up to 50 records.	1. Per the default setting shown in this example, the form displays a maximum of 10 records. 2. Once records exceed 10, the **Load more** option appears at the bottom of the form.

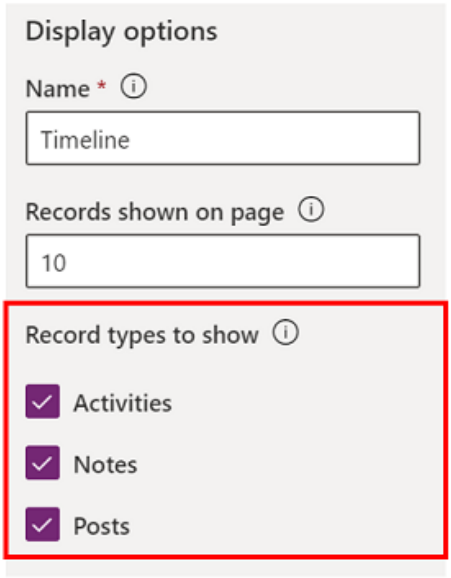
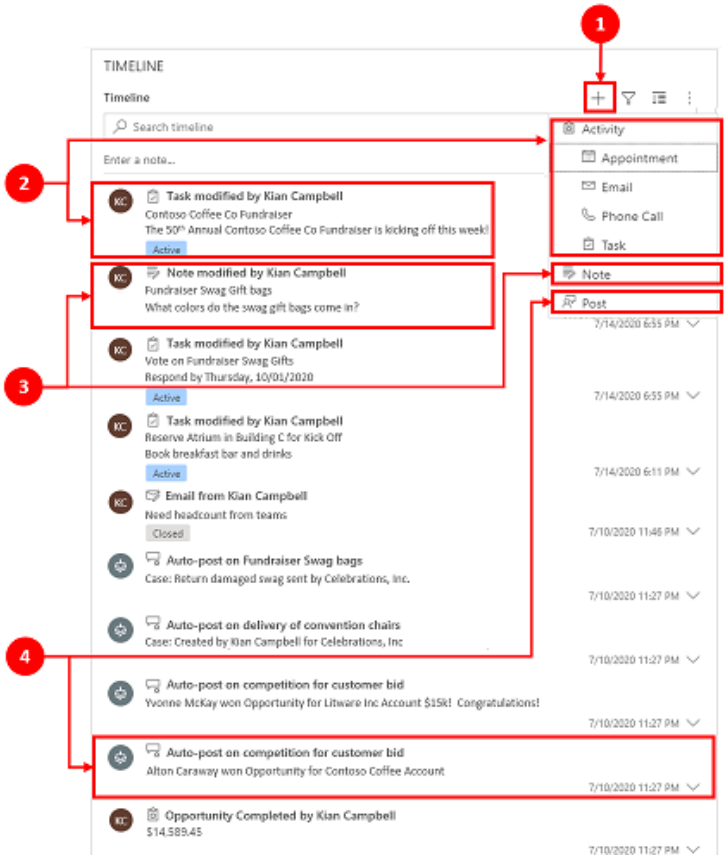
Record types to show

There are three primary record types: Activities, notes, and posts. All record types are enabled by default.

- Activities. Activities can have a large number of customizable subactivity record types to support business needs. Depending on what you've installed, the administrator can create, add, and display many different customized subactivity record types under the **Activity** section of the dropdown menu on the timeline.
- Notes. Notes allow you to capture details related to the table record. For example, you can use notes to capture thoughts, summarize information, and provide feedback on a case, and then update the case details later.
- Posts There are two types of posts: auto and user:
  - **Auto Posts** are system-generated posts that notify you of account activity that has occurred.
  - **User Posts** allow you to leave a message for another user on a record.

> **Note**
>
> Posts require a Dynamics 365 app, such as an app for Dynamics 365 Customer Service.

Enable these record types to be displayed in the timeline

Form designer configuration view	Form designer display view
	
To enable **Record types shown** for **Activities**, **Notes**, and **Posts** on a form, check the box next to the record type.	1. To confirm that the record type is displaying on the form, select **Create a timeline record** + in the top-right nav in the timeline, and a dropdown menu that displays the list of enabled record types appears. 2. When **Activities** are enabled, you see **Activity** record types for appointments, email, phone calls, and tasks. 3. When **Notes** are enabled, you see the note record types on the form. 4. When **Posts** are enabled, you also see the post record types on the form.

> **Note**

Activities and notes are standard entities. If additional solutions have been imported into the environment, other tables may also be displayed.

Activity, notes, post icons, and date / timestamp display on timelines

The timeline shows a simple icon before the activity, note, post, and custom table, making it easy for you to identify the record type.

Dates and timestamps always appear on each record on the bottom-right side of the preview, and are always viewable.

> **Note**
>
> When a custom table has a custom icon, activities related to the custom table are displayed using the default custom table icon not the custom icon.

Advanced

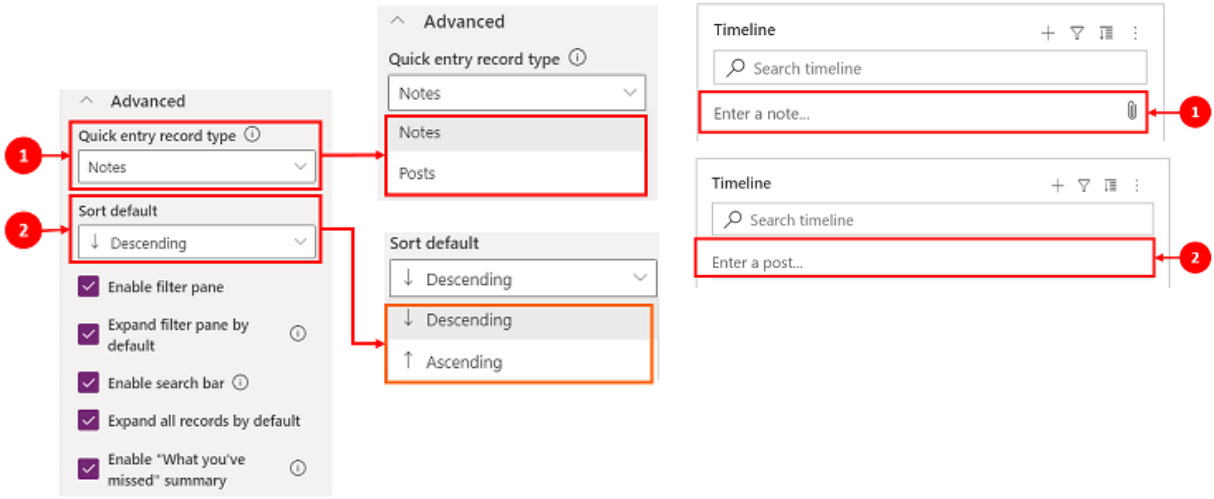
This section describes the settings available in the Advanced area of the timeline control settings. The **Advanced** settings apply to all record types.

When enabling and disabling **Advanced** features, you aren't able to view updates (even though it may appear that there's activity occurring on the timeline component) until you save and publish your configuration updates and refresh the table form.

Advanced covers common settings that span across an activity, note, or post, which are the three primary record types that appear in the timeline section.

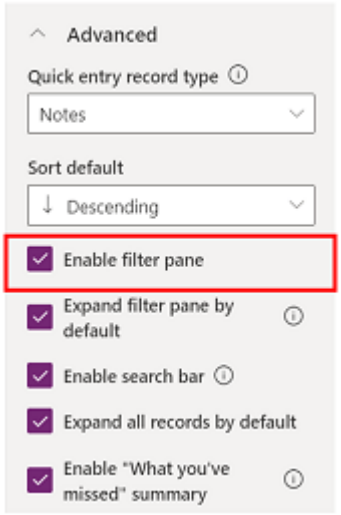
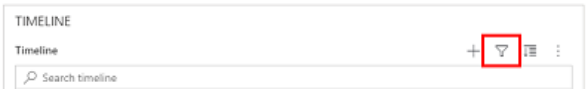
Quick entry record type and sort order default

The following is a detailed overview of the **Advanced** configuration options, starting with selecting your **Quick entry record type**:

Form designer configuration View	Form designer display View
	
1.Select **Advanced** to expand this area in the configuration view. The **Quick entry record** type provides you with quick access to create either a **Note** or a **Post**. The default setting for this setting is set to **Notes**. 2.The **Sort order default** setting controls the order of how all data is sorted on the timeline. The default setting for this setting is set to Descending.	1. When you select **Notes**, it displays under the **Search** bar in the timeline. Also, you see a paperclip icon that allows you to attach files. You can only attach files to Notes. 2. If you select **Posts**, it also displays under the **Search** bar in timeline.

Enable filter pane

Filters provide a quick option to sort and look for specific data quickly.

Form designer configuration View	Form designer display View
	
The **filter pane** setting allows you to enable or disable filter functionality on timeline. It's enabled by default.	Enable the **filter pane** by checking the box next to the setting. This enables the filter icon to display on the timeline.

Form designer configuration View	Form designer display View
	To disable the **filter pane**, clear the box next to the setting and the filter icon no longer appears on the timeline.

Filter records on timeline

Filters are valuable for sorting data. You can quickly filter activities, notes, and posts with multiple options to see what matters to you. The filter is available for the activities, notes, posts, and custom tables that are present in the timeline. The timeline filters and displays the records and the count that are present in the timeline.

When you select filters based on an activity status then those activities, notes, and posts are displayed in your timeline. You can customize data using data filters and either choose to keep filters in place or clear them when you're done.

- When the **Filter** icon is transparent on the table form, it means no items have been selected, therefore the filter pane is empty.
- When the **Filter** icon is dark, it means filters have been set. To view which filters have been designated, select the **Filter** icon and the filter pane displays the filters that have been set.
- Choose how you want to filter data by selecting the box next to the filter.
- Clear filters by selecting the **Clear all filters** icon on the filter pane.

The following category and subcategory options are available on the filer menu:

Category	Subcategory
Record type	• Notes • Activities • Posts
Activity type	• Appointment • Campaign Activity[1] • Campaign Response[1] • Email • Fax • Case Resolution[1] • Letter • Opportunity Case[1] • Order Case[1] • Phone Call • Quote Close[1]

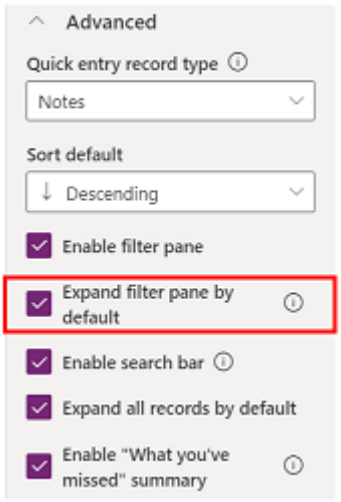
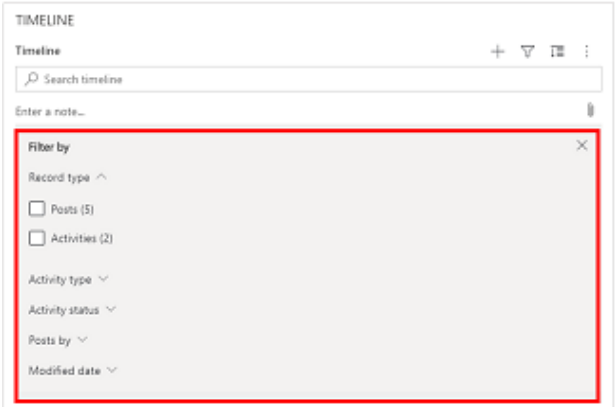
Category	Subcategory
	• Recurring Appointment • Social Activity • Task • Project Service Approval[1] • Booking Alert[1] • Conversation • Session • Customer Voice survey invite[1] • Customer Voice survey response[1] • Custom activities (made available by imported solutions)
Activity status	• Active • Overdue • Closed
Activity status reason	Allows you to filter using specific status reasons. The values are a unique list of all of the status reasons from the activities in the timeline. The status reasons change depending on the activity. If there are multiple activities on the timeline that have the same status reason, it reflects once, but then the number next to it indicates how many occurrences of that status reason appear in the timeline.
Activity due date (active)	• Next 30 days • Next seven days • Next 24 hours • Last 24 hours • Last seven days • Last 30 days
Posts by	• Auto post • Users
Modified date	• Last 24 hours • Last seven days • Last 30 days

> **Note**
>
> By default, the fax and letter records are disabled on the timeline.

[1] Requires a Dynamics 365 app

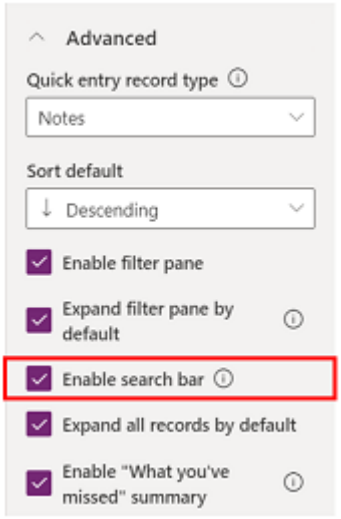
Expand filter pane

The **Expand filter pane** setting provides quick access to sorting options within the timeline. It's enabled by default.

Form designer configure view	Form designer display view
	
The **Expand filter pane by default** setting displays an expanded filter pane at the top of the form anytime it's opened and refreshed. It's disabled by default.	Enable the **Expand filter pane** by checking the box next to the setting. This enables the filter pane to appear at the top of the form anytime the form is opened and refreshed. To disable the **Expand filter pane**, clear the box next to the setting and the filter pane doesn't appear on the timeline.

Enable search bar

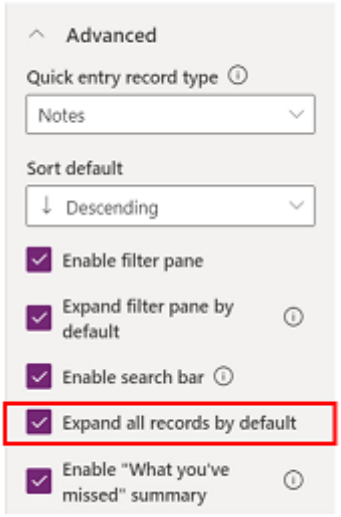
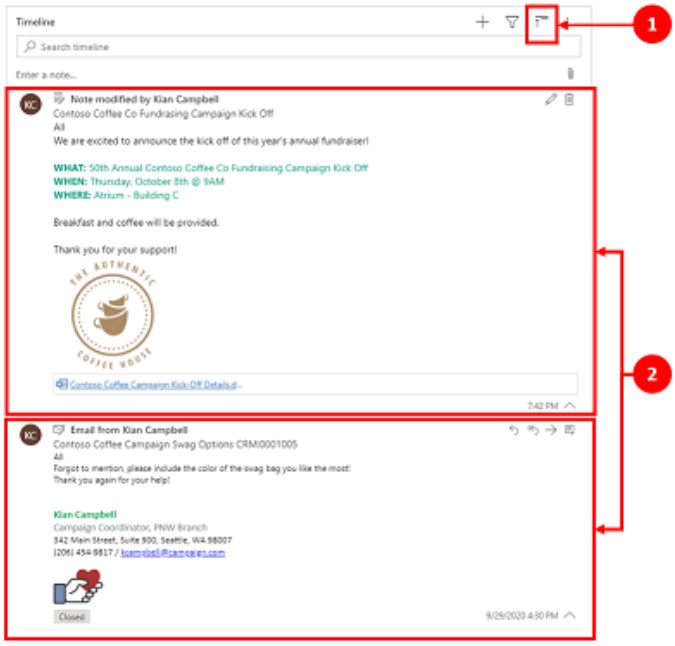
You can search for records in the timeline. When you search for a phrase in the timeline, it searches in the title of the record or body and description column of the record then displays the record for you.

Form designer configure view	Form designer display view
	

Form designer configure view	Form designer display view
Select **Enable search bar** to enable the **Search timeline** bar functionality. It's enabled by default.	Enable the search bar setting to display a **search bar** at the top of the timeline. Disable the search bar by clearing the box next to the setting and the search bar doesn't appear on the timeline.

Expand all records in timeline

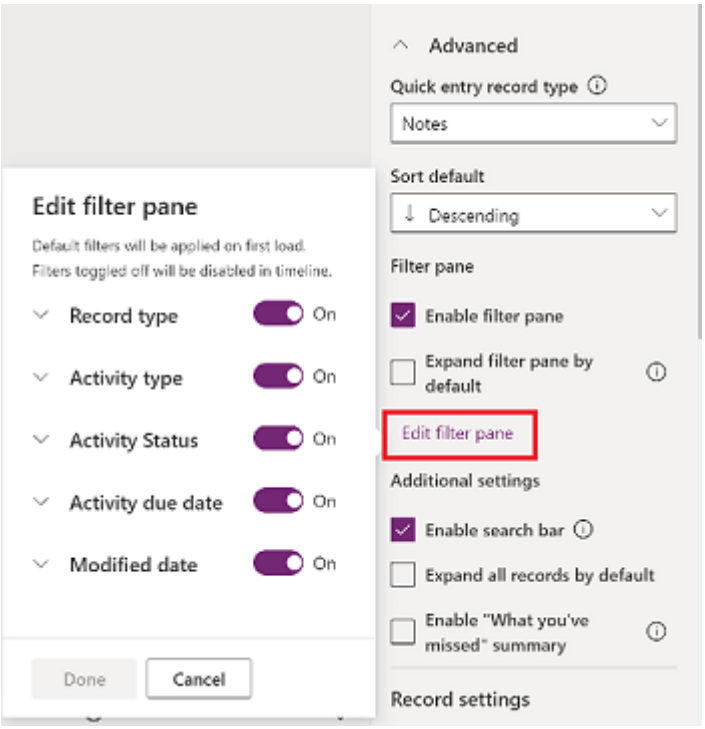
Expand all records by default displays all activities in an expanded view in timeline.

Form designer configure view	Form designer display view
	
Select **Expand all records** to set the default view to display all records in the expanded view format in the form each time the timeline is opened. **Expand all records** is disabled by default.	1. When enabled, the **Expand all records** icon is displayed in the top-right corner of the timeline nav. 2. Records can be expanded or collapsed by using the **Expand all records** icon. When expanded, all records are displayed in the expanded view in the form each time it's opened. When you clear **Expand all records**, it no longer displays activities in an expanded view. When disabled, the **Expand all records** icon doesn't display in the top-right nav of the timeline. Records are always be displayed in a collapsed view.

Edit filter pane

You can configure the default filters that are applied when a form loads or is refreshed using **Edit filter pane**. Remove filter groups by turning the setting **Off**. Users can remove

the default filters to see all the records unless **Enable filter pane** is disabled.

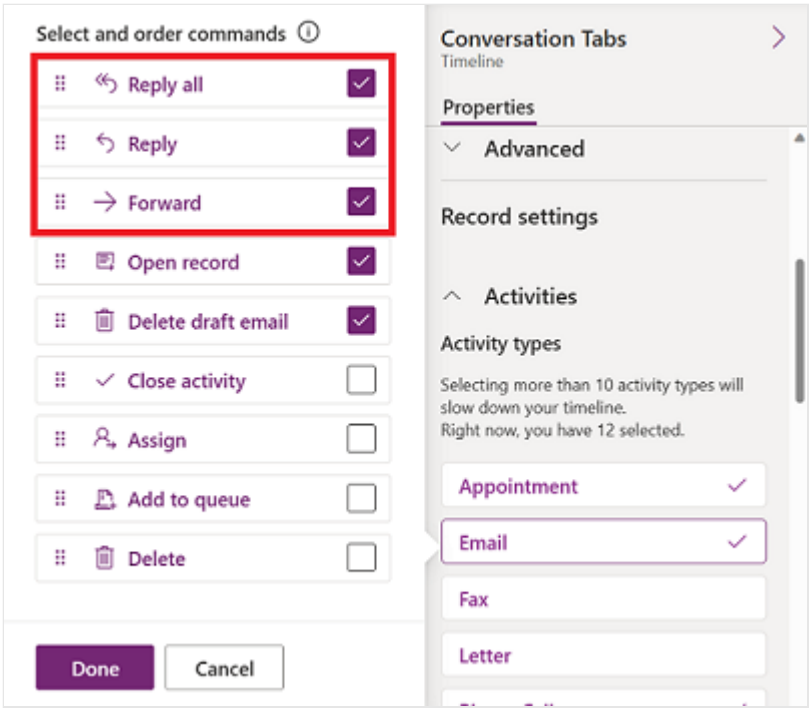


Configure email commands for timeline

You can configure email options for the timeline so that users can reply, reply-all, and forward messages. You can select the order in which the options are displayed for users, and exclude them if they're not needed. Reply-all is the default order setting.

1. Select the form for which you want to apply the email settings, and then in **Properties** in **Conversation Tabs**, select the **Email** activity type. The **Email** properties pane is displayed.

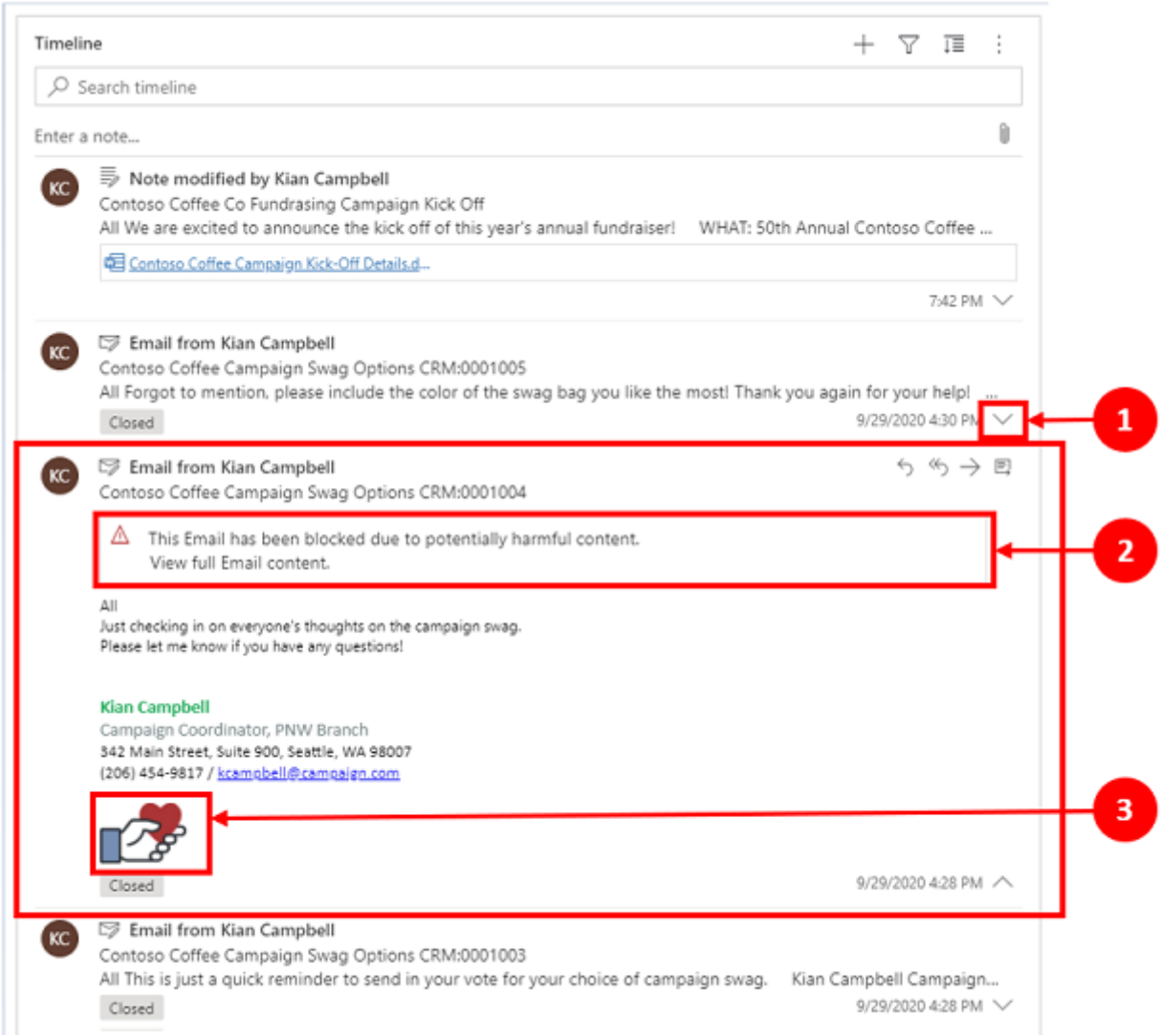
2. In **Select and order commands**, check the boxes for the email commands you want to configure for users. You can drag and drop the options to choose the order in which you want each option to display.



3. Select **Done**, and then save and publish your changes.

Expand records with images in timeline

You can send and receive records with images, but they don't display when the record is collapsed. Records with images must be expanded to be viewed.



1. Records when collapsed provide a visual summary. To expand an individual record, select anywhere on the timeline record to expand and collapse a record view. In the bottom-right corner of the record, there's a caret:

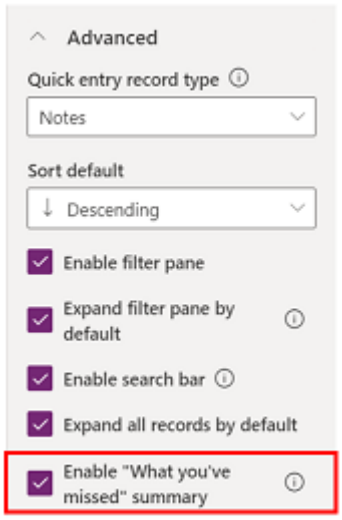
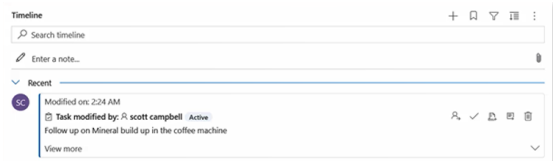
    - When the caret is facing downward (v), the record is collapsed.
    - When the caret is facing upward (^), the record is expanded.

2. Records with images might display the following notice:
   This email has been blocked due to potentially harmful content. View full email content.

3. When you select the message, the warning goes away, and the image appears.

Enable "What you've missed" summary

What you've missed helps you stay on top of updates and changes made to records by displaying updates at the top of the timeline when you access a record.

Form designer configure view	Form designer display view
	
The **What you've missed** setting displays new records you haven't seen. It's enabled by default. To disable it, clear the box next to the setting.	When enabled, when you view an account record, the newest activities appear at the top of the list.

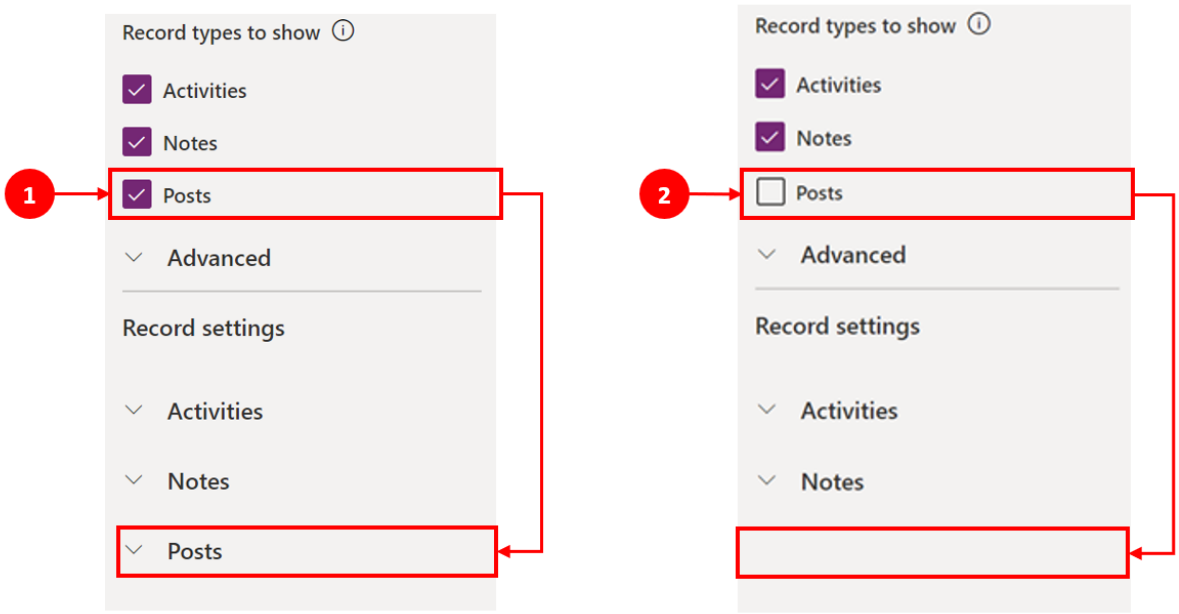
Record settings

This section describes the settings available in the Record settings area of the timeline control settings. The **Record types to show** setting determines the record types that are affected by the **Record settings** described here.

Record settings let you manage the settings within the record types.

- The **Activities** record type is tied to **Activities** in record settings.
- **Notes** record type is tied to **Notes** in record settings.
- **Posts** record type is tied to **Posts** in record settings.

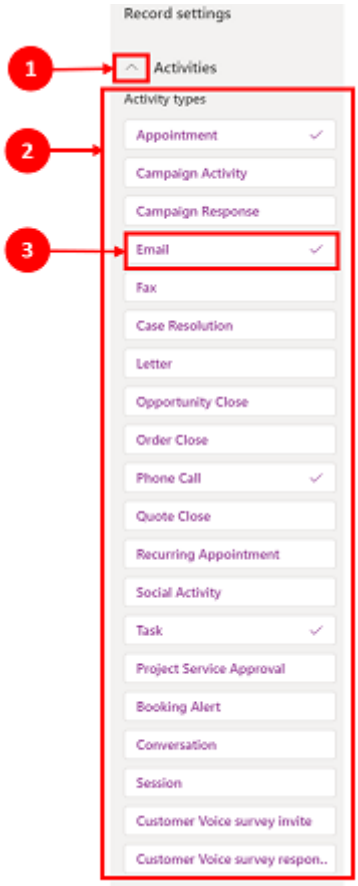
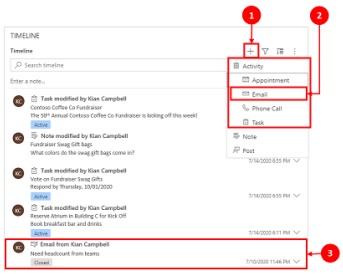
To enable or disable a record type, select or clear the checkbox. Then, that record type either displays or no longer appears in the **Record settings** section.



1. When **Posts** is checked in the **Record types to show** section, it's enabled in the **Record settings** section.
2. When **Posts** is cleared in the **Record types to show** section, it's disabled in the **Record settings** section.

Configure activity record types

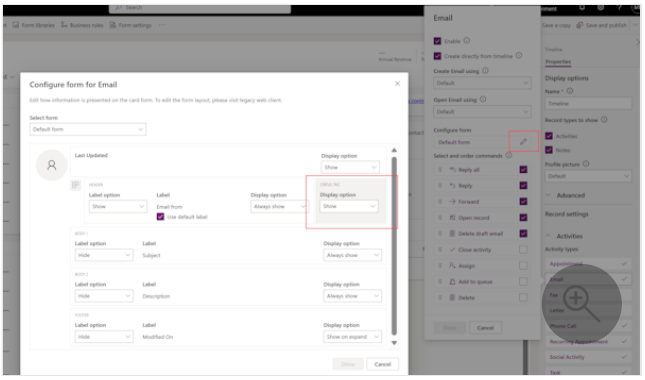
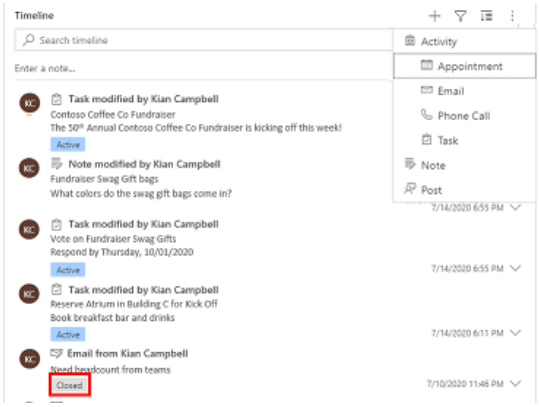
When you expand the **Activities record settings** on the timeline component section, a list is displayed that shows all the activity types that can be either enabled or disabled on the table form.

Form designer configuration view	Form designer display view
	
1. Expand and view **Activities** under the **Record settings** section using the caret (^). 2. A list of **Activity types** is displayed in the expanded view. 3. You can enable or disable an activity by selecting an activity type. For example, enable **Email**. To enable an **Activity type**, check the box next to **Enable** and select **Done**. To disable an **Activity type**, clear the box next to **Enable**, and then select **Done**. This action disables all other items in the box and disables the activity type from displaying on the timeline. This action also disables the activity type from being created or viewed in the timeline.	1. When enabled, an **Activity type** appears under the **Create a timeline record** +. 2. The activity type is displayed as an option the user can choose from the dropdown menu. 3. Also, the **Activity type** record is displayed in the body of the timeline.

> **Note**
>
> A check mark appears to the right, next to enabled **Activity types**. Additional record type settings are disabled until they're enabled under that specific record type.

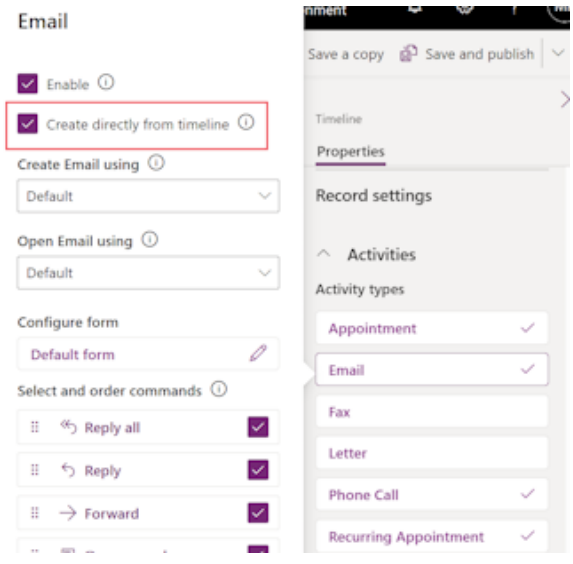
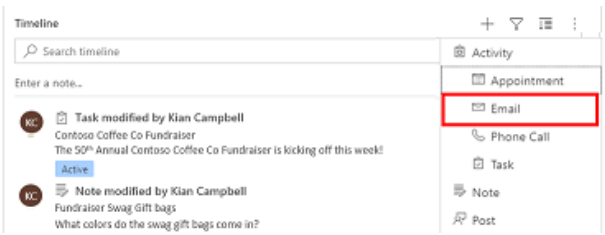
Show status tags on activity record types

Status tags match the status filter that display in the timeline to help you to see at a glance if the state of an activity record is **Active**, **Overdue**, or **Closed** on an activity, such as a task, appointment, or email. Makers enable or disable status tags for any **Activity type** in the default form configuration. Status tags are enabled by default.

Form designer configuration view	Form designer display view
	
To display email status tags, select **Default form** (pencil icon) > **Show** in the **Display option** dropdown list under **STATUS TAG**.	When enabled, status tags such as **Active**, **Overdue**, or **Closed** appear in the timeline next to that activity record.

Enable the ability to create directly from timeline

App makers have the ability to enable activity types so they can be created directly on the timeline. Having the ability to quickly select and create an activity, such as email, tasks, and appointments, helps to streamline productivity.

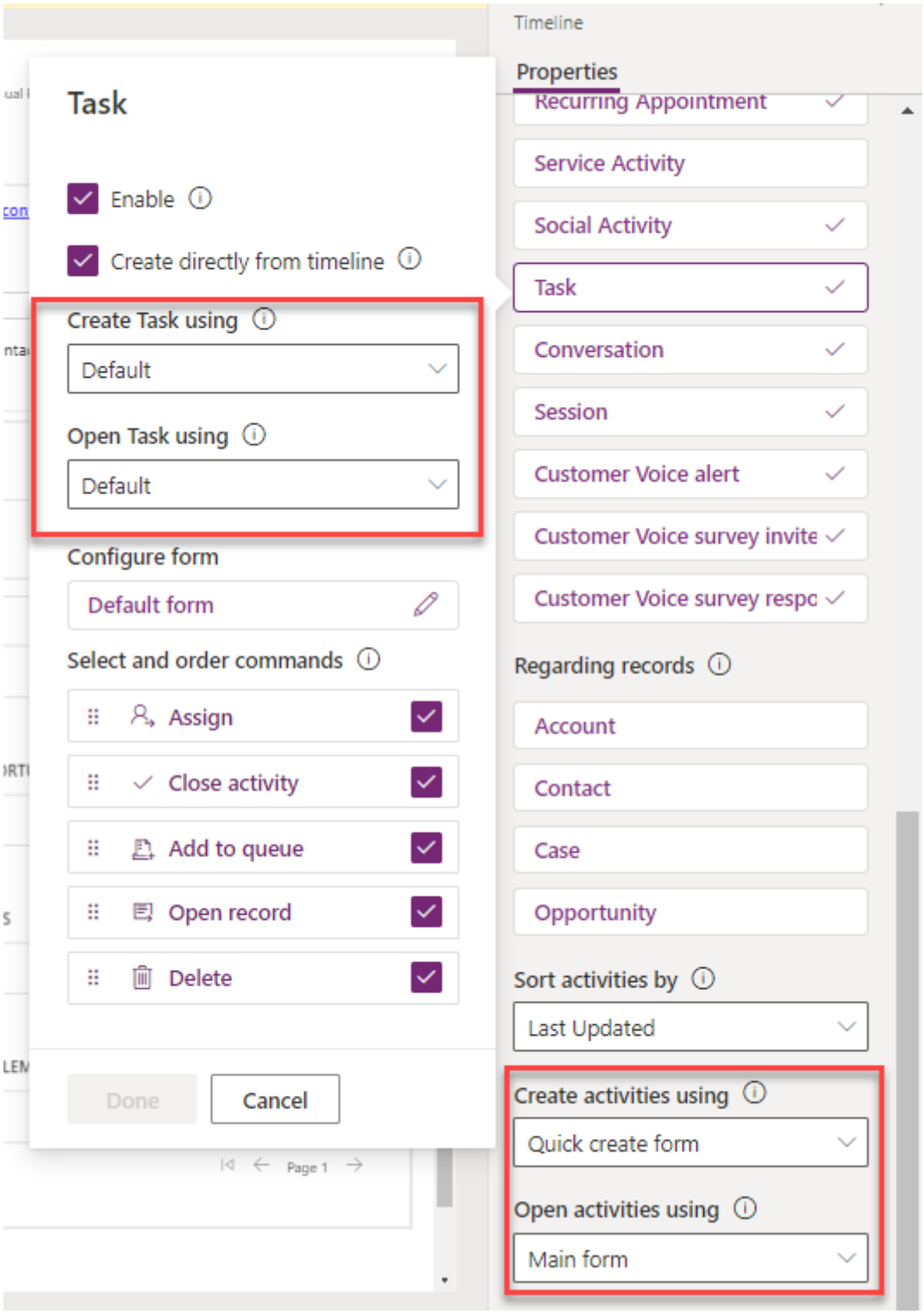
Form designer configuration view	Form designer display view
	

Form designer configuration view	Form designer display view
To allow users to create activity types directly from the timeline, check the box next to **Create directly from timeline**.	When enabled, the activity type appears in a dropdown box on the **Create a timeline record** + icon in the top-right of the timeline.

Set form types to create and open activities

Set the **Create activities using** and **Open activities using** individually for an activity type or for all activity types to set the form type users use based on your business needs. You can set these fields as follows:

- Select an activity type in **Activities** and specify the values.
- Specify the value for these fields in the **Activities** pane.



If you set the following form type for a specific activity, the application considers the following settings:

- **Default**: The form type in the **Create activities using** or **Open activities using** in **Activities**.
- **Quick create form**, **Main form**, or **Main form dialog**: The activity specific setting irrespective of the form type set in **Create activities using** or **Open activities using** in **Activities**.

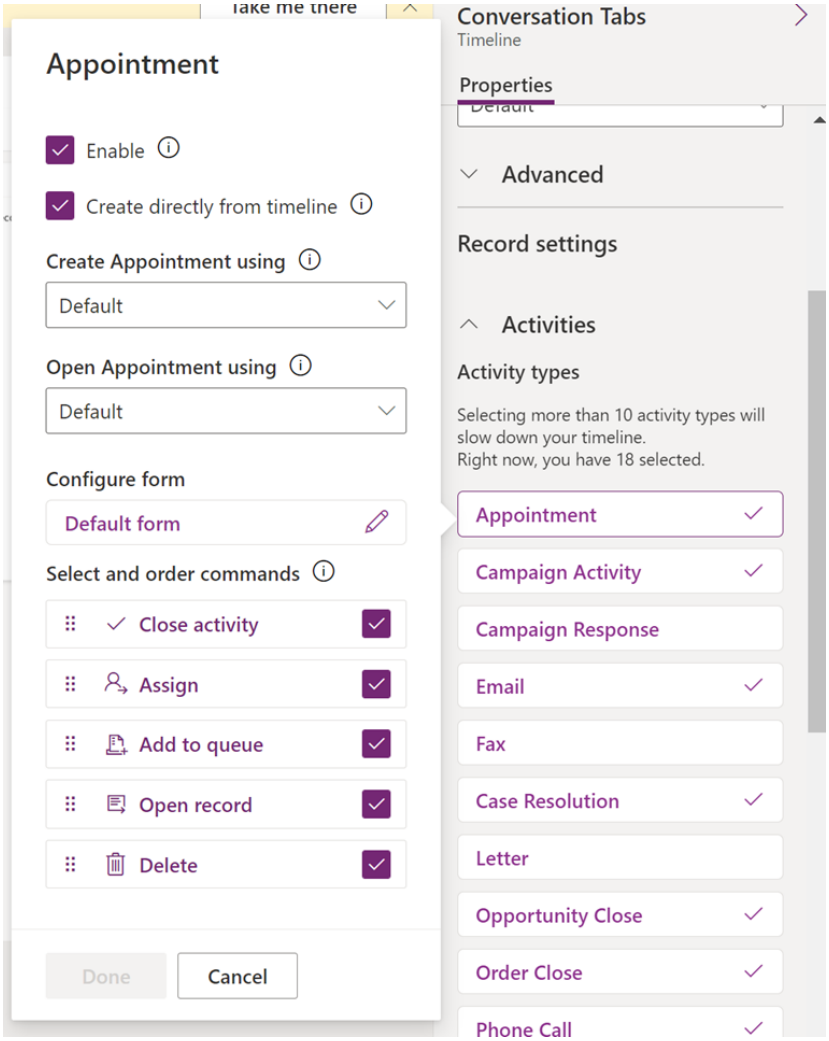
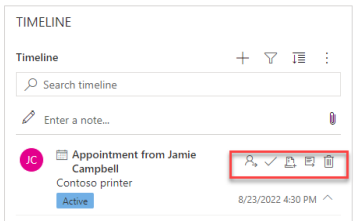
When the user selects the activity from the create a timeline record or opens an activity from the timeline, the activity is either created or opens in the selected form type.

Enable command actions on activity record types (Preview)

> **Note**
>
> These features are part of an early access release. You can opt in early to enable the features in your environment, which allows you to test them and then adopt them across your environments. For information about how to enable these features, see **Opt in to early access updates**.

Command actions allow users to assign, close, delete, open a record, or add a record to a queue for activities from the timeline. You can enable or disable the command actions for a specific activity type.

Based on the activity type, you can also enable other command actions. For example, for an email you can also enable actions such as Reply, Reply All, and Forward.

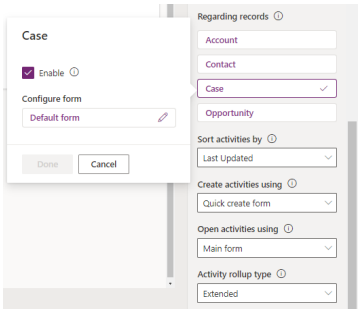
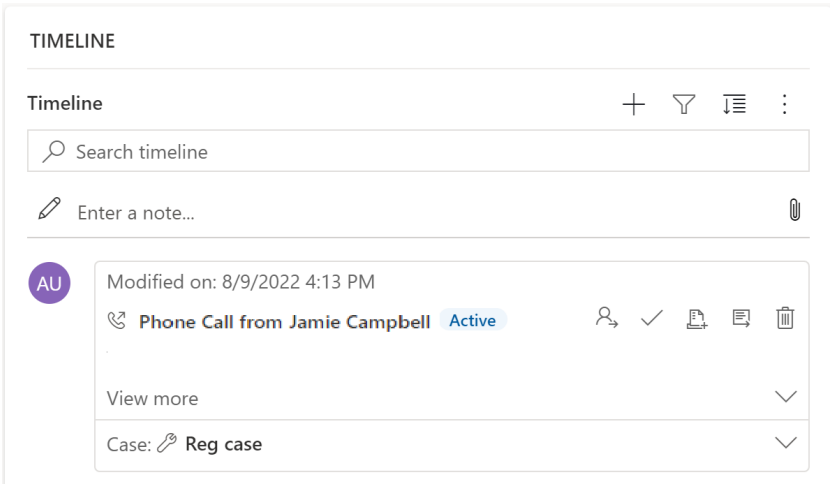
Form designer configuration view	Form designer display view
	

To allow users to enable command actions for an activity directly from the timeline, check the box next to command action in **Select**

Form designer configuration view	Form designer display view
and order commands. You can only enable five command actions for an activity.	
You can also move the position of the command actions to change the order in which they're displayed on the timeline.	When enabled, the command action appears on the activity record in the timeline.

Display related records on the timeline

Accounts, contacts, cases, and opportunities linked to an activity are displayed on the timeline record. The administrator can enable or disable the records in **Regarding records**.

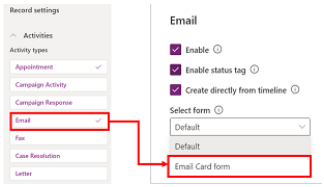
Form designer configuration view	Form designer display view
	
1. Expand and view activities under the **Record settings** section using the caret (^). 2. A list of records are displayed in **Regarding records**. 3. To enable records, select the box next to **Enable** and select **Done**.	When the checkbox is enabled, users can view the linked records to an activity. The record linked to the activity is then displayed on the timeline. The linking of the record is not manual and it occurs due to the rollup of the record. More information: Set the activity rollup type in timeline

> **Note**

A check mark appears next to the enabled record. Disabling the table type only disables the linked record for the Timeline records rolled up for that table.

Create and use card forms in timeline

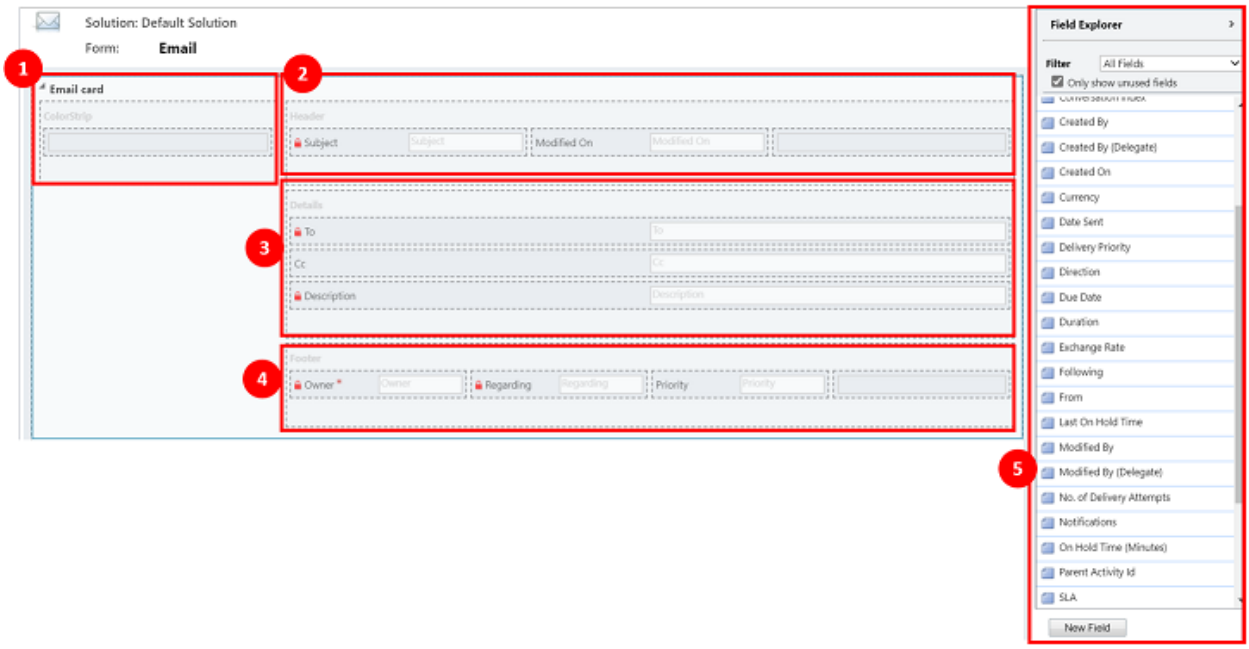
Records are displayed using the default setting for each activity type. However, if you want to display record information for an appointment or email, for example, you can either edit the existing card form, use a different card form from record settings, or customize your own.

Form designer configure view	**Form designer display view**
	
You can change the default card settings to a different card form if one has been created.	If you create a new card form, you must go to the parent table and add the new form of card type there before it appears in the timeline list for configuration. If **Default** is displayed, you aren't using the card form. You can't use the **Email card form** in a timeline unless you select and publish it first.

> **Note**
>
> Not all activity types allow you to create card types, so the default selection is your only option for those records.

Customize a card from within timeline

All card forms are separated into the following four sections:



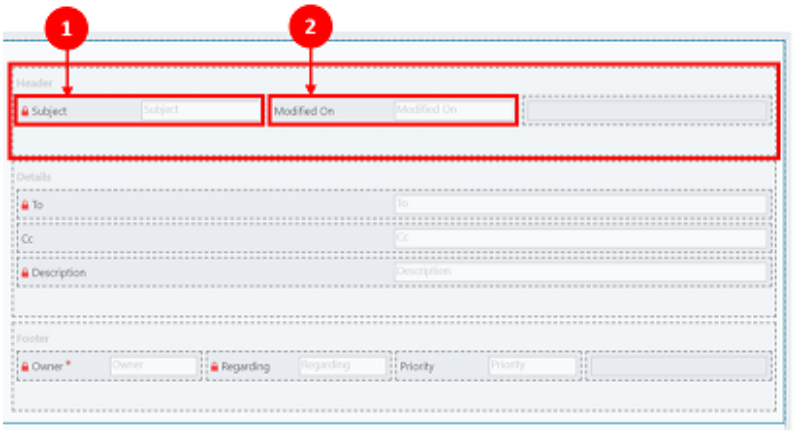
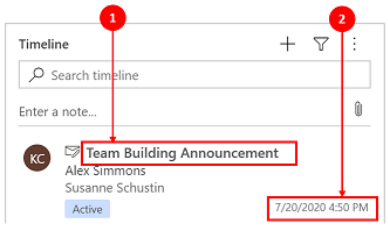
Legend

1. **ColorStrip**: This section doesn't appear on the timeline record. The **ColorStrip** is located on the left of the card form.
2. **Header**: This section is displayed on the timeline record; however, only the first two columns are displayed on the timeline record. For this example, only the **Subject** and **Modified On** columns are visible.
3. **Details**: This section is displayed on timeline record; however, only the first three columns are displayed on the timeline record. For this example, only the **To**, **CC**, and **Description** columns are visible on the timeline record.
4. **Footer**: This section isn't displayed on the timeline record.
5. **Table columns**: You can select which columns you want to add to your card form from the column options listed. You can customize your card form by dragging and dropping the columns you want to use into the sections you want that column to appear in on the timeline record.

Each individual card form must be customized for each activity record, such as email, tasks, posts, and so forth.

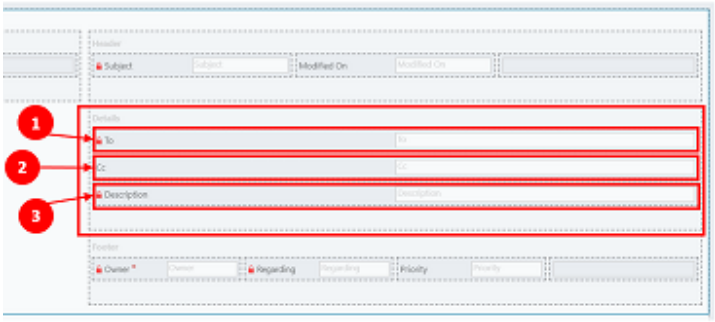
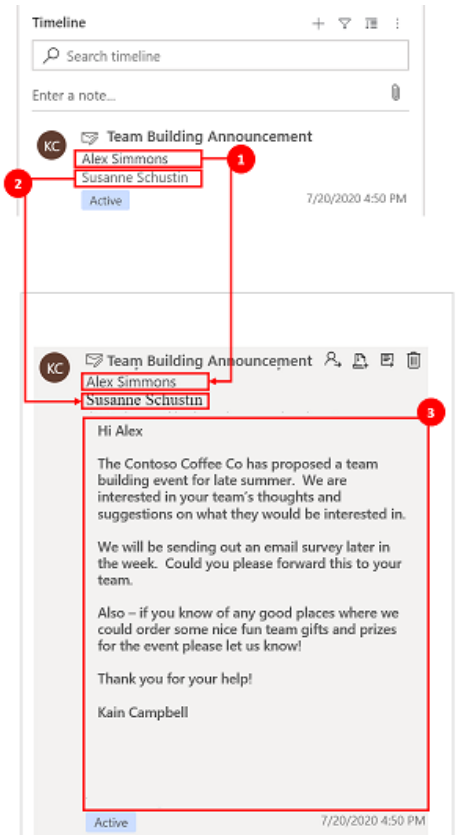
Header section

The card **Header** displays the title/subject in your timeline email form. You can have up to six columns in the **Header** section, but only the first two columns are seen on the timeline record. The form ignores empty columns in all sections.

Form designer configuration view	Form designer display view
	
Column 1 1. Regardless of the column you choose for this section, it appears as a bold header at the top of your timeline record. For this example, we selected **Subject** for this column. **Column 2** 2. Again, regardless of the column you choose for this section, this column always appears in the bottom-right corner of the timeline record. For this example, **Modified On** is selected for this column.	**Column 1** 1. Column 1 from the card header is always displayed in this section of the timeline record. **Column 2** 2. Column 2 from the card header is always displayed in this section of the timeline record.

Details section

The card **Details** section displays in the body of your timeline email record. You can have up to four columns in the **Details** section, but only the first three columns are viewable on the timeline record.

Form designer configuration view	Form designer display view
	

The card details always appears below the header regardless of the column you choose.

Column 1

1. In the card details Column 1 acts as a subheader on the timeline record. For this example, **To** is selected for this column.

Column 2

2. This column only displays one line of text in a summary view on the timeline record. When you expand your timeline record, content in this column is fully displayed and formatted. For this example, **CC** is selected for this column.

Column 3

3. This column follows the content of Column 2 and is part of the main body of your timeline record that is only viewable when you expand the record. For this example, **Description** is selected for this column.

Column 1

1. This column always displays in this section and acts as a subheader on the timeline record.

Column 2

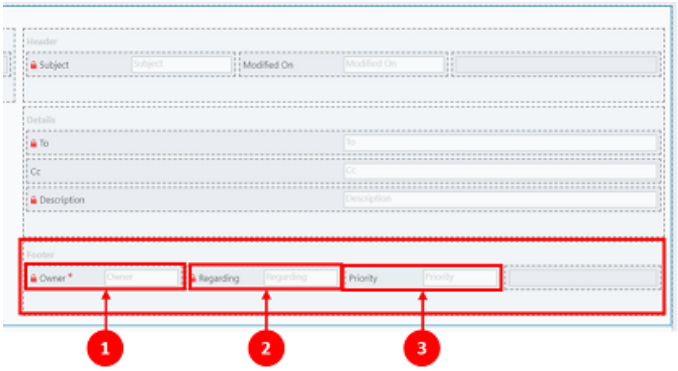
2. This column always displays in this section and only displays one line of text in the summary view but when expanded, content is fully displayed.

Column 3

3. This column always displays in this section and is only viewable when the record is expanded.

Footer section

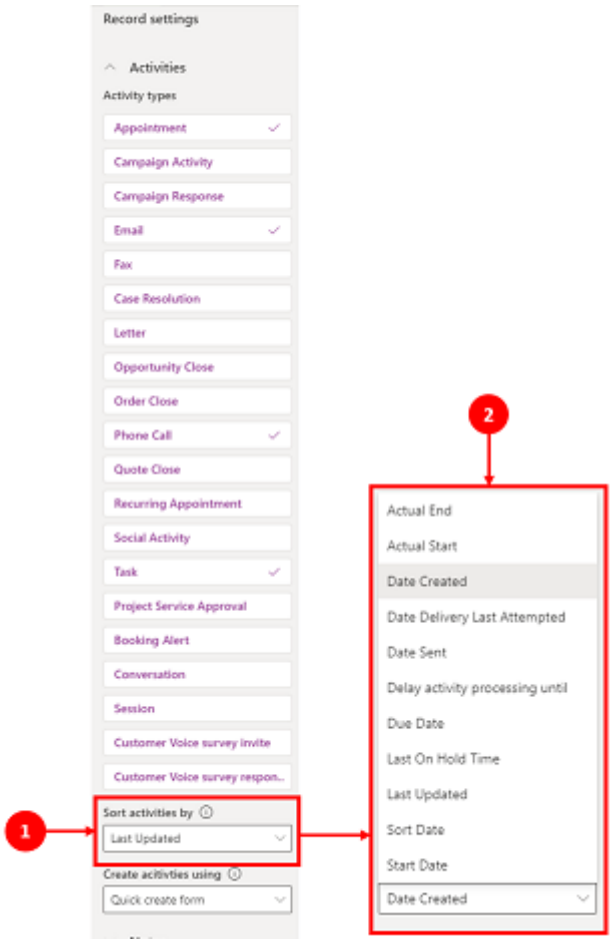
This section isn't visible on the timeline record.

Form designer configuration view	Form designer display view
	
Column 1 1. For this example, we selected **Owner** for this column. **Column 2** 2. For this example, we selected **Regarding** for this column. **Column 3** 3. For this example, we selected **Priority** for this column.	These columns aren't visible on the timeline record

> **Note**
>
> Records *Modified On* are all updated to the same time by which the modification occurred and & *Modified By* is assigned to one user when the table is assigned to a new user. This occurs due to the cascading behaviour. More information: **Configure table relationships cascading behavior**

Set the date to use when sorting activities in timeline

How users view data is important, and setting a default display view of the data varies based on the needs of your business. App makers can choose how data is sorted and create a default setting for **Activity types** in **Record settings**. **Last Updated** is on all activities, which is why it's set as the default in ascending order.



Legend

1. The **Sort activity by** setting in the **Activities record settings** allows you to control how data is sorted in timeline.
2. The **Sort activities by** column displays a list when selected. You can select from this list how you want your data to be sorted and displayed on timeline in the form.

Sort date

Some dates can only exist on specific types of activities. For example, **Date sent** or **Date delivery last attempted** only apply to email. If you sort by such dates, then non-email activities end up grouped together without any ordering. You can't create a custom date column, but if you need more flexibility, you can use **Sort date**, which is empty by default and requires that you populate it for each activity record with the date you want to use for sorting. Some of the ways you can populate the date are by using Microsoft Power Automate, business rules, or JavaScript.

When using Sort date, keep in mind the following:

- If you set a value in **Sort date**, you can use it for more customized sorting, but you have to populate it for every activity record or it doesn't work. The sort date has to

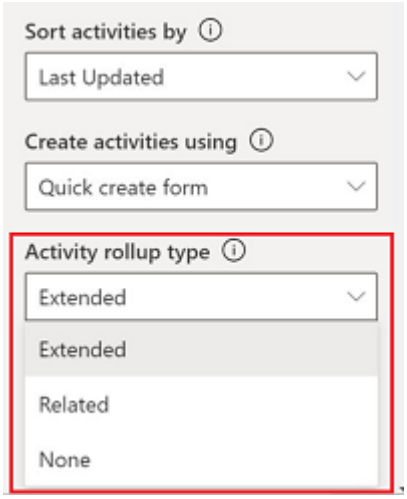
be configured for each timeline instance, and must be set up for all three main forms in the account table.

- If the **DateTime** column is on the same calendar day, the date doesn't display if **DateTime** was earlier in the day compared to the current time.
- The sort date isn't based on a 24-hour period, but rather, compares the **DateTime** column value with the current date and time (based on the user's preferred time zone). If the value entered occurred earlier in the day, the date isn't displayed.

Set the activity rollup type in timeline

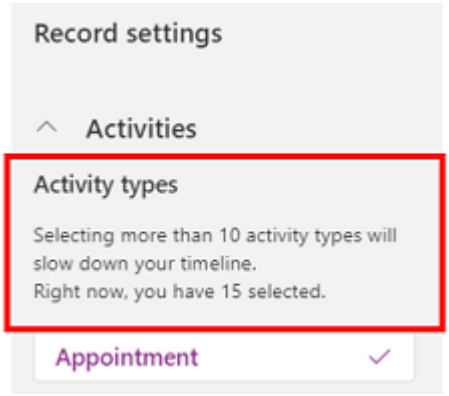
The activity rollup type can be configured for timelines on forms for the account and contact tables. The available types of rollups are **Extended**, **Related**, and **None**. Activity rollup only affects accounts and contacts in Dynamics 365 apps, such as Dynamics 365 Customer Service applications. To only show activities that are directly related to the table in timeline, select **None**.

More information on rollup types is available from RollupType EnumType.

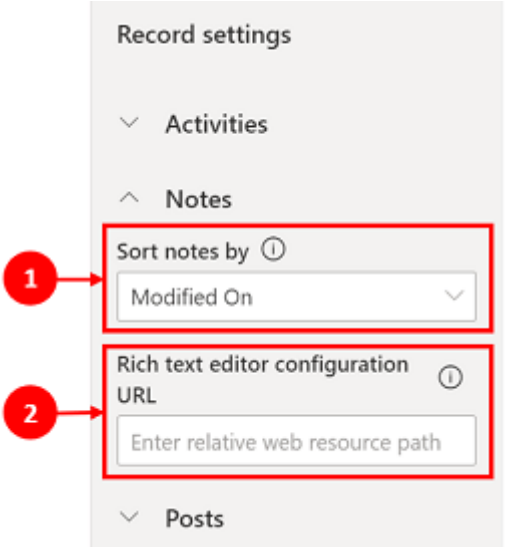
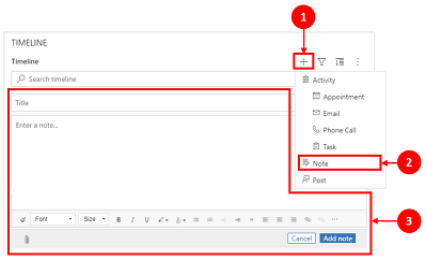


Timeline performance

Only enable the activities that you need on the form. If you select more than 10 **Activity types**, a warning notice displays to let you know that the number of activity types you have selected impacts the performance of your timeline. To improve timeline performance, consider limiting activity types to 10 or less.



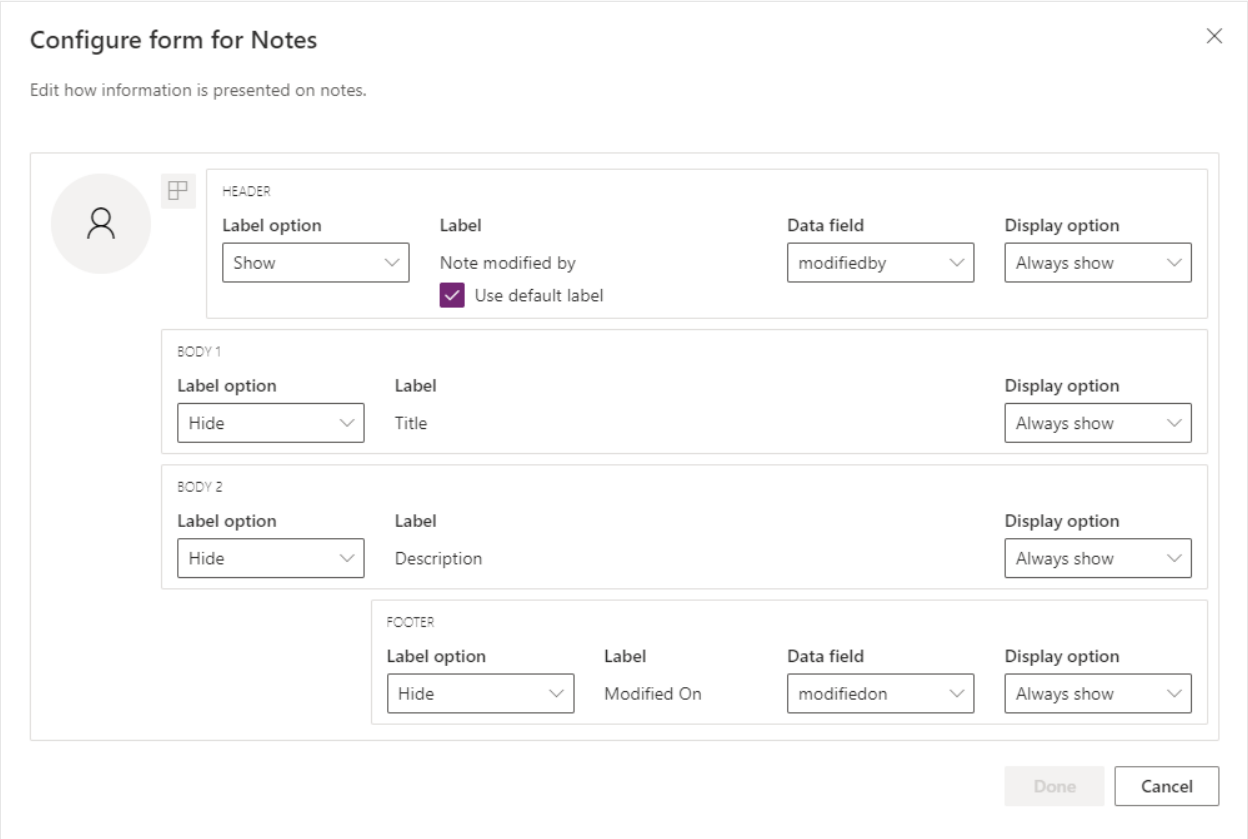
Notes on timeline

Form designer configuration view	Form designer display view
	
The **Notes** section expands when enabled and allows you to: 1. **Sort notes by** date created or date modified. The **Modified On** date is the default setting. 2. Add a relative web resource path in the **Rich text editor configuration URL** column for customized note capability. More information: Add the rich text editor control to a model-driven app	1. When enabled, Notes can be access via the **Create a timeline record** + icon. 2. A dropdown list appears where you can access **Notes**. 3. Use **Notes** to create a note to add to a record using rich text editing. You can set the font and size for the notes from the timeline, without having to set it multiple times.

Configure the form for notes

In the **Notes** area, under **Configure form**, select **Default form** to configure how information is displayed in notes, such as relevant users and dates, and whether or not

to include labels. This setting lets you increase or reduce the number of timeline records that display.



- Header
  - Label option: Hide, show, or show on hover the label, "Created by" or "Modified by".
  - Label: Select the **Use default label** checkbox label to display the label "Note modified by". Clear the checkbox to display the label "Modified by".
  - Data column: Select to show either the user who created the note or the user who modified the note. The label changes to match the data column you selected.
  - Display option: Always show, show on expand, or hide this header containing the user who created or modified the note.
- Body1
  - Label option: Show or hide the label of the note.
  - Display option: Always show, show on expand, or hide the body text.
- Body2
  - Label option: Show or hide the label of the note.
  - Display option: Always show, show on expand, or hide the body text.
- Footer
  - Label option: Show or hide the label, "Created on", "Modified on", or "Overridden on".
  - Data column: Select to show the createdon, modifiedon, or overridenon date.

- Display option: Always show, show on expand, this footer containing the createdon, modifiedon, or overridenon date.

Set the notes rollup type in timeline

> **Note**
>
> This is an early access feature. You can opt in early to enable these features in your environment, which allows you to test these features and then adopt them across your environments.

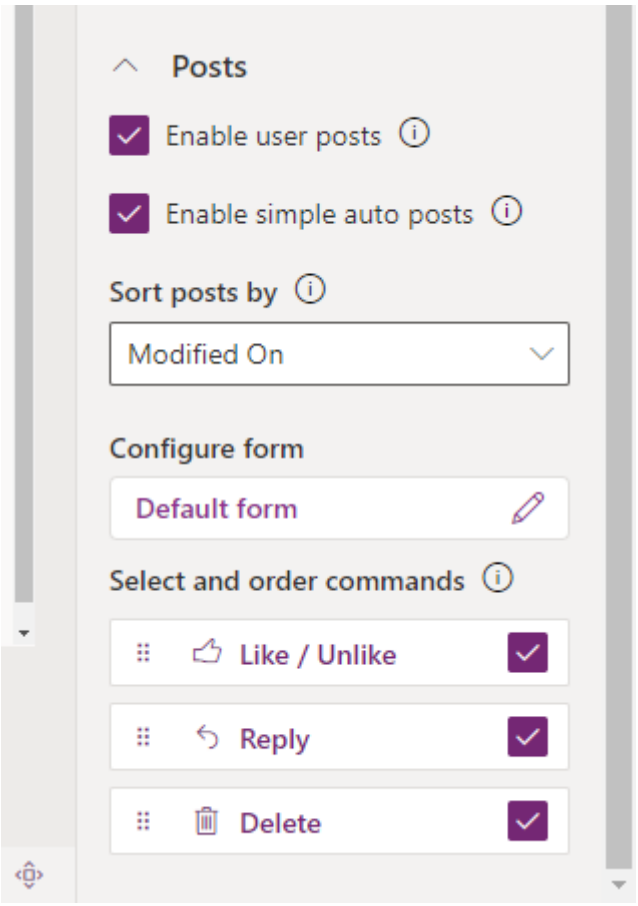
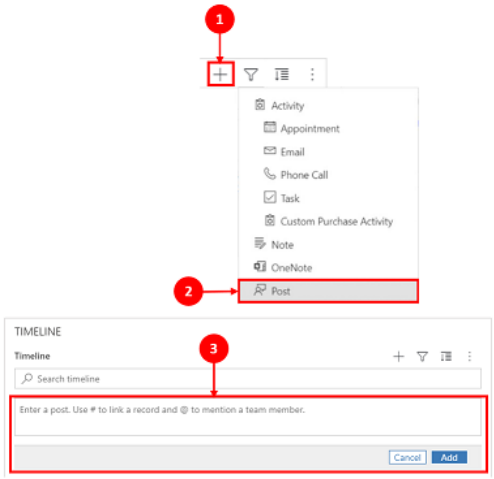
The rollup type can be configured for timelines on forms for notes. The available types of rollups are **Extended**, **Related**, and **None**. To show those records only that are directly related to the notes in timeline, select **None**.

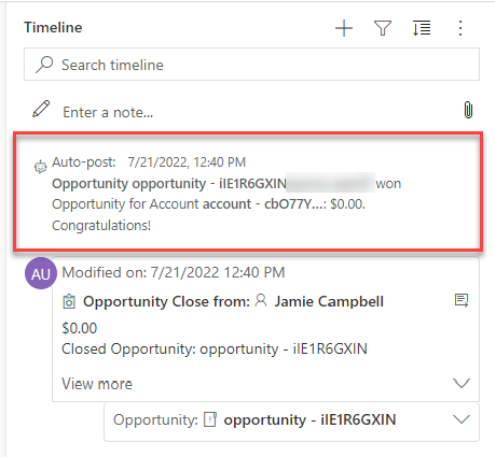
More information on rollup types is available at RollupType EnumType.

Posts on timeline

To enable rich text posts on the timeline, contact Microsoft Support.

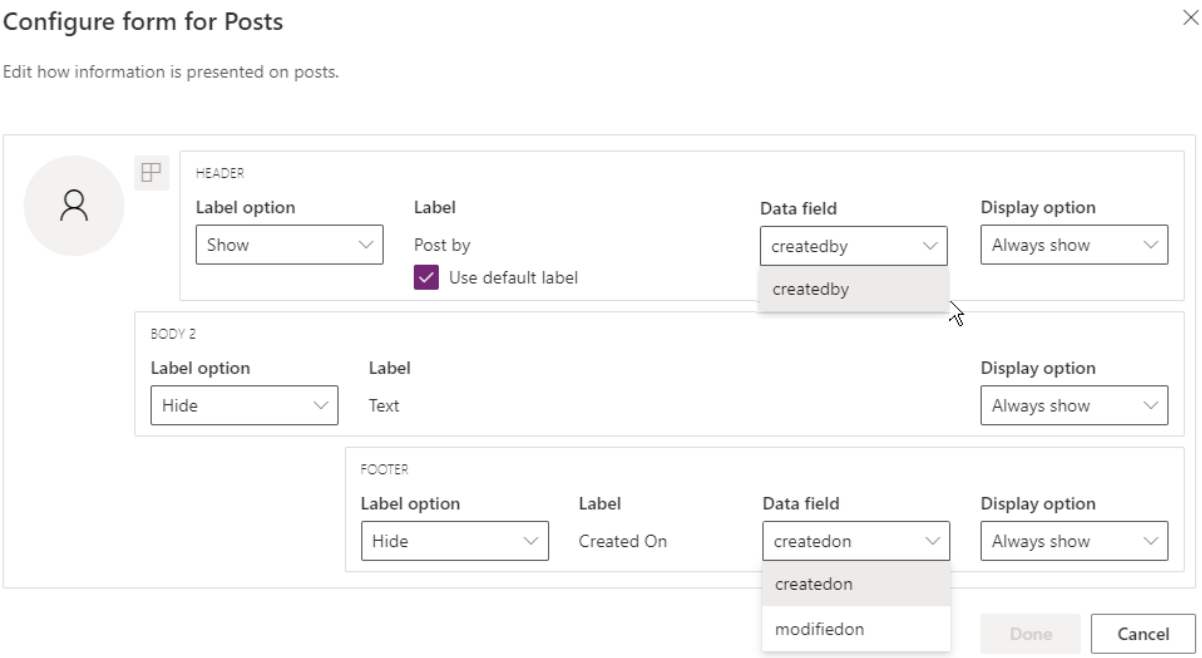
> **Note**
>
> Posts are only available with certain Dynamics 365 apps, such as apps for Dynamics 365 Customer Service.

Form designer configuration view	Form designer display view
	
The **Posts** section expands when enabled and allows you to: - Select **Enable user posts** enabling users to leave a message on the record - **Sort posts by** date created or date modified. The **Created On** date is the default setting. - The **Select and order commands (Preview)** section allows users to display the command actions that can be performed on posts displayed on the timeline. You can also move the position of the commands to change the order in which they're displayed on the timeline.	1. When enabled, posts can be accessed by selecting **Create a timeline record** +. 2. A dropdown menu displays, and you can access **Posts**. 3. Use **Posts** to create a post to add to a record. When date **Created On** is used to sort posts on the timeline, the location in the timeline remains constant even when there are responses to that post. When date **Modified On** is used to sort posts on the timeline, the location in the timeline adjusts to the top when there are responses to that post. **NOTE**: The timeline doesn't automatically refresh when post replies are added.

Form designer configuration view	Form designer display view
The **Enable simple auto posts (Preview)** allows auto posts to be displayed either in the existing card format or as a simple post. Clear the checkbox to display the posts in the existing card format. The checkbox is selected by default.	
	When the **Enable simple auto posts (Preview)** checkbox is enabled, the posts aren't displayed in card form. Command actions can't be performed on auto posts from the timeline.

Configure the form for posts

You can configure how information is displayed in posts, such as relevant users and dates, and whether or not to include labels. This enables you to increase or reduce the number of timeline records that appear onscreen.



Go to your timeline configuration in make.powerapps.com, scroll down to the **Posts** section containing the **Configure form** column, and edit the following column in the default form:

- Header
  - Label option: Hide, show, or show on hover the label, "Created by" or "Modified by".
  - Label: Select the **Use default label** checkbox label to display the label.
  - Data column: Select to show the user who created the post. The label changes to match the data column you selected.
  - Display option: Always show, show on expand, or hide this header containing the user who created the post.
- Body2
  - Label option: Show or hide the label of the post.
  - Display option: Always show, show on expand, or hide the body text.
- Footer
  - Label option: Show or hide the label, "Created on", "Modified on", or "Overridden on".
  - Data column: Select to show the createdon or modifiedon date.
  - Display option: Always show, show on expand, this footer containing the createdon or modifiedon date.

Configure mentions in notes and posts on timeline

To enable mentions in notes and posts, contact Microsoft Help + support. You can also temporarily try out this feature before asking Microsoft to enable it by appending the following text string to your current browser session URL:

```
&flags=FCB.TimelineWallRichTextPosts=true,FCB.TimelineNotesRichTextMentions=true
```

When the rich text editor is enabled, users can mention other users and entities in notes and posts using the @ and # symbols. Configuration for the rich text editor is available in the maker experience in **Power Apps**: make.powerapps.com. The users and entities that are displayed are pulled from the configuration file provided in the **Rich text editor configuration URL** column. More information: Use the rich text editor control in Power Apps

By default, the @ symbol returns matches with the first name, family name, or email address of system users starting with the search string.

By default, the # symbol returns matches with the account and contact name table records starting with the search string.

As an administrator, you can configure other entities to appear when a user types these symbols. Adding more entities to the default configured entities may result in slower load times, so only add the entities your organization requires. You can add the following entities:

- "systemuser"
- "contact"
- "competitor"
- "lead"
- "account"
- "incident"
- "opportunity"
- "knowledge article"

To configure more entities, add and modify the following code to the configuration file you're using for rich text notes and posts:

```
"defaultSupportedProps": {
   "pcfmentions" : {
       "markerMap" : {
           "@" : ["systemuser"],
           "#" : ["account", "contact"]
       },
       "calloutWidthInpx" : "300px",
       "debounceInms" : 250
   }
 }
```

The "systemser" table persists for @ and the "account" and "contact" entities for # regardless of how the file is edited.

> **ⓘ Important**
>
> The mentions feature doesn't work with Power Platform environments that were created with the **Enable Dynamics 365 apps** option set to **Yes**. For more information about this option, go to **Create an environment with a database**.

Configure autopost messages to display on the timeline

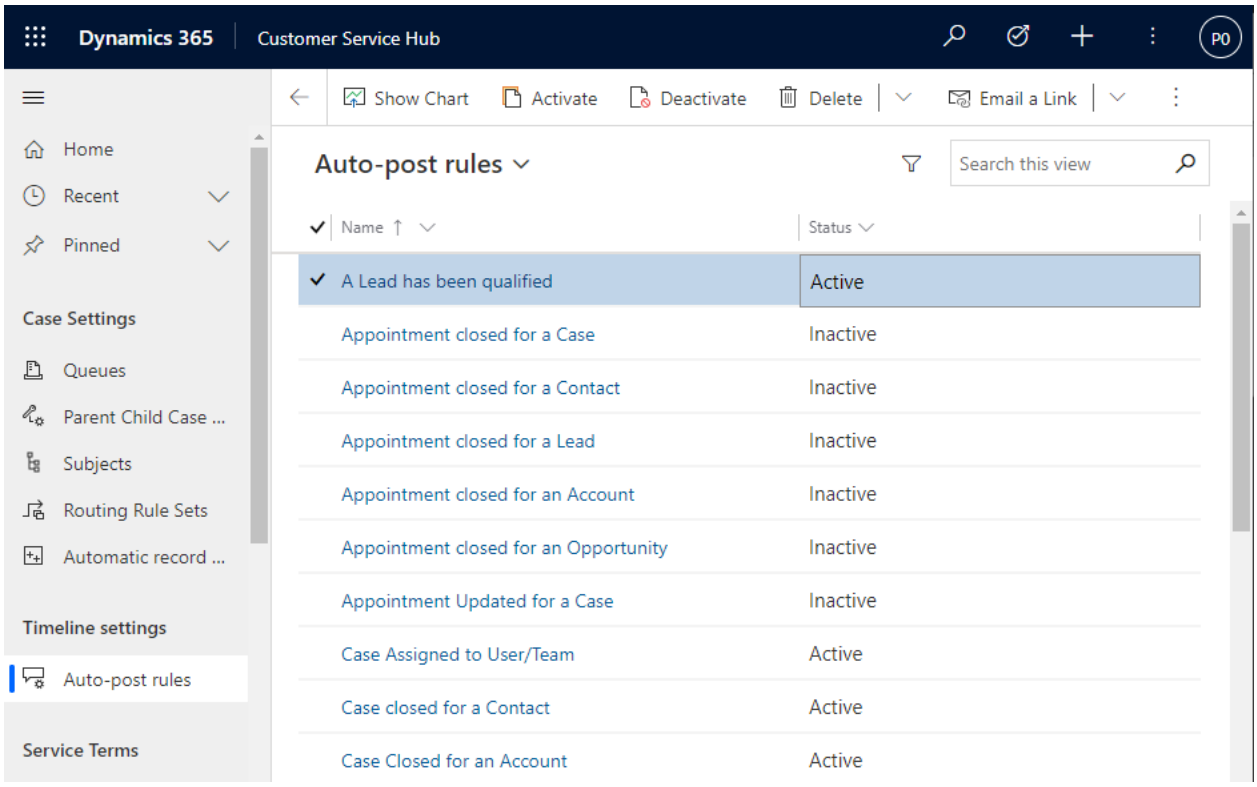
> **Note**
>
> - The autopost functionality is only available with environments that are configured for **Enable Dynamics 365 apps**.
> - Dynamics 365 incudes autopost rules for some standard tables such as account, contact, lead, and case. It is not possible to create new autopost rules. However, you can use other options such as Power Automate or a custom plug-in to create a post record based on the desired conditions.

You can configure which autopost messages appear on the timeline when a system event occurs. The autopost configuration replaces the legacy Activity Feed Configuration and Activity Feed Configuration Rules.

To configure the autopost messages that should be displayed:

1. In Customer Service Hub, go to **Service Management**, and under **Timeline settings**, select **Auto-post rules**.
2. Select which autopost rules to make active using the grid and **Activate** and **Deactivate** buttons at the top.

When a system event corresponding to an active rule occurs, an autopost message displays on the timeline.



If you're using a Dynamics 365 app other than Customer Service Hub or Customer Service workspace, you need to add your own sitemap. To add your own sitemap in your app:

1. Open your app in the app designer in **Power Apps**: make.powerapps.com
2. On the app designer command bar, select **Add page**, select **Table based view and form**, and then select **Next**.
3. In the **Table** list, select **Post Rule Configuration**, and then select **Add**.

   > **Note**
   >
   > If you don't have the Post Rule Configuration table, you're environment doesn't have the required Dynamics 365 app installed.

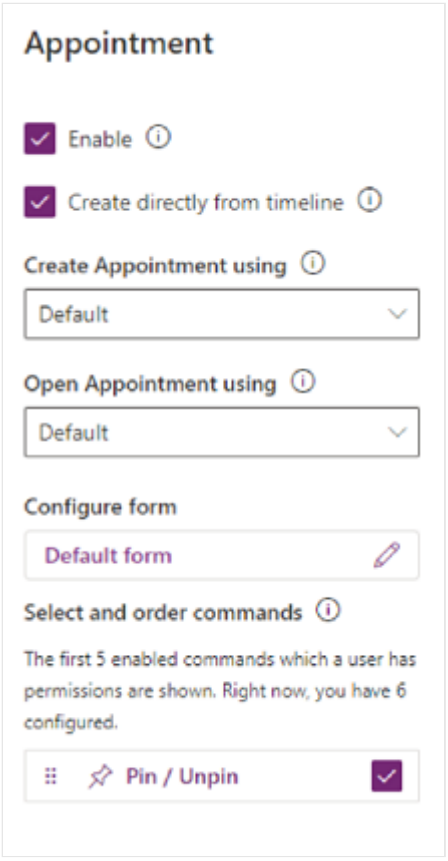
4. Select **Save**, and then select **Publish**.

Let users pin and unpin activities to the top of timeline

You can configure the ability for users to pin or unpin activities, such as notes, to the top of the timeline so that they're easily accessible. Pinning activities helps users save time by not requiring them to scroll an entire timeline to find the information they need.

By default, notes are enabled for pinning. When you click on the activity type such as a task, appointment, and so forth, the pin and unpin option appears in the list of

commands. Select the **Pin / Unpin** checkbox for each activity you want users to be able to pin or unpin.



Create and add custom activities to timeline

You can create custom tables that display on a timeline. More information: Display a custom table in a timeline

Configure blocked attachment file types

Power platform administrators can configure the file types that are blocked from being added as file attachments to records, including records in a timeline.

1. Find the **Set blocked file extensions for attachments** systems setting. More information: Open the System Settings dialog box General tab
2. In the text box of blocked file attachments, type the file extension type you want to block for attachments (for example, ".pdf"). Separate file types with a semi-colon.
3. Select **OK**.

Set file size limits for attachments

Power platform administrators can restrict the file size of attachments users can upload in the rich text editor.

> ⓘ **Note**
>
> File sizes for attachments generally can be any size under 90 MB, but for optimal system performance, smaller file sizes are recommended.

1. Go to **Advanced Settings**, and then on the Settings menu, select System > Administration.
2. On the **Administration page**, select **System Settings**.
3. On the **System Settings** dialog, select the **Email** tab, and then scroll down to find the **Set file size limit for attachments** value.
4. Enter the desired size limit for attachments, and then select **Save**. 131,072 KB is the maximum allowed value.

Known issues

Duplicate posts are shown when sorting records by older to newer

The API the timeline uses to fetch posts doesn't support sorting by older to newer posts. When you sort this way, the timeline receives the wrong posts to display. When sorting the timeline by older to newer, use notes instead.

Notes can only have one attachment added from the attachment button

This is by design, with plans to allow more attachments in the near future. Multiple attachments can be added inline by dragging and dropping them into the note.

Timeline fails to load with error `code:"0x8004430d","message":"Number of link entity: <number> exceed limit 15`

There's a limit of 15 different tables that can be associated with a timeline. Either disable some of the activities associated with the timeline, or follow one of the workarounds

described in this article: Timeline doesn't render and shows "Records couldn't be loaded"

When you create a note in a timeline, the character string "$&" is converted to "{3}amp;"

This is a configuration issue for the rich text editor control. To resolve this, add `"removePlugins": "stickystyles"` to your RTE config file. More information: Rich text editor properties

See also

FAQs for timeline control

Use the timeline control

Turn on linking of timeline notes with other table records

Article • 08/01/2023

You can use **Relate note to a table record** to perform the following actions without leaving the page that you're on:

- Move a note on the timeline of an existing table record to another table record. For example, you can move a note on the timeline of a contact to an existing case. After you move the note, it'll appear only on the timeline to which you've moved and not on both.
- Create a new table record from the note. For example, you can create a case from an existing note on a contact's timeline.

You can enable this feature for any table that allows you to add a timeline component. However, the tables that a note can be linked to are only account, contact, and case.

Configure linking of timeline notes

1. In Power Apps, select the environment that contains your solution.
2. Select **Tables**, and then select the table for which agents can link notes taken on the timeline.
3. Select **Form**.
4. Create a new form or use an existing form. More information: Create, edit, or configure forms using the model-driven form designer.
5. Select the timeline component on the form.
6. In the **Properties** > **Notes** section, perform the following steps:

    - Select **Link to Table**.
    - Select the table you want to link the note to. You can select account, case, and contact. The required table's pane appears.
    - Select **Enable** on the table's pane. If you've selected **Case**, you must specify the following:
        - **Create Case using**: the form type that opens when the agent creates a new case from the note.
        - **Configure form**: the form that is displayed when the agent creates a new case from the note.
        - **Map notes title to**: the field to which the notes title should get copied. For example, if you select **Case Title**, when you create a new case, the Case title is auto- populated with the value of the notes title.

- **Map notes description to**: The field to which the notes description should get copied to. For example, if you select **Description**, when you create a new case, the case description is auto populated with the value of the notes description.

7. Save and publish the customizations.

See Also

Learn about linking timeline notes with tables

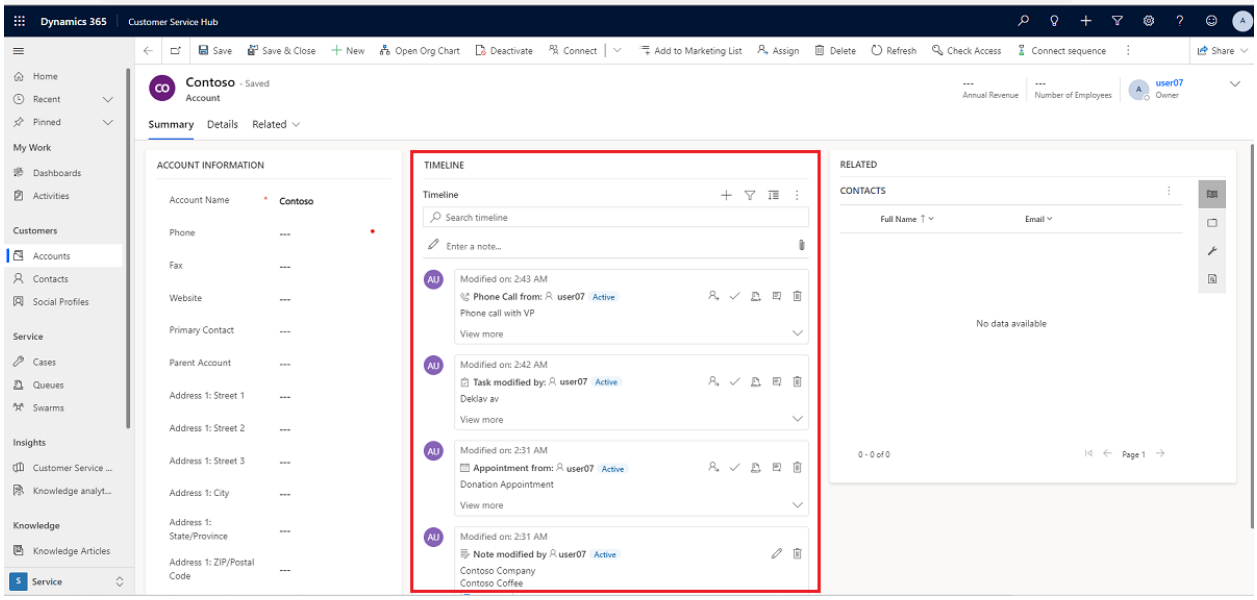
Use timeline

Article • 10/04/2023

Timeline is a modernized and optimized control that helps provide you with at-a-glance understandability when working with your customers. You can use the timeline to view information that is connected to a row in a table and occurs over time in a single stream. Some information that can be logged into the timeline includes notes and posts, in addition to displaying activities such as emails, appointments, phone calls, and tasks.

Timeline allows you to:

- Access the command bar to perform common actions quickly
- Filter and view important notes, posts, and activities using multiple filter options, and keep the filtered settings across activities
- Quickly view and manage email conversation threads with ease
- Keep detailed customer records by attaching important files and images to posts



Timeline functionality

The timeline section on the table form is intended to centralize access to information and streamline effort to accomplish actions. The following section is an overview of how the timeline functionality works in each section on the table form.

When enabled by your system administrator, you can use the icons that are displayed on the top-right navigation in the timeline for quick access to do the following actions:

- Create a timeline row
- Work with Filters

- Work with row
- Explore more commands
- Search row
- Add attachments

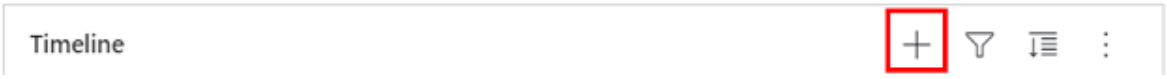
The timeline dashboard displays only the entities that are configured for the signed-in user. So, what you see on the timeline may differ from what another user sees. The signed-in user sees any rows they've followed if those rows are configured to display on the dashboard. For example, if only email and appointments are configured to display, then the signed-in user only sees email that relates to them, which can be email they've sent, email sent to them, and email they follow. The same would be true for appointments in this scenario. For more information on setting up timeline, see Set up the timeline control.

> **Note**
>
> The Notes feature isn't available from the timeline.

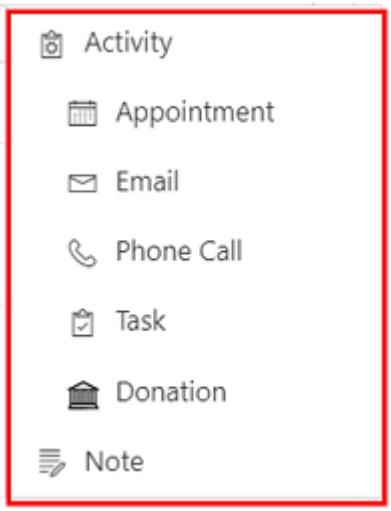
Create a timeline row

When enabled by your system administrator, you can use the **Create a timeline record** feature to quickly create appointments, tasks, send emails, and make notes and posts and associate them with other rows.

1. Select **Create a timeline record** icon.



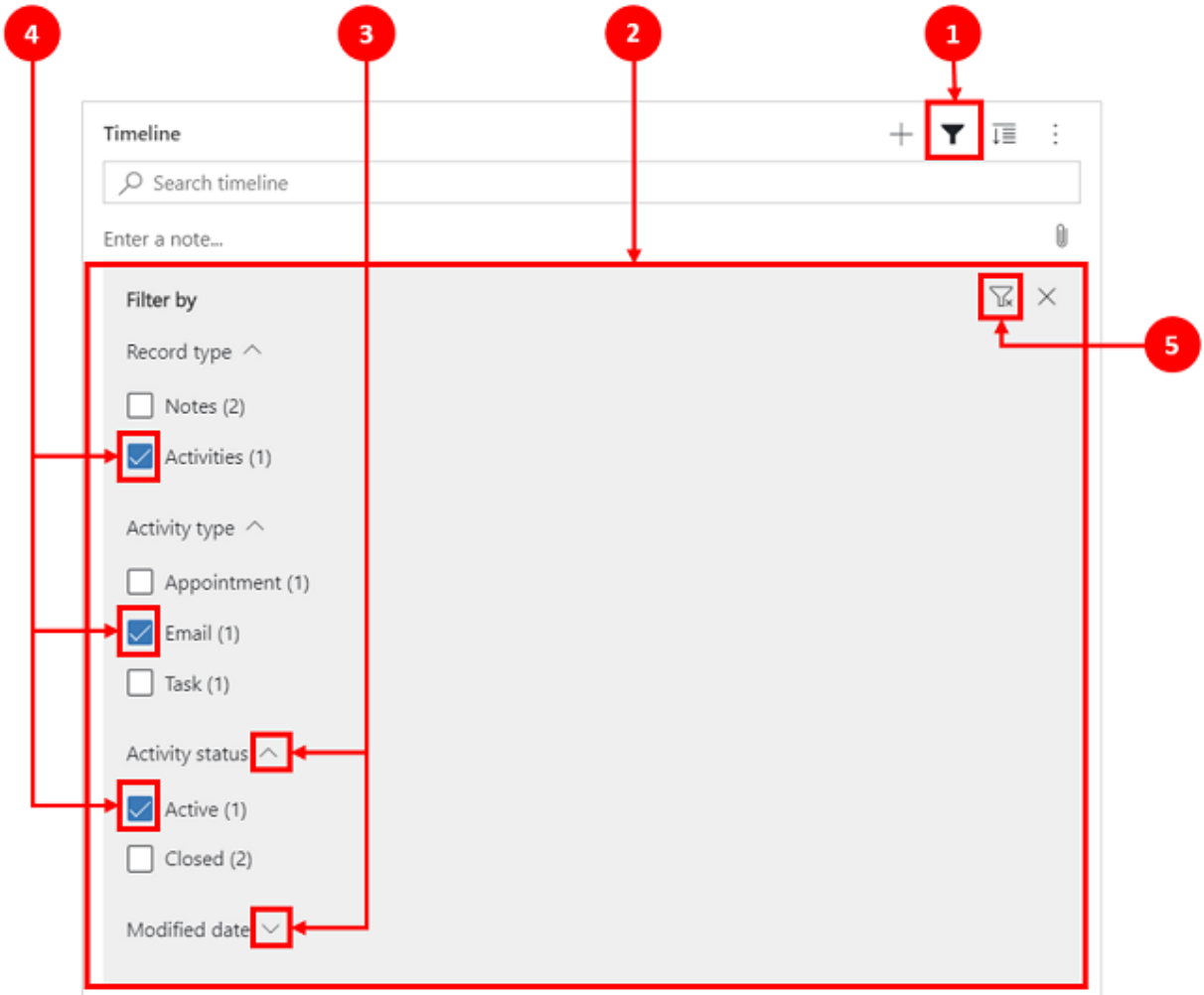
2. Select the type of row you want to create from the display options available.



For information on timeline row configuration, Set up the timeline control.

Work with filters

When enabled by your system administrator, the timeline **Filter** further streamlines your productivity by allowing you to customize your experience and view data that's relevant to you.



Legend:

1. The timeline **Filter** icon is located in the top-right navigation on the timeline.
2. The filter pane displays when the filter icon is selected.
3. Use the carats to expand or minimize selections.
4. When enabled by your system administrator, row and activity types are displayed in the filter pane. Row and activity types can be filtered by selecting the corresponding box next to the item.
5. The icon removes and clears all filter selections from the filter pane.

Filter rows on timeline

Filters are valuable for sorting data. You can easily filter through rows and activity types using multiple options to quickly see what matters to you. The filter is available for the activities, notes, posts, and custom entities that are present in timeline.

Filter icon display

- When the **Filter** icon displays as a transparent , it means the filter pane is empty and nothing has been applied.
- When the **Filter** icon displays as dark , it means filters are applied.

Filter options

The following category and subcategory options are available on the filer menu:

Category	Subcategory
Row type	• Notes • Posts • Activities
Activity type	• Appointment • Campaign Activity • Campaign Response • Email • Fax • Case Resolution • Letter • Opportunity Close • Order Close • Phone Call • Quote Close • Recurring Appointment • Social Activity • Task • Project Service Approval • Booking Alert • Conversation • Session • Customer Voice survey invite • Customer Voice survey response • Custom activities (as configured by your system administrator)
Activity status	• Active • Overdue • Closed
Activity due date (active)	• Next 30 days

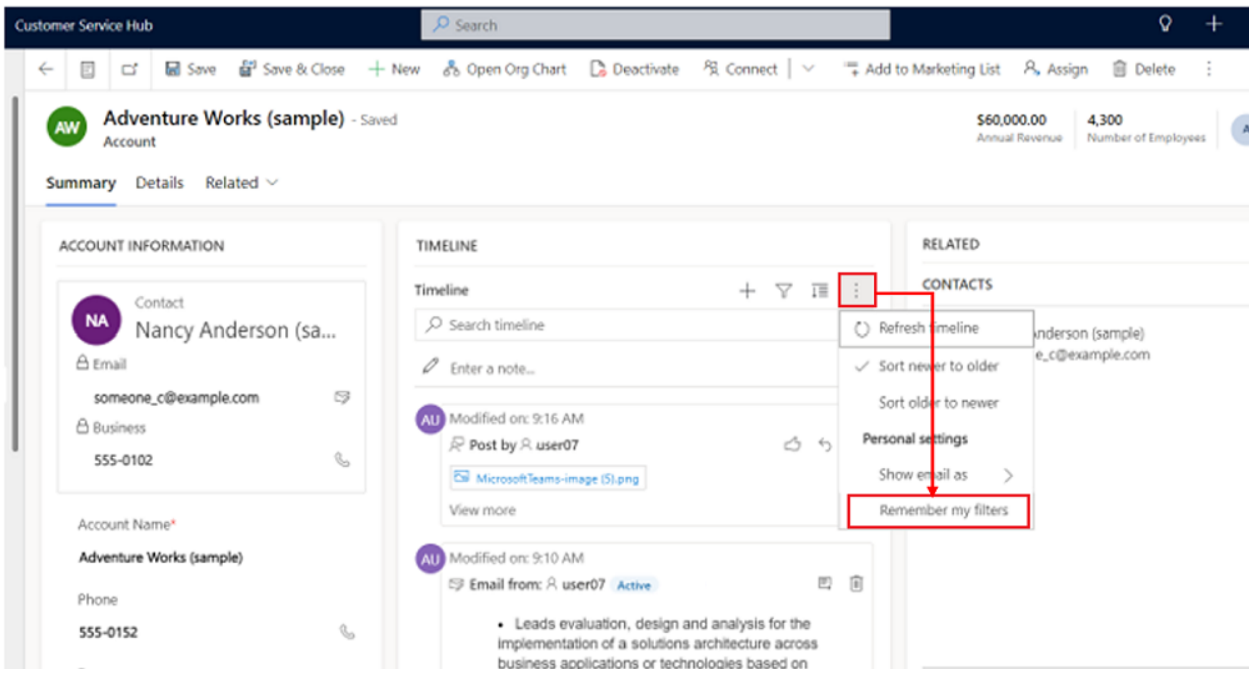
Category	Subcategory
	• Next seven days • Next 24 hours • Last 24 hours • Last seven days • Last 30 days
Posts by	• Auto post • Users
Modified date	• Last 24 hours • Last seven days • Last 30 days

Save filter settings

You can choose to save your filter settings so that you don't have to set them again each time you work with activities in the timeline.

To save your filter settings, after configuring the filters you want, select the ellipses, and then select **Remember my filters**.

> **Note**
>
> If you have a system administrator or basic user role, Remember my filters works by default. If you don't have either of these roles, you must have Create/Read/Write privileges to be added to the msdyn_customcontrolextendedsettings table for the setting to work.

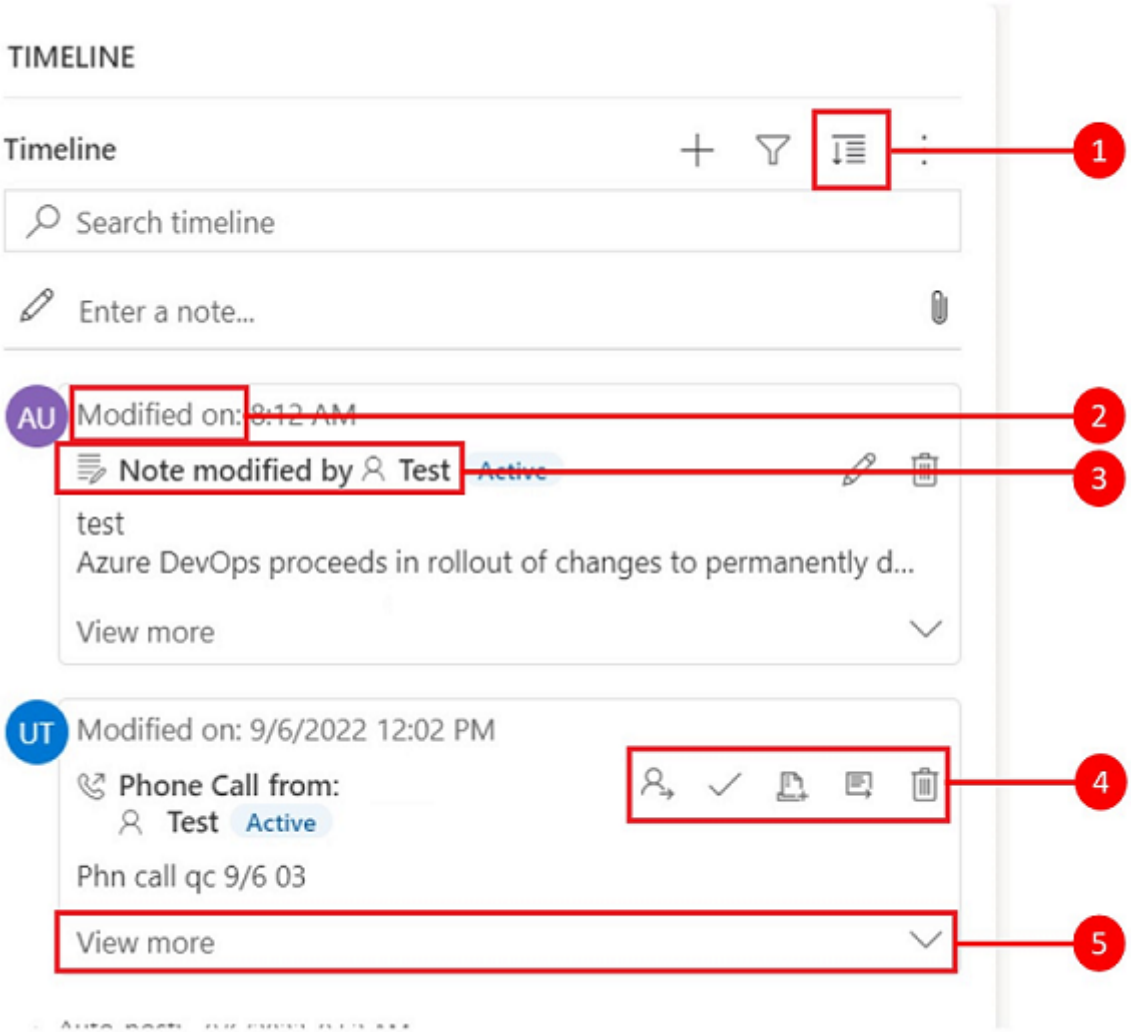


Work with rows

When working with rows, you can view key information at a glance or expand rows to view more details. When you hover over a row, actions display that you can use.

Expand all rows

When enabled by your system administrator, you can view timeline rows quickly in a collapsed format or expand a row to see more details for ease of use.



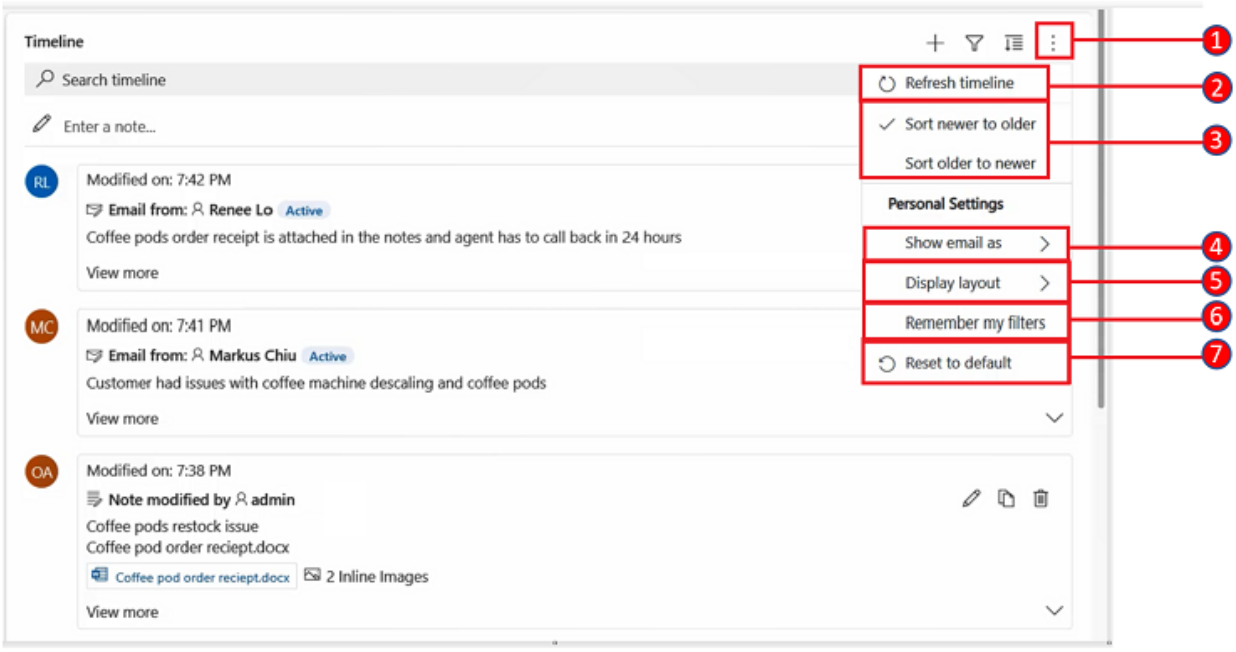
Legend

1. The **Expand all records** icon is used to expand all rows listed on the timeline.
2. The **Modified on** timestamp displays the time the record was last updated.
3. Each row has a list of commands relevant to their row type that displays in the top right corner for ease of use.
4. Row backgrounds change to grey when you hover over it, and it becomes transparent again when you move the mouse away.

5. The carats in the bottom-right corner of each row allow you to expand (^) or minimize (v) the display views.

More commands

The **More commands** option contains refresh, sort, and email functionalities.



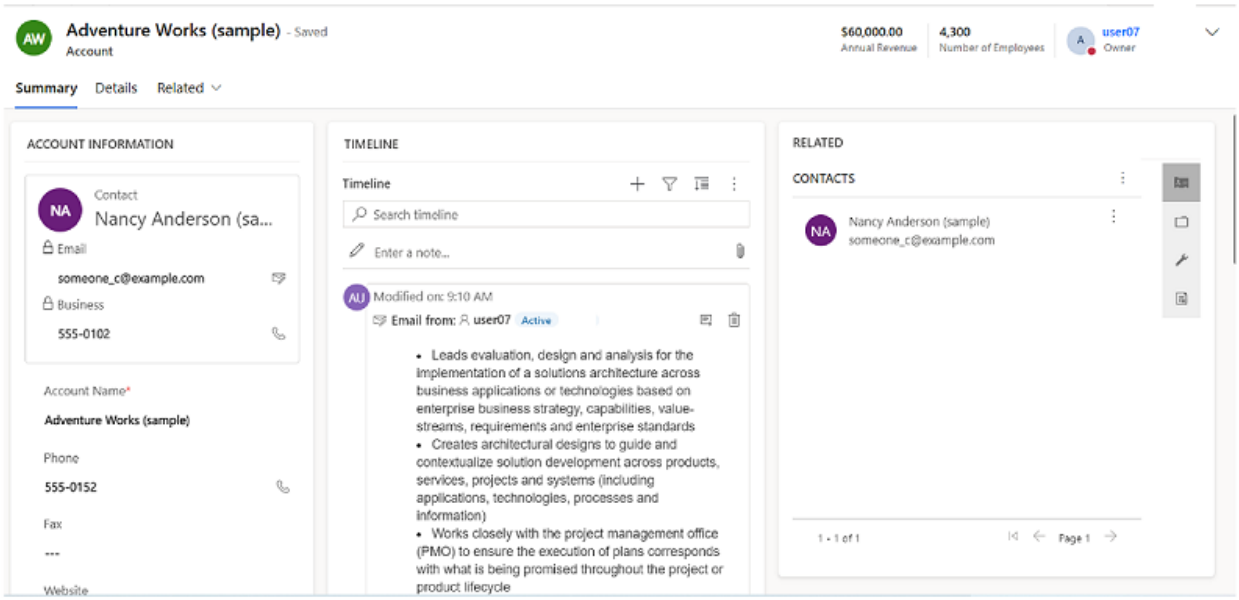
Legend

1. The **More commands** icon, when expanded, provides more functionality options.
2. The **Refresh timeline** command updates row details in the timeline.
3. The **Sort newer to older** or **Sort older to newer** command is used to sort rows.
4. The **Show email as** command is used to enable or disable threaded email views.
5. The **Display layout** command allows you to choose from two different views: **Roomy** or **Cozy**. **Roomy** (set by default) shows you more information, such as profile details, and adds space between the rows. **Cozy** hides some of the details, such as icons, and compacts the space between rows.
6. The **Remember my filters** command allows your filters to persist when you close the record so that they continue to be applied across sessions.
7. The **Reset to default** command reverts all of the command settings you've changed back to the default settings.

View email inline in timeline

If preferred, you can view email messages inline on the timeline rather than open them as separate pages.

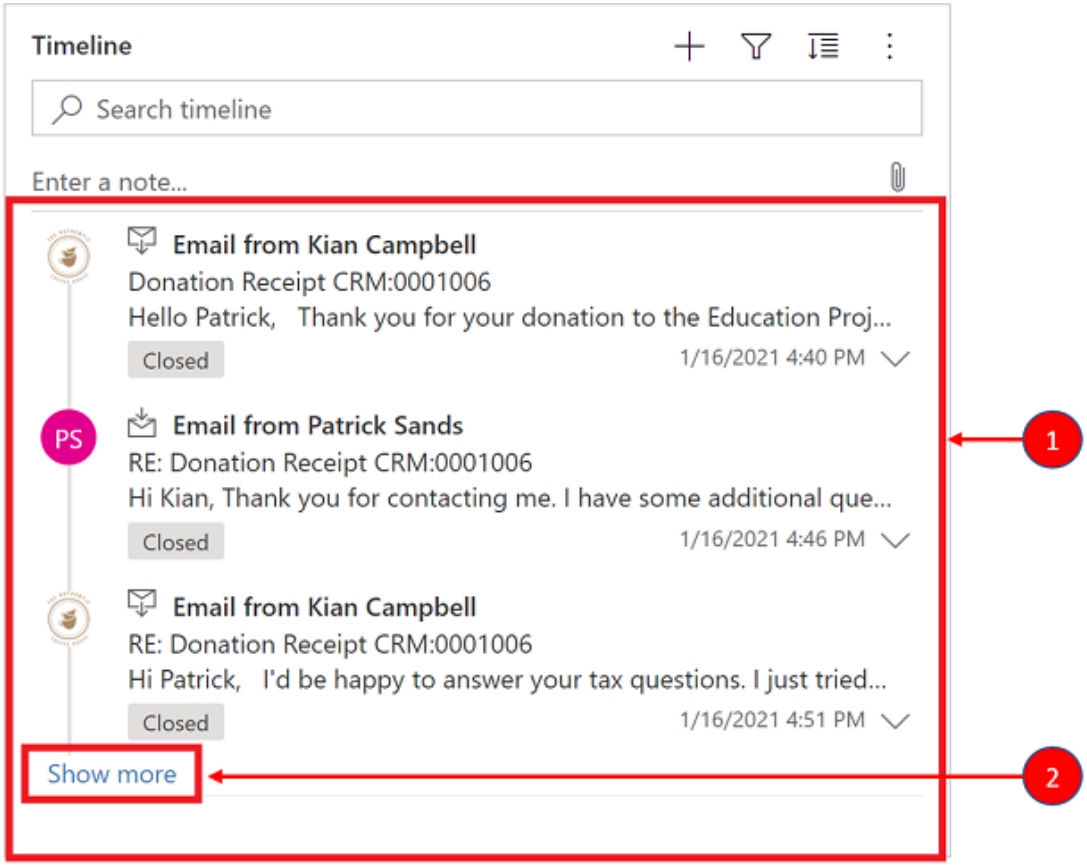
To view an email directly in the timeline, on the row, select **View more**. The email is displayed on the same form. When you're finished viewing the email, you can collapse the screen and return to the previous view of the form.



Threaded email views in timeline

Use the threaded email view option to save valuable space when you have emails with multiple replies. This view consolidates email threads when collapsed.

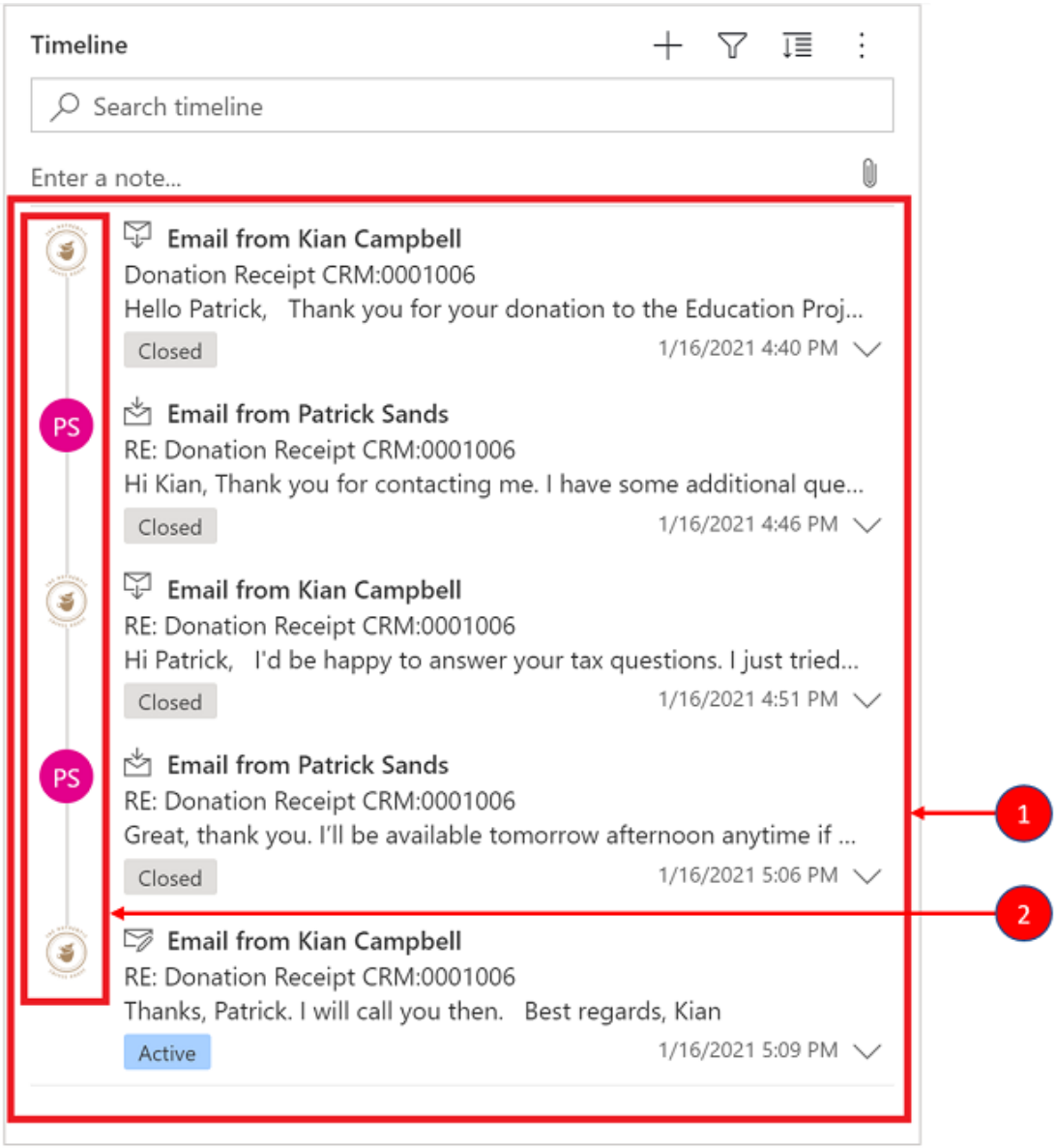
Collapsed threaded email view



Legend

1. When enabled using the **Always show email as conversations** option under **More commands** ⋮, emails with multiple responses are grouped together into threaded emails.
2. The **Show more** link appears in the bottom-left corner of the last visible email in the thread to view the complete string of email responses.

Expanded threaded email view



Legend

1. When expanded, the most recent 10 email responses in the thread display. To display more, select **Show more** to expand the view again.
2. Emails in the same thread are displayed as being linked together.

Enable threaded email views in timeline

Enabling the threaded email view is done via the timeline configuration in Power Apps. Threaded email views must be done in this setting for the specific table, in the specific form, for each specific timeline.

Threaded email views can be enabled in timeline via two options:

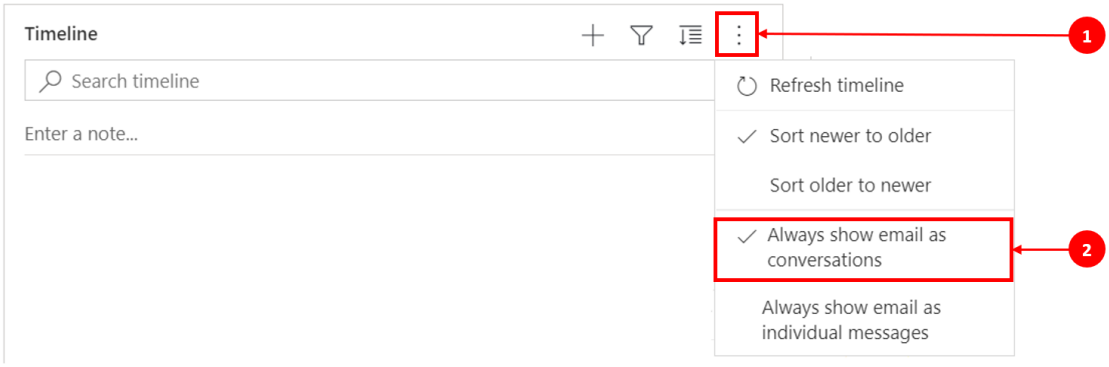
Option 1:

You can enable the threaded email view using the **More Commands** feature, located on the right-hand side of the timeline.

Enable threaded email through the More Commands option

Steps:

1. Use the **More commands** icon on timeline that displays a flyout menu.
2. Select **Always show email as conversations** to thread and group all emails in that specific timeline.



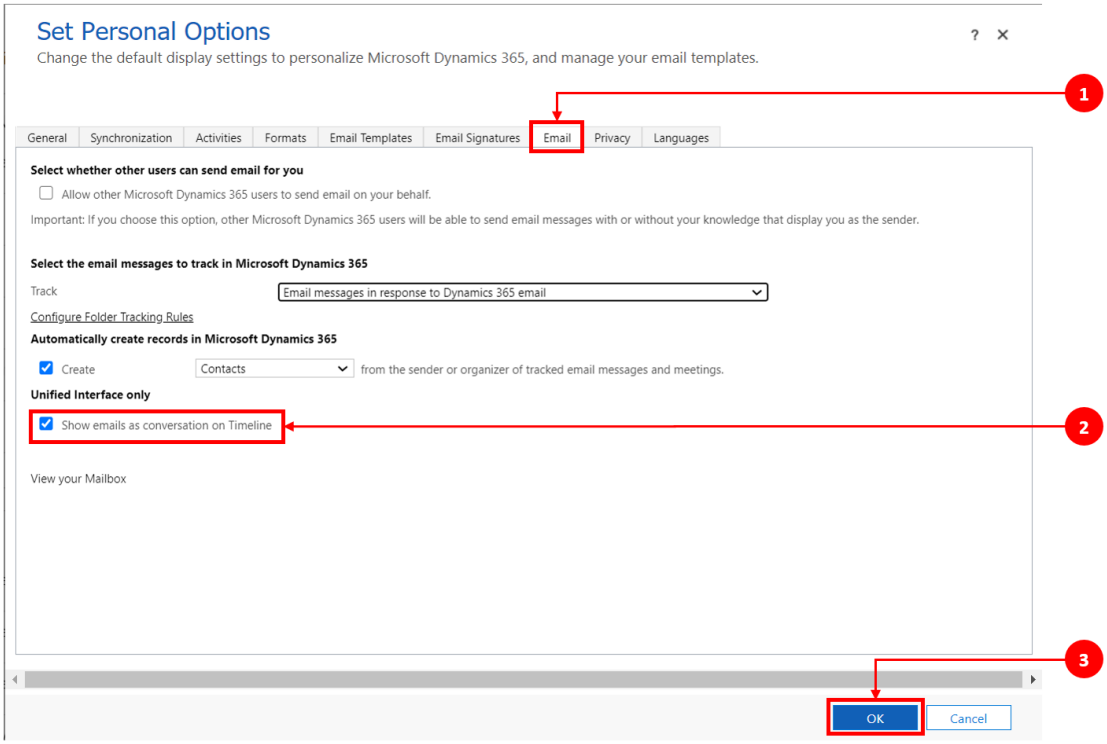
Option 2:

Enable threaded email through Personal Options setting

To enable threaded email via this option, go to the command bar and select **Settings**, then **Personalization Settings**. The **Set Personal Options** dialog box is displayed so you can use the following steps to enable the threaded email view on timeline.

Steps:

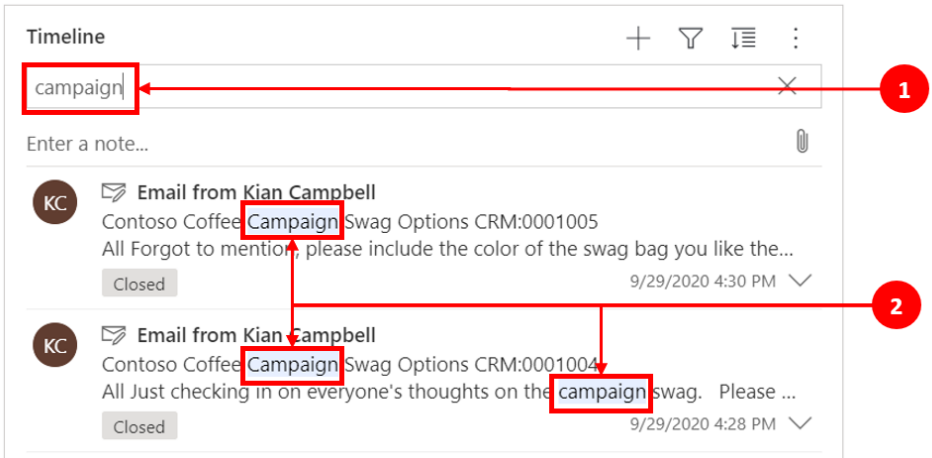
1. Select the **Email** tab.
2. Select the **Show emails as conversation on Timeline** check box.
3. Select **OK**.



> **Note**
>
> The **emails as conversation** view is based on the user's preference. Personal settings are tied to the user, not the form, which means when you enable the threaded email view, the setting is applied to all of your timeline views.

Search rows on timeline

When enabled by your system administrator, you can easily search for rows in the timeline. When you search for a phrase in the timeline, it searches in the title, subject of the row, body, or description fields of the row and displays the row for you.



Legend

1. The **Search** bar allows you to quickly find rows using keywords or phrases that the search feature retrieves and displays below the search bar.
2. Keywords that are used are highlighted.

Work with notes and posts

Notes allow you to record richly formatted information and images for reference, summary, or investigation. You can easily add a mention to another user or a reference to a timeline row. The mention capability is available in timeline only when rich text notes and rich text posts are enabled.

When you type the @ symbol, the results you see are matches with the first name, last name, or email address of system users starting with your search string. When you mouse over the profile image, you can view the user's detailed profile card and online presence status. More information: View the profile card for a contact or user.

When you type the # symbol, the results you see are matches with the account and contact name table rows starting with your search string.

Add a note or post to a row on timeline

When enabled by your system administrator, you can either add a note or a post to a row on timeline. Each note and post has a maximum size limit of 100,000 characters.

You can also enter a note and add it to a row, but you can only add one attachment per note. If your administrator hasn't enabled note, you can't add an attachment.

Note display view

When enabled by your system administrator, the **Note** field is displayed under the **Search** feature on timeline.

Post display view

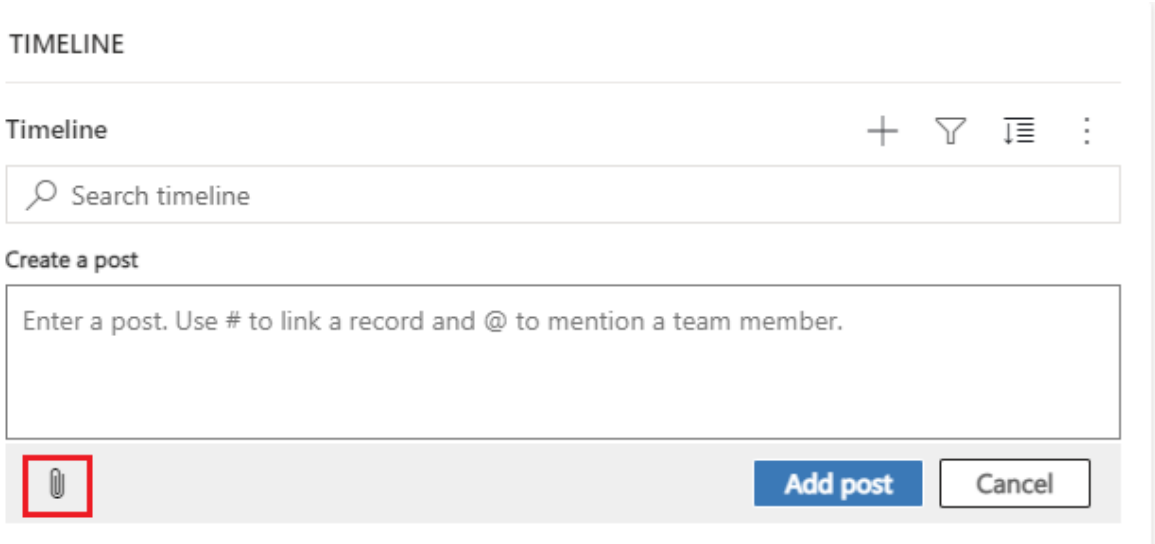
When enabled by your system administrator, the **Post** field is also displayed under the **Search** feature on timeline.

Add an attachment to a post

You can add an attachment to a post, such an image or a document. The supported file formats are as follows: .JPG, .PNG, and .PDF.

To add an attachment to a post:

1. In the **Create a post** section in the timeline, select the **Attach** icon in the lower-left corner.

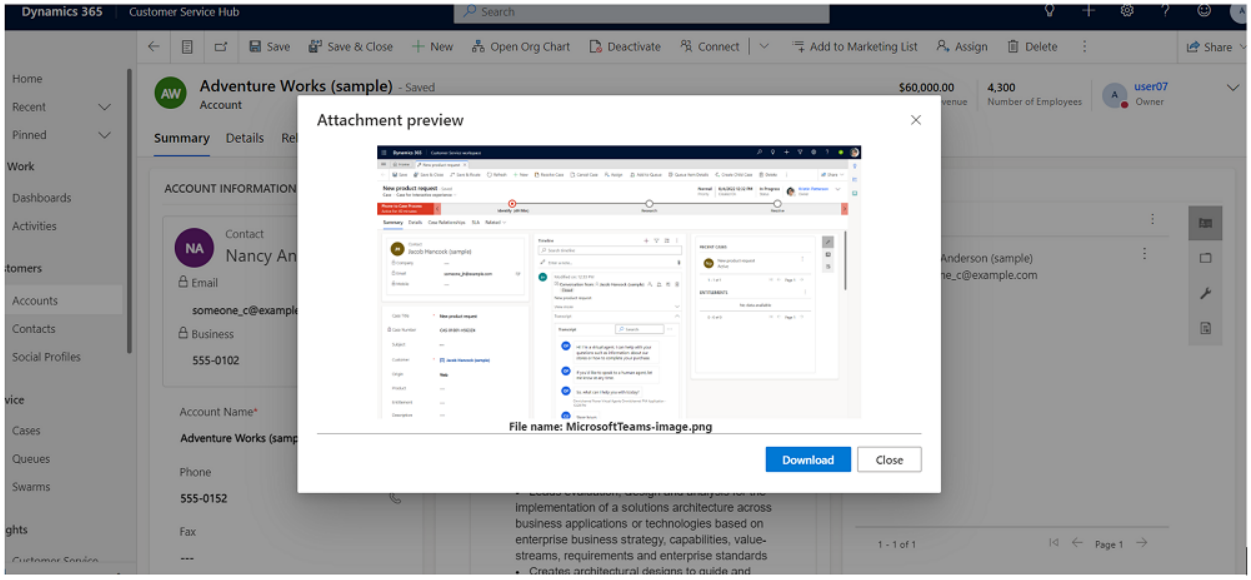


2. Browse to the file you want to attach to the post, and then select it.

3. Finish the edits you want to make to your post, and then in the timeline, select **Add post**.

Preview an attachment in the timeline

You can view previews of attachments in the timeline if they are in the supported file format (.JPG, .PNG., or .PDF). Any attachment that is viewable inline on the timeline can be downloaded, whether or not a preview is available.



To preview an attachment in the timeline, do either of the following steps:

In edit mode:

1. Right-click the attachment, and then select **Preview**. The **Attachment preview** dialog opens with the attachment displayed. You can view and download the attachment from the dialog.
2. When you're finished viewing the attachment, select **Close** to return to the note or post.

OR

In read mode:

1. Select the attachment. The **Attachment preview** dialog opens with the attachment displayed. You can view and download the attachment from the dialog.
2. When you're finished viewing or downloading the attachment, select **Close** to return to the note or post.

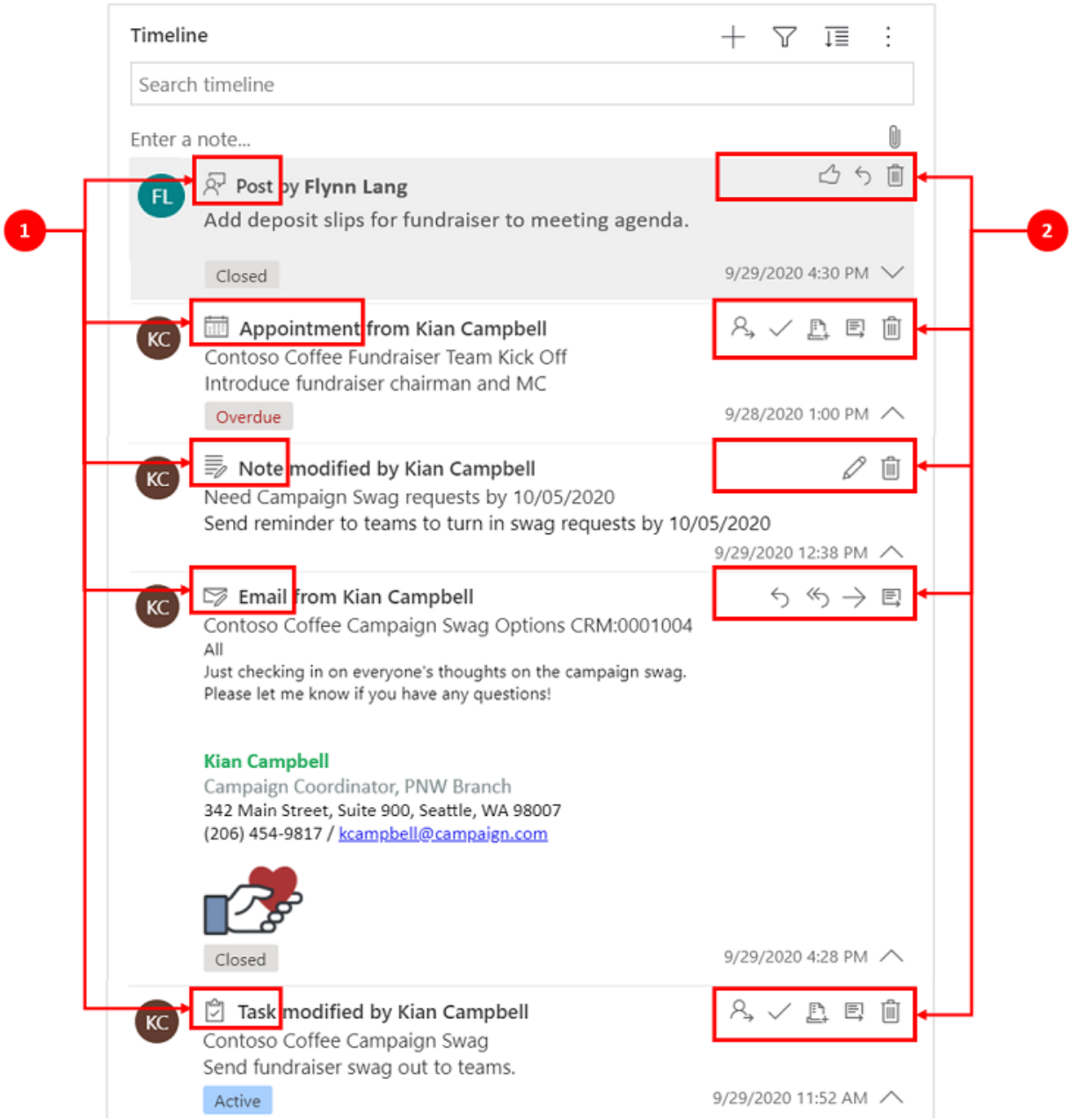
> ⓘ **Note**
>
> The use of the **Attachment preview** dialog to view the file can be skipped in the browser by using **Ctrl + Left click (of mouse)**. By doing so, the attachment is directly downloaded without previewing it.

Access the command bar to perform actions

When you hover your cursor on or expand an activity, post, or note, the command bar appears in the top-right corner of the row with the specific options that support that activity, such as assigning it to others, adding it to a queue, converting it to a case, liking

or replying to a post, editing a note, or deleting an activity. However, not all rows can perform the same actions.

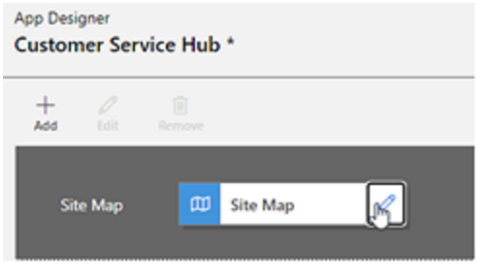
Command actions by row



Legend

1. Only the actions associated with that row are displayed in the top-right command bar displayed in the row.
2. Each row displays a different set of associated actions. Not all actions work on all rows.

The following table is an overview of the command bar icons and the actions they support:

Icon	Name	Description
	Assign	Lets you assign a task.
	Close Activity	Lets you close the activity row.
	Add to Queue	Lets you add a task to a queue.
	Open Row	Lets you open a row.
	Delete	Lets you delete the row.
	Reply	Lets you reply to an email. **Note**: This command is only available for Email.
	Reply All	Lets you reply to all for an email. **Note**: This command is only available on Email.
	Forward	Lets you forward an email. **Note**: This command is only available on Email.
	Like this post	Lets you like a post. **Note**: This command is only available on Posts.
	Edit this note	Lets you edit a note. **Note**: This command is only available on Notes.

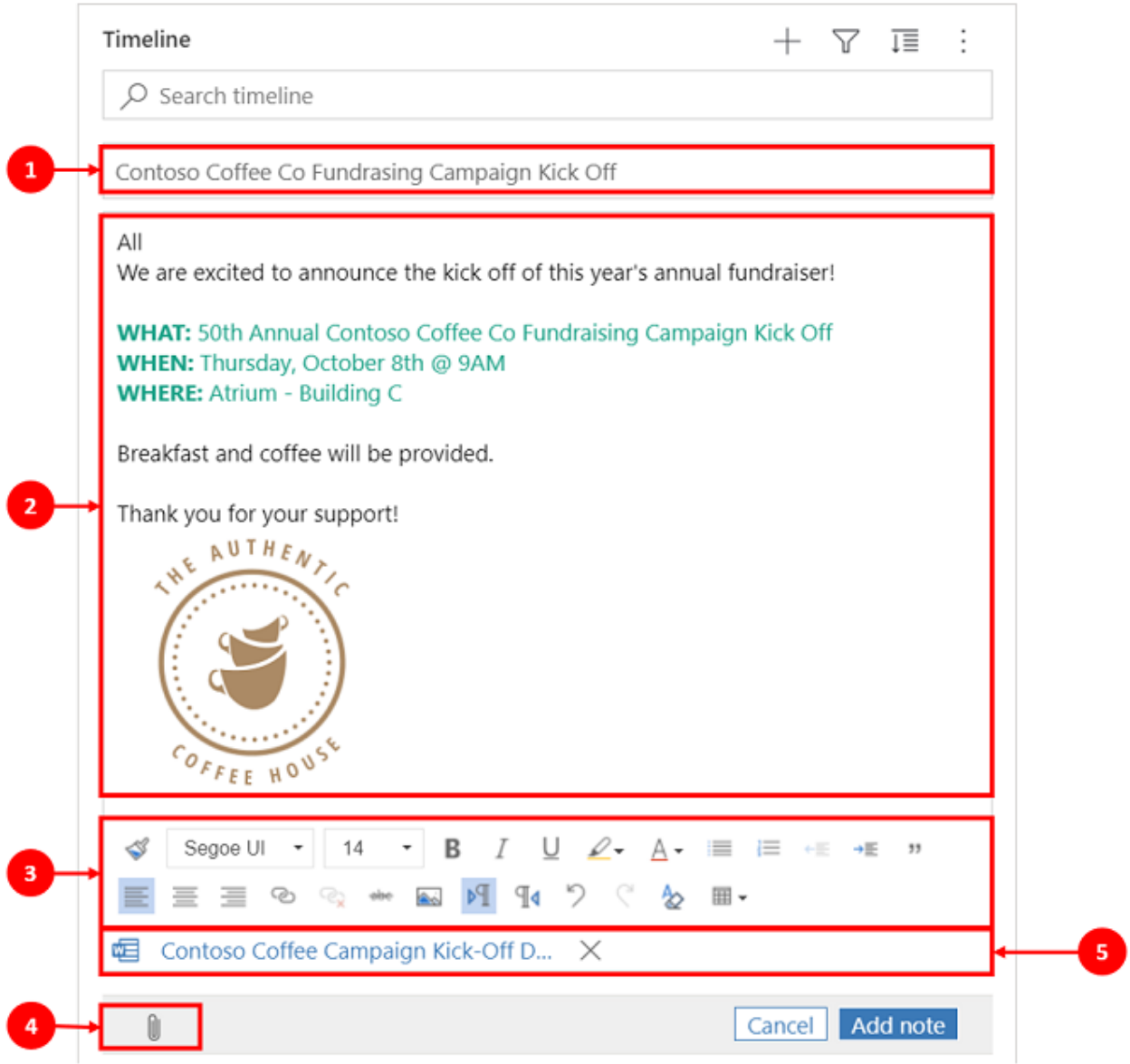
The following table is an overview of the default command bars for frequently used activities, notes, and posts:

Activity	Command bar icons	Notes
Email (draft)	Open Row, Delete	
Email	Reply, Reply All, Forward, Open Row	
Appointment	Assign, Close Activity, Add to Queue, Open Row, Delete	
Appointment (closed)	Assign, Add to Queue, Open Row, Delete	

Activity	Command bar icons	Notes
Task	Assign, Close Activity, Add to Queue, Open Row, Delete	
Task (closed)	Assign, Add to Queue, Open Row, Delete	
Phone Call	Assign, Add to Queue, Open Row, Delete	
Note	Edit, Delete	
Post (user)	Like, Reply, Delete	Only the author of the post has the ability to delete it. The author always has the ability to delete regardless of user privilege.
Autopost	Like, Reply, Delete	

Work with notes

The **Note** message box has a rich text editor that enables you to use rich text and create well-formatted content.



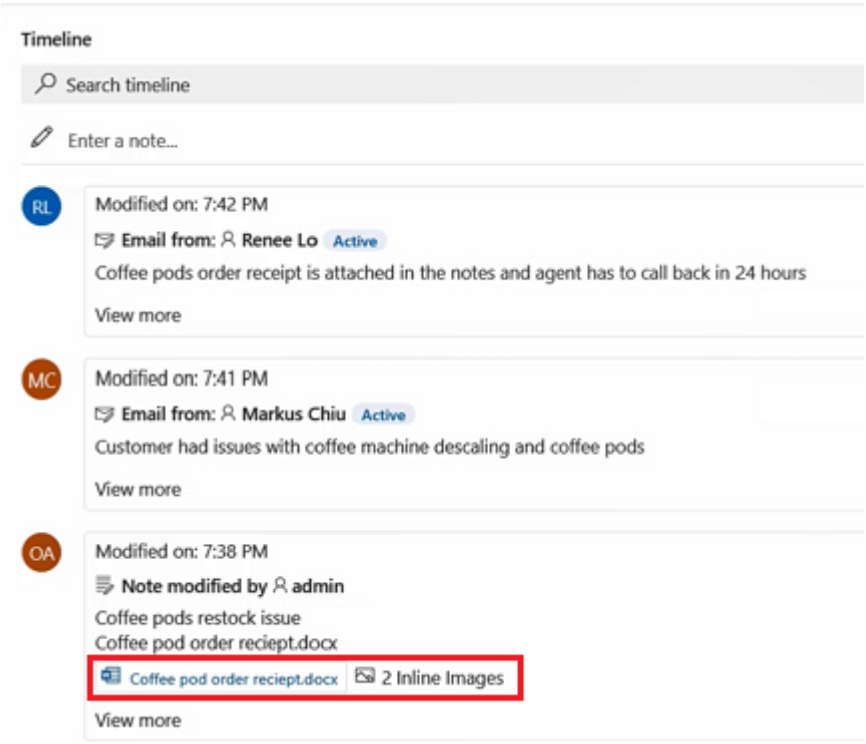
Legend

1. Note title field for adding headings and subjects.
2. Notes have a rich text editor so you can format and structure your messages.
3. The rich text editing tool expands to a full menu for quick access to formatting features.
4. The paperclip is used to attach files to your note.
5. Attached files are displayed at the bottom of the note.

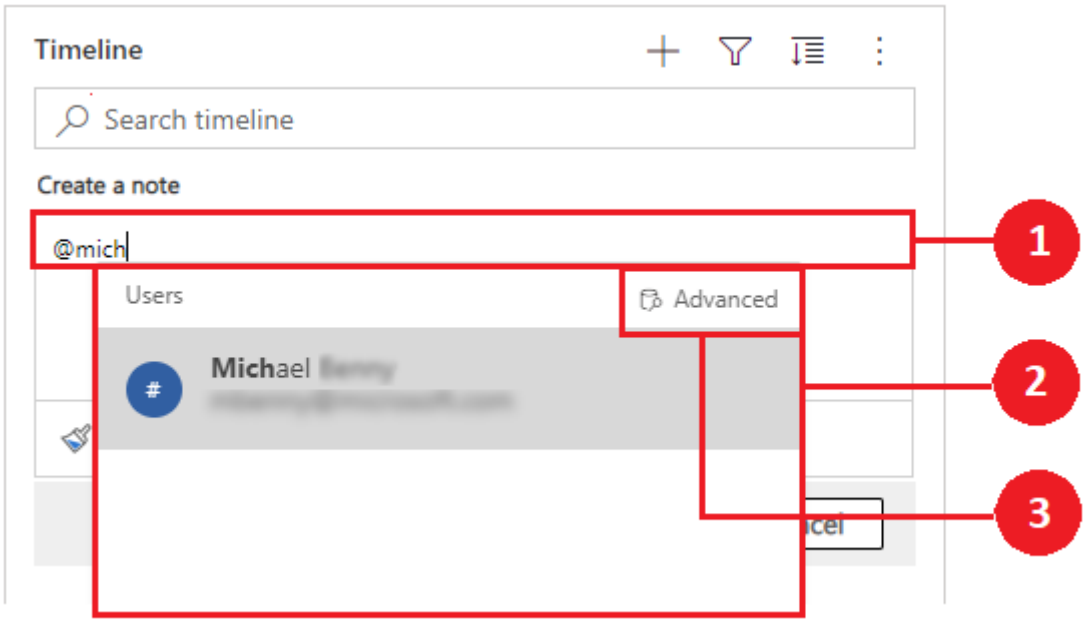
> **Note**
>
> - Only **Notes** have rich text capability, and they're only available in the timeline.
> - You can only format the message body of a note; not the title.
> - The rich text editor is available only for Unified Interface.
> - If you create a rich text editor note in Unified Interface and then view the note in the web client, it displays in HTML syntax.

View whether a note has attachments and inline files in the timeline

If you attach a file to a note or include an inline image in the note, the timeline shows that the note has an attachment or inline files. If you attach a file or include multiple files inline, the note shows the number of files using the first two file names and a number to represent the remaining count of and the file type.



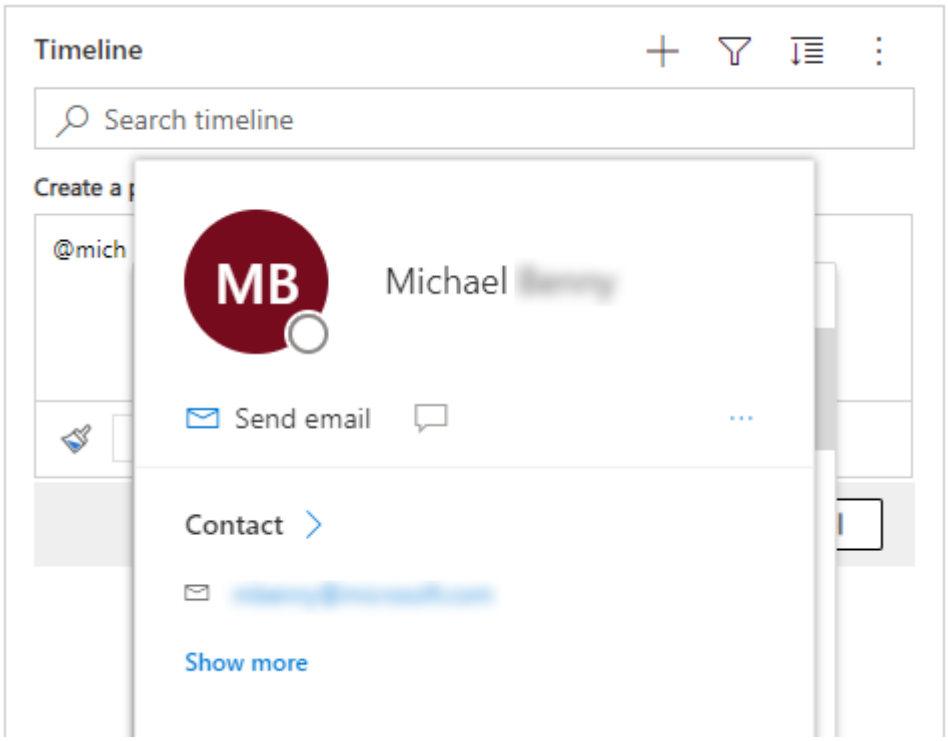
Add a mention or reference a team member in a note



Legend

1. Typing the @ sign in the **Note** field displays a flyout menu with a list of users that have been recently used.
2. If the user row isn't displayed, typing the name after the @ sign refreshes the rows in the flyout menu using the **Quick Find** search engine that's operating in the background.
3. Switch views using **Advanced** to display the **Lookup Records** pane. In the **Lookup Records** pane, you can switch between the **Recent records** and **All records** view to search rows.

When you mouse over the profile image, you can view the user's detailed profile card and online presence status.



> **Note**
>
> You can mention only a system user in a note. For example, a team member within your organization.

Add an attachment to a note in timeline

When enabled by your system administrator, you can add an attachment, such as a file, to a note in timeline to share with users. Any attachment that is viewable inline on the timeline can be downloaded, whether or not a preview is available.

> **Note**

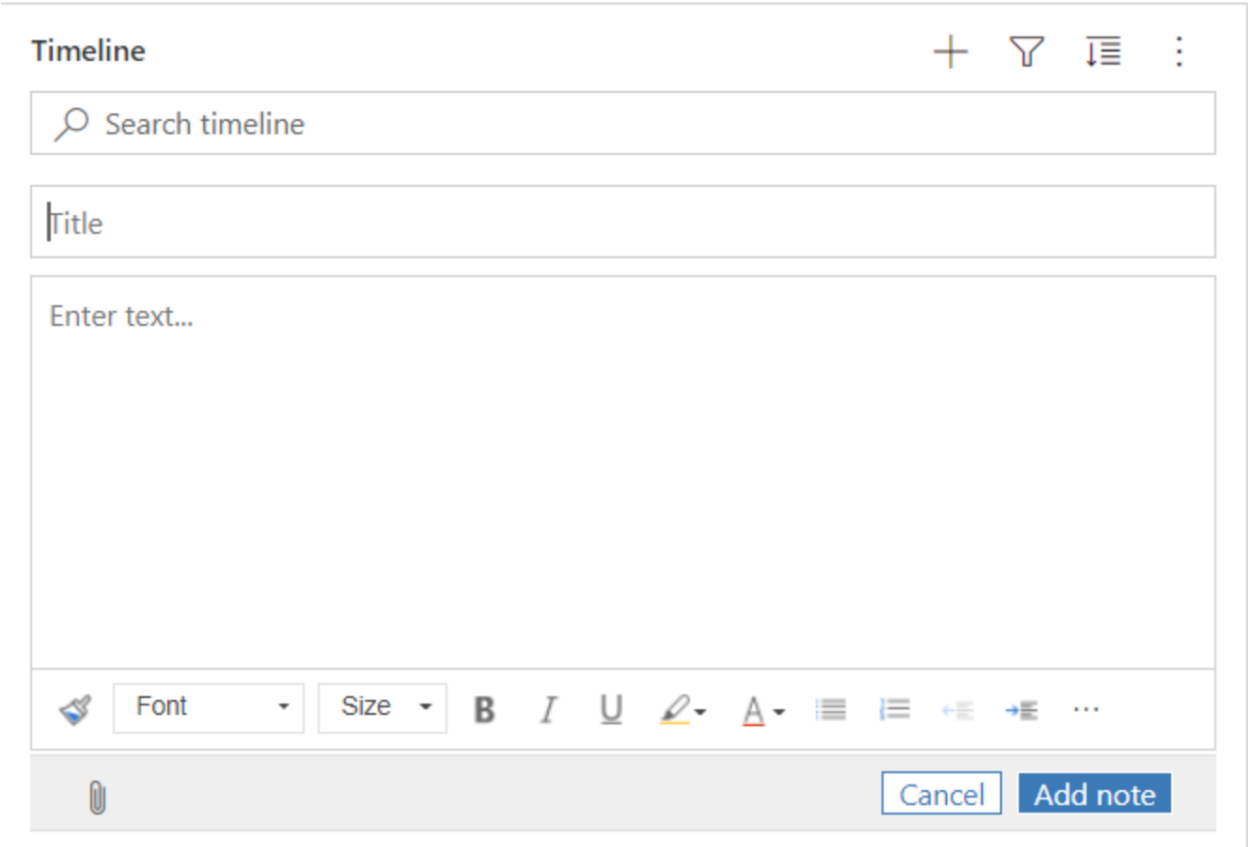
- The list of allowed attachments is configured by your system administrator.
- On iOS and Android you can only select and attach a picture or video.

Select the paperclip icon to attach a file to a note.

Edit Note

When you attach a file to your note, the **Edit note** screen displays, and attachments show at the bottom of the **Edit note** screen.

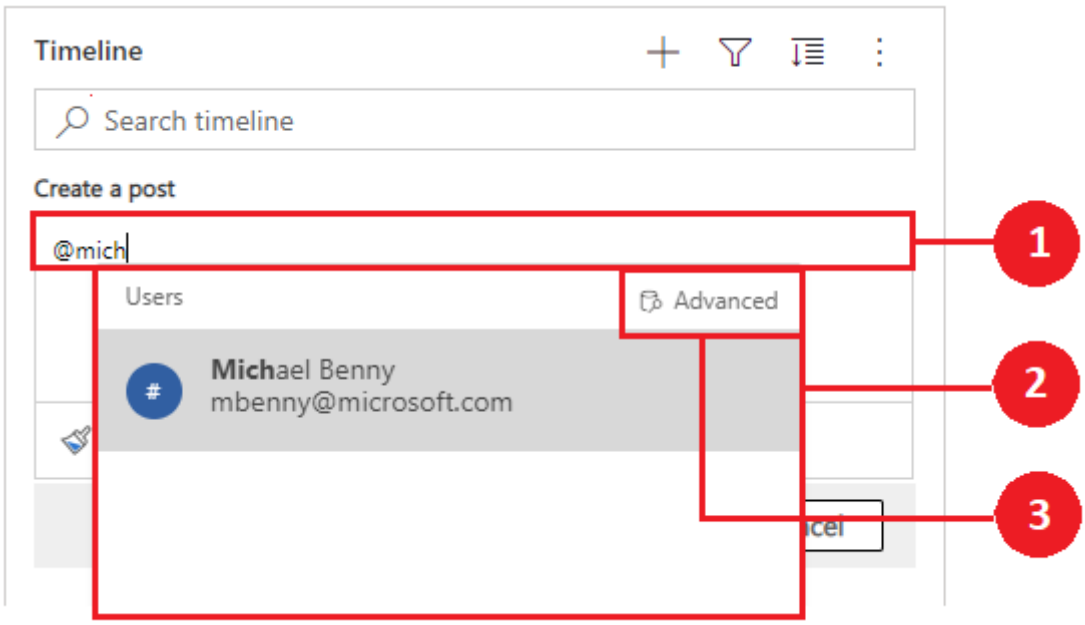
> **Important**
>
> You can only add one file attachment per note.



Work with posts

When enabled by your system administrator, you can either add a post to a row or mention to another user or timeline.

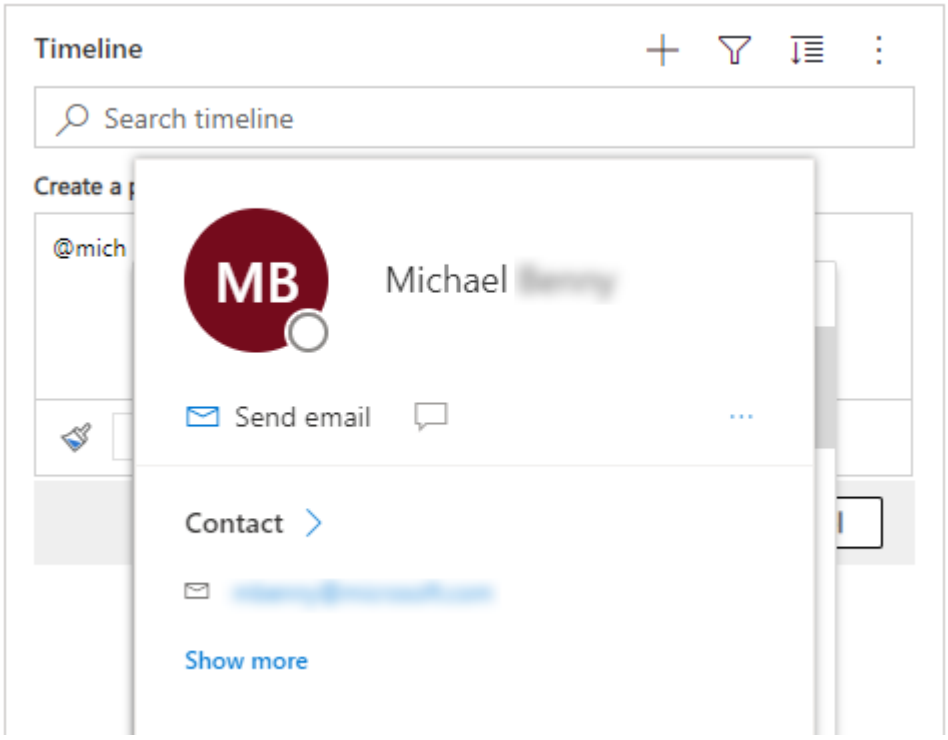
Add a mention or reference a team member in a post



Legend

1. Typing the @ sign in the **Post** field displays a flyout menu with a list of users that have been recently used.
2. If the user row isn't displayed, typing the name after the @ sign refreshes the rows in the flyout menu using the **Quick Find** search engine that's operating in the background.
3. Switch views using **Advanced** to display the **Lookup Records** pane. In the **Lookup Records** pane, you can switch between the **Recent records** and **All records** view to search rows.

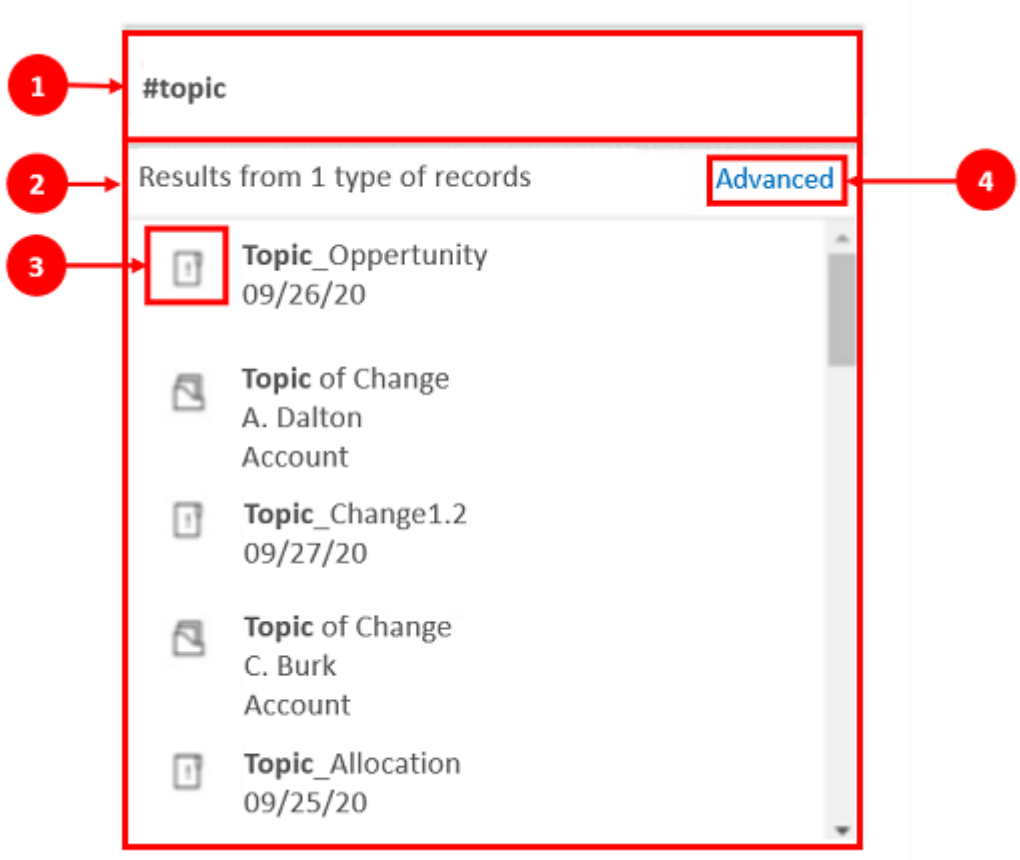
When you mouse over the profile image, you can view the user's detailed profile card and online presence status.



> **Note**
>
> You can mention only a system user, i.e. a team member within your organization, in a post.

Add references in a post in timeline rows

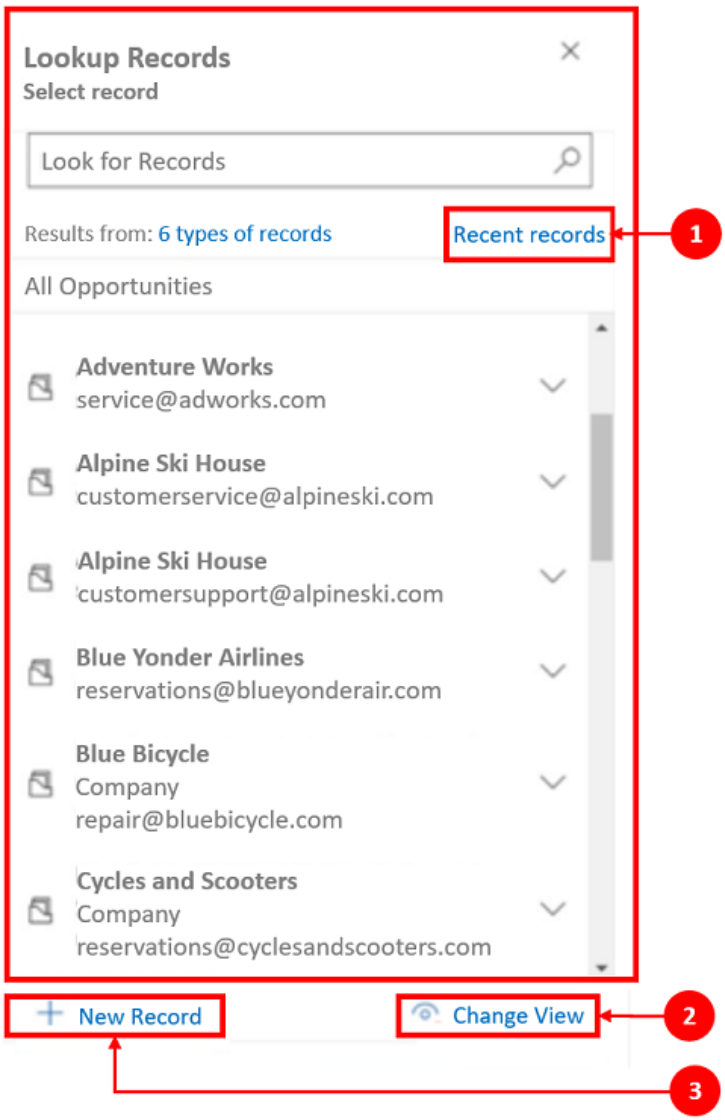
To add a reference such as links in a post to a timeline row, select the + icon, select **Post**, and then complete these steps:



Legend

1. Links can be added to a row by typing # which displays a flyout menu with a list of rows recently accessed. Type a keyword after the # tag and the display refreshes in the flyout menu via the **Quick Find** search engine that's operating in the background.
2. Rows displayed can be of any row type, such as accounts, contacts, or leads.
3. The icons beside the row names in the flyout menu indicate the row types, which help you determine which row to select.
4. **Advanced** provides more options when a row can't be located by allowing the user to switch to a different view or create a new row.

Look up rows in posts in timeline



Legend

1. The **Lookup Records** pane provides users with options to switch between the **Recent records** and **All records** view to find a row.
2. **Change View** to see rows from a different view.
3. **New Record** allows you to create a new row if you can't find the row you need.

For more information on notes and post functionality and configuration, see: Set up the timeline control

Use the rich text editor toolbar

The rich text editor toolbar provides features and functionality that allows you to work with rich text format in notes.

Formatting options

The following table describes the different formatting features and functionality options that are available in the rich text editor that you can use in notes.

> **Note**
>
> You can access your browser's context menu by selecting **Ctrl + right-click**. This setting is useful if you need to use your browser's built-in spellchecker. Otherwise, you can right-click to provide contextual formatting for any element you are using.

Icon	Name	Shortcut key	Description
	Format Painter	Ctrl+Shift+C, Ctrl+Shift+V	Apply the look of a particular section to another section.
	Font	Ctrl+Shift+F	Select a font of your choice. The default font is Segoe UI. **Note**: When you select any formatted content, the font name for that content displays. If your selection contains multiple fonts, the topmost font name of your selection is displayed.
	Font size	Ctrl+Shift+P	Change the size of your text. The default size is 9 pt. **Note**: When you select any formatted content, the font size for that content displays. If your selection contains multiple font sizes, the topmost font name of your selection is displayed.
	Bold	Ctrl+B	Make your text bold.
	Italic	Ctrl+I	Italicize your text.
	Underline	Ctrl+U	Underline your text.
	Text Highlight Color		Make your text stand out by highlighting it in a bright color.
	Font Color		Change the color of your text.
	Bullets		Create a bulleted list.
	Numbering		Create a numbered list.
	Decrease Indent		Move your paragraph closer to the margin.

Icon	Name	Shortcut key	Description
	Increase Indent		Move your paragraph farther away from the margin.
	Block Quote		Apply a block-level quotation format in your content.
	Align Left	Ctrl+L	Align your content with the left margin. (Commonly used for body text to make it easier to read.)
	Align Center	Ctrl+E	Center your content on the page. (Commonly used for a formal appearance.)
	Align Right	Ctrl+R	Align content to the right on the page. (Commonly used for a formal appearance.)
	Link		Create a link in your document for quick access to web pages and files. Pasted or typed URL text is converted into a link. For example, "http://myexample.com" becomes "http://myexample.com ". In the **Link** dialog box, choose the type of link you'd like to insert. The **Link Info** tab allows you to choose the link type and set the link protocol and URL. The **Target** tab is only available for the URL link type. It specifies the location where the link opens after you select it.
	Unlink		Delete a link in your email or document. When you place the cursor on a link, the **Unlink** button on the toolbar becomes active. Select the button to remove the link and make it plain text.
	Superscript		Type small letters just above the line of text.
	Subscript		Type small letters just below the line of text.
	Strikethrough		Cross out text by drawing a line through it.
	Insert Image		You can insert an image by directly copying and pasting it inline in the editor, dragging and dropping it from your desktop or local folder directly into the editor, or by typing a URL. The following formats are supported: .PNG, .JPG., or .GIF.

Icon	Name	Shortcut key	Description
			To insert an image inline in your article: 1. Drag and drop the image or copy and paste it directly into the article. 2. Drag any corner of the image to resize it. To insert an image using a URL or navigating to the local image: 1. Choose Insert Image. 2. In the **Image** property dialog, choose from the following options: • Select **Browse** to navigate to the image on your computer. • Or specify the web address of the image, and properties to define how the image appears in the email or article. **Note:** ◦ If the image is located on the external server, use the full absolute path. ◦ If the image is located on a local server, you can use a relative path. ◦ If you want the image to be linked to a target, add a URL for the image. ◦ You can also specify if you want the targeted page to open in a new window, topmost window, same window, or parent window.
	Left to Right		Change the text to left-to-right for content such as a paragraph, header, table, or list. Commonly used for bi-directional language content. This setting is the default setting.
	Right to Left		Change the text to right-to-left for content such as a paragraph, header, table, or list. Commonly used for bi-directional language content. The default setting is left-to-right.
	Undo Typing		Undo changes you made to the content.
	Redo Typing		Redo changes you made to the content.
	Clear All Formatting		Remove all formatting from a selection of text, leaving only the normal, unformatted text.
	Add a Table		Add a table to your content.

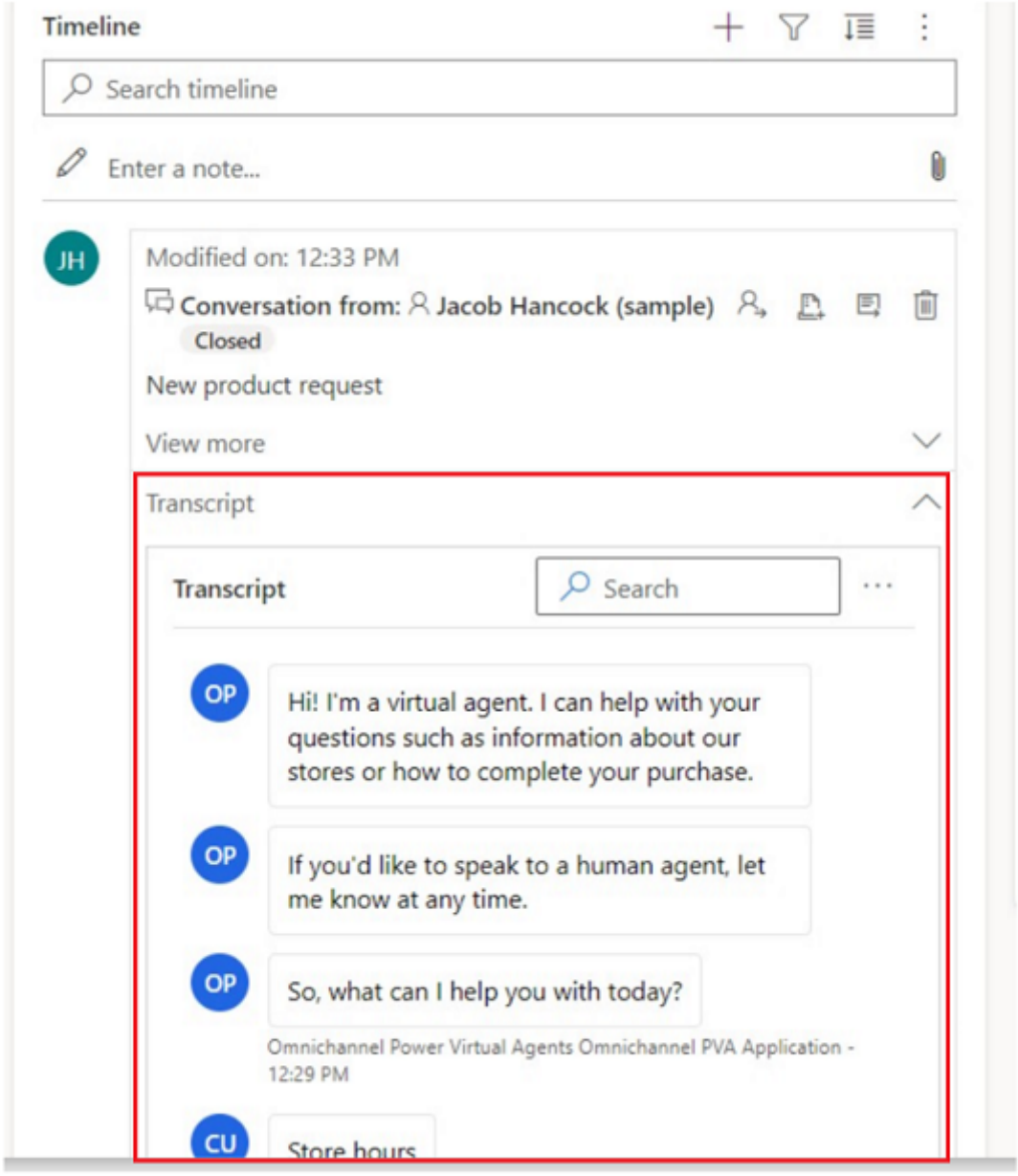
Icon	Name	Shortcut key	Description
			After adding a table, you can do any of the following: • Resize table columns by clicking and dragging your mouse to resize to the columns to the desired width. • Select one or several cells within a table and apply specific formatting, add links to the selection, or cut, copy, or paste entire rows or columns. • Right-click to access the properties. This setting supports features such as cell type, width and height, word wrapping, alignment, merging, and splitting cells horizontally and vertically, inserting or deleting rows and columns, row and column span, and cell and border color.
•••	Expand Toolbar		Appears when the toolbar is collapsed. Select to expand the toolbar and make all options visible.
	Copy to Clipboard		Copies entire text in a note to the clipboard so that you can paste the contents in another location.

The rich text editor is enabled by default. Your system administrator can enable or disable the editor for you.

View a conversation transcript

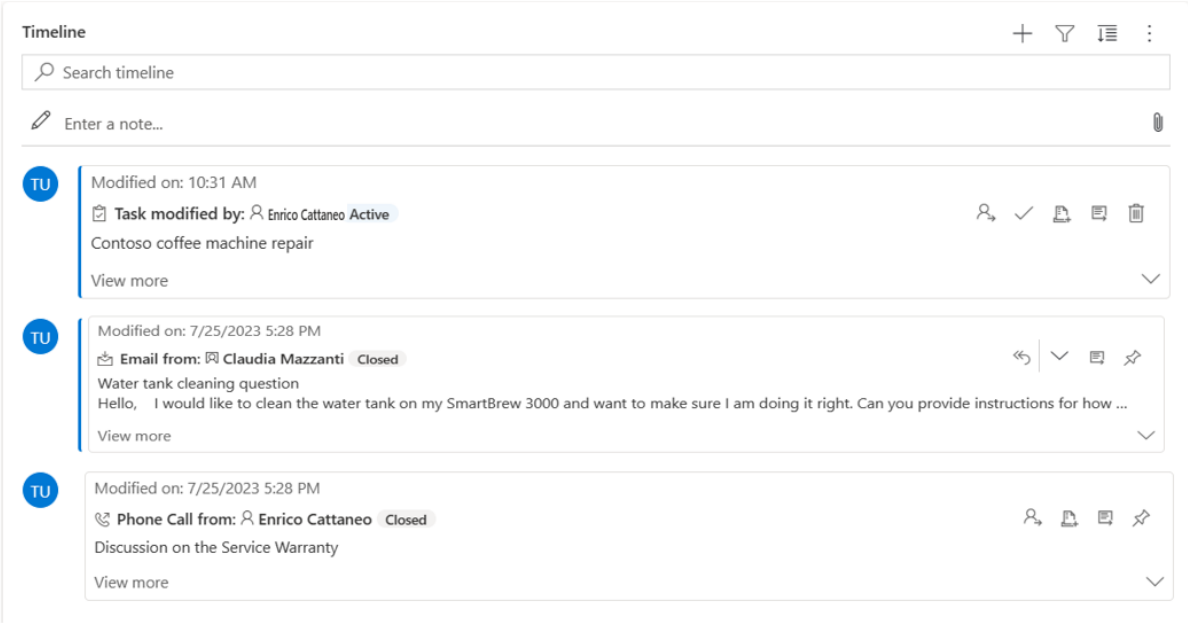
In the timeline, you can view the transcripts of completed chats you've had in conversation channels. To view these transcripts, you must have prvReadmsdyn_transcript permission. More information: Roles and permissions

To view a conversation transcript, select the **View more** link in the row for which you want to view the transcript. The row expands and the entire transcript is displayed inline.



View what you've missed in timeline

When you access the timeline after being away, activities that you've missed display at the top of the timeline, denoted with a blue vertical line next to them. You can quickly open the activities or scroll past them.



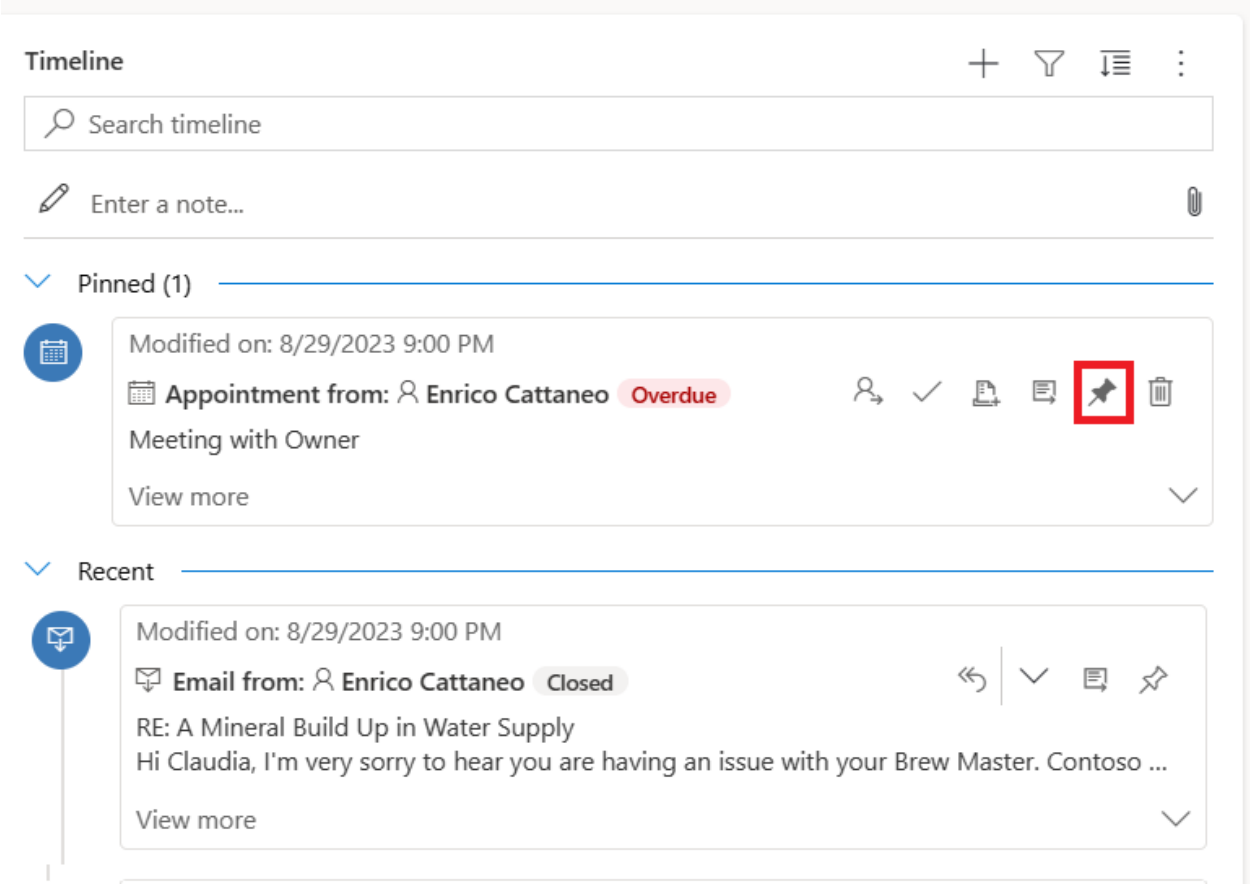
Pin or unpin records in timeline

If your administrator has enabled the pin setting and you have write/delete access, you can quickly access records, such as activities, by keeping them at the top of the timeline. Pinning a record eliminates the need to scroll through every record to find the one you need.

> **Note**
>
> If you have a system administrator or basic user role, the pin and unpin settings work by default. If you don't have either of these roles, you must have Create/Read/Write privileges to be added to the msdyn_customcontrolextendedsettings table for these settings to work.

By default, you can pin notes. The activities that you can pin depend on how your administrator has set up the feature. More information: Let users pin and unpin activities to the top of timeline.

Pin a record by selecting the pin icon next to it. This setting moves it to the top of the timeline in the **Pinned** section, where it can be quickly accessed. The Pinned section also lists the number of records that are pinned. You can pin a maximum of 15 records. Records that are pinned will stay at the top of the timeline for a year unless you unpin them.



To unpin a record, select the pin icon next to it. Unpinning it moves it out of the **Pinned** section and back to where it originally appeared in the list of records in the timeline.

Bookmarks

Bookmarks are a quick way for the user to set, and switch between, different sets of filters. Bookmarks are enabled by default. If necessary, you can disable them from the Advanced section.

> **Note**
>
> Bookmarks feature replaces **Remember my filters** button. Use the steps in the following section to set up your user filters.

Create a bookmark

1. Open the filter pane, and select the filters that will be associated with the new bookmark. You may have no filters selected.
2. Select the bookmark icon in timeline's action bar.
3. Select **Add bookmark**.

4. Enter a bookmark name. Optionally, set it as a default bookmark.

5. Select **Save**.

Selecting the bookmark icon again will now display a flyout of your created bookmarks. You can apply a bookmark by selecting it from this list, or edit it using the **More options** button on the right side of the bookmark.

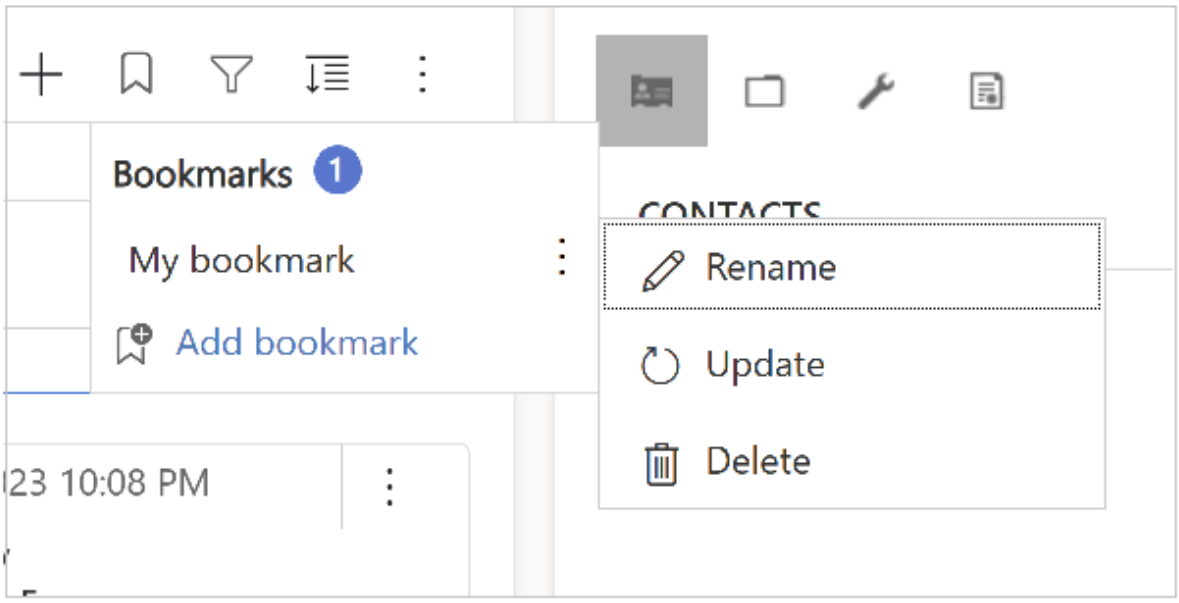
If a bookmark is selected, its filters are applied to the timeline, and is indicated by a filled bookmark icon in the action bar. Hover over the icon to see the name of the bookmark, or select the icon. The selected bookmark has a grey background color.

> **Note**
>
> You can have a maximum of 15 bookmarks.

Edit a bookmark

Any bookmark can be renamed, updated, or deleted from the **More options** menu.

> **Note**
>
> Selecting **Delete** directly deletes the bookmark.



Updating a bookmark will change its filters to the currently selected filters.

You may also set this bookmark as a default for the current form or all forms.

Set a default bookmark

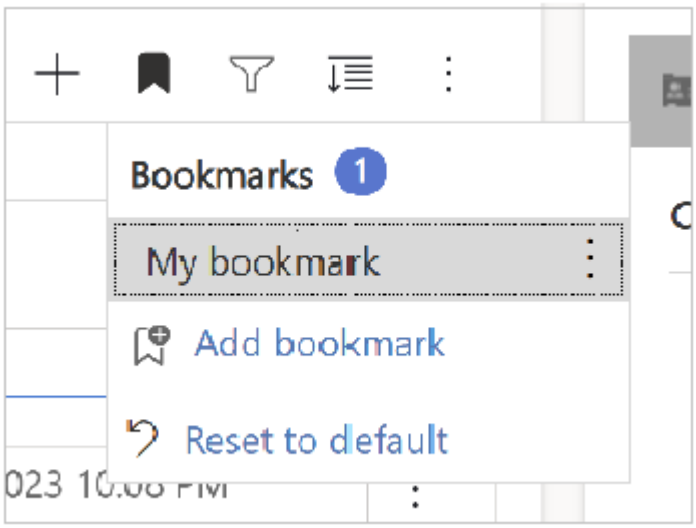
When creating or updating a bookmark, you may select the **Set as default bookmark** checkbox, with the option to apply this change for the current form or globally.

A default bookmark has a star icon ☆ next to its name, and is selected automatically when the timeline loads, overriding any admin filters set for timeline.

> ⓘ **Note**
>
> You may set a bookmark as a form default for multiple forms; however, it can't be both a form default and a global default. A form-default bookmark will override a global one.

Reset to the default view

If a nondefault bookmark is selected, or if other filters are applied, a reset to default button appears in the bookmark flyout. This applies the **default bookmark** to timeline, if one exists, otherwise **clearing all filters**.



Bookmark filters can't be applied

If a bookmark's filters can't be applied (for example, a bookmark that filters for notes while timeline has notes disabled), then an exclamation mark icon is displayed next to its name.

See also

Set up timeline control

FAQs for timeline control

FAQs about Activities and the Timeline Wall

Learn about linking timeline notes with table records

Article • 08/01/2023

You can use notes on the timeline to record case summary, investigations, or add images and files for reference. You can use **Relate note to a table record** on the timeline to perform the following actions on case, account, and contact tables without leaving the page that you're on:

- Move a note on the timeline of an existing table record to another table record. For example, you can move a note on the timeline of a contact to an existing case. After you move the note, it'll appear only on the timeline to which you've moved and not on both.
- Create a new table record from the note. For example, you can create a case from an existing note on a contact's timeline.

Understand linking timeline notes

The following sections contain scenarios to describe how linking timeline notes to tables works.

Move note from one table record to another table record

Consider the following scenario, you have taken a note on the timeline of the account Contoso Coffee during an interaction with the customer about an issue with CX300 coffee machine. After the interaction, you want to link the note to an existing case or create.

To link the note on the Contoso Coffee account to the Issue with coffee machine case:

1. On the Contoso Coffee account timeline, select the note to link.
2. Select **Link to record** button.
3. On the window that appears, search for the case to move the note to. The case is Issue with coffee machine.
4. The application displays a message to confirm if the note must be unlinked from the account table. Select **OK**. The note now appears only on the timeline of the Issue with coffee machine case.

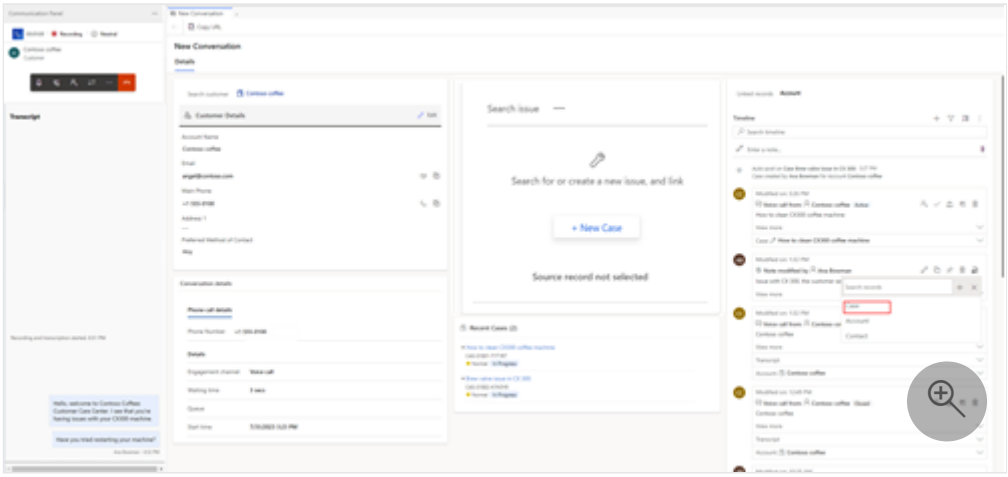
Create a new table record from a note

Consider a scenario where you're talking to an customer over a voice call. The customer's account, Contoso Coffee, appears on the Customer Details section of the Active Conversation form. The timeline on the Active Conversation form is either the account or the contact timeline, based on the record you've selected. More information: Take notes specific to conversation.

On the communication panel, you select **Notes**. After you've saved the note, it's displayed on the timeline.

To create a new case from the note, perform the following steps:

1. Select the note that you took on the timeline for the Contoso Coffee account.
2. Select **Link to record** button.
3. On the window that appears, select **Add a new record**. Based on your administrator's configurations, you see **Case**, **Account**, and **Contact**.
4. Select **Case**. The case form opens and some of the fields on the case form are populated with the content from note based on your administrator configuration. For example, if your administrator has configured to notes title to be copied as the case title and the notes description to be copied to the case description, **Case Title** and **Description** is automatically populated from the note.
5. Add the information on the quick create case form and save the details. The case is created.
6. The application then displays a message to confirm if the note must be unlinked from the table. If you select **OK**, the note appears on the timeline of the new case that you've created.



See Also

Enable linking of timeline notes with other tables

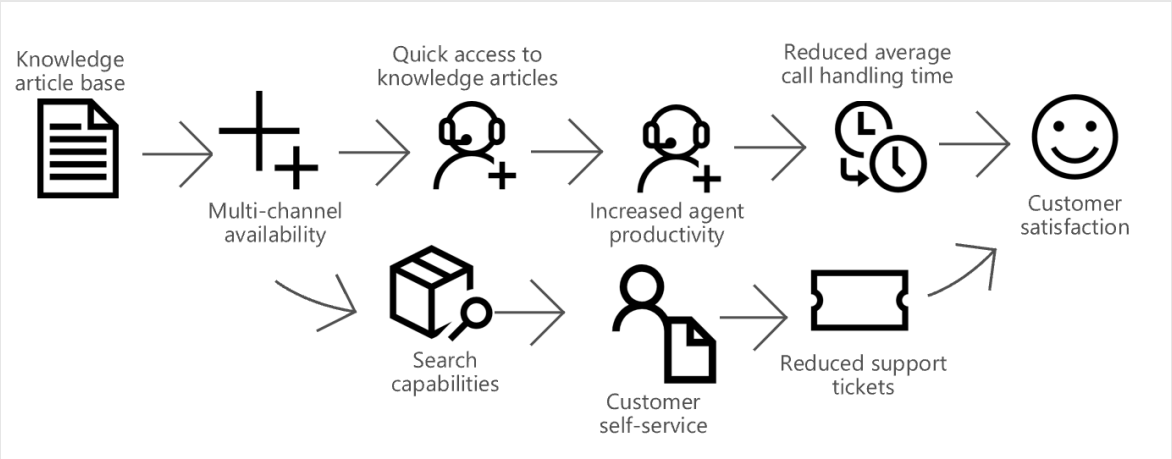
Overview of knowledge management

Article • 12/14/2022

Knowledge management plays a vital role in delivering world-class customer care. It provides team members in an organization the ability to author, categorize, deliver, analyze, and share information through a knowledge base.

Benefits of knowledge management

- Primary service providers, such as agents, can look up information in a knowledge base to resolve customer queries right away, thereby increasing their productivity.
- With access to rich, high-quality knowledge resources across consistent and contextual Omnichannel experiences, agents can resolve issues faster, reducing their average call handling time.
- Customers can use knowledge management search capabilities across channels to solve issues themselves, reducing support tickets and driving customer satisfaction.



Features of knowledge management

Depending on your role in your organization, here's how you can leverage the features of knowledge management to help your organization grow.

Create knowledge articles

Create and design knowledge articles

As a knowledge author, you can:

- Create rich and well-formatted content for emails or knowledge articles using the new rich text editor. More information: Use the rich text editor to create knowledge articles and emails
- Review knowledge articles for accuracy before they're published or made available to others. More information: Review knowledge articles
- Use templates to create knowledge articles quickly, with prepopulated fields in the selected template. Templates also help knowledge managers and authors maintain consistency in branding, language, and structure. More information: Create a knowledge article template
- Set up a default knowledge article authoring language. More information: Configure a default knowledge article authoring language for your organization

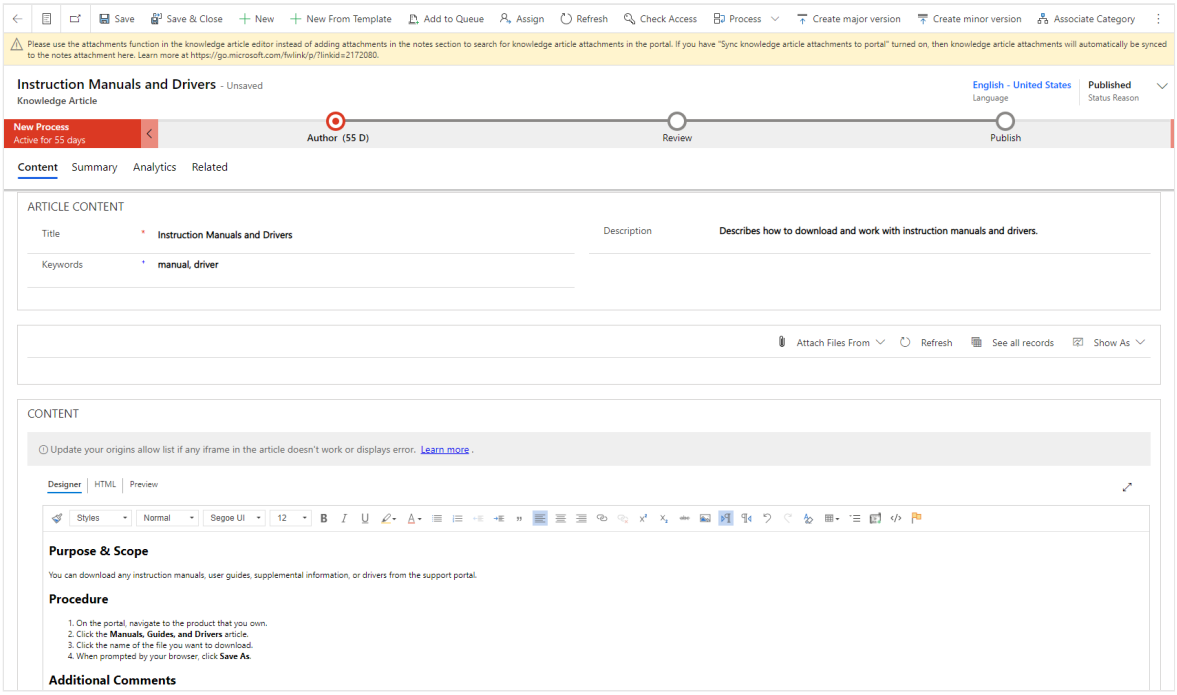
Manage the lifecycle of knowledge articles

As a knowledge author, you can:

- Create major and minor versions of a knowledge article, and keep your articles up to date with the latest information while keeping track of changes throughout the lifecycle of your products and services. More information: Create and manage article versions

- Create a translation for a knowledge article record in multiple languages. More information: Create a knowledge article translation

- Publish articles as soon as they're approved, or schedule them for later publication. You can also set expiration dates on articles. More information: Publish knowledge articles



Create and manage categories for your knowledge articles

As an administrator, you can create hierarchical, categorical data to help group records. Categories are useful for reporting, sorting, segmenting, and categorization of records. More information: Create and manage categories.

Integrate knowledge management with a Power Virtual Agents bot

As an administrator, you can integrate a Power Virtual Agents bot with knowledge management to make it easier to use customized conversations in your bot. This helps free up your agents' time so they can focus on complex issues that need human intervention, as the bot helps answer questions, perform actions, and solve issues that are simple in nature. More information: Integrate knowledge management in Dynamics 365 with Power Virtual Agents bots

Search knowledge articles

Search knowledge articles through different channels

- As an agent, you can use either the **Smart assist** or the **Knowledge search pane** to search articles in Customer Service workspace. **Smart assist** provides you with knowledge article suggestions about your case that helps you resolve customer issues quickly. For more information on **Knowledge search pane**, see: Use the knowledge search pane to search articles
- As a customizer, you can set up knowledge base search control on a standard or custom form to help make it easy for users in your organization to find knowledge articles. More information: Add the Knowledge Base Search control to forms
- As an administrator, you can configure how you want the knowledge base search control to appear for your entities on the app side pane of Customer Service workspace and Omnichannel for Customer Service. Configuring a record type will specify the information that your agents will see while they interact with customers. More information: Configure knowledge search control on app side pane for an entity record

Search multiple knowledge providers

As an administrator, you can use search providers to federate the search of files, documents, or articles from data sources outside of your organization. More information: Set up external search providers

Set up search logic and search filters

As an administrator, you can:

- Set up a knowledge search logic for your knowledge articles to help agents find only the articles they need. More information: Set up knowledge search logic.
- Create filters to help your agents more quickly find what they're looking for. More information: Customize search filters for knowledge articles

Perform knowledge self-service

Search the knowledge base on portals

Having a knowledge base on the portal makes it a customer self-service portal, where you can access and search for knowledge articles through simple queries. This helps resolve issues and makes information easily accessible. You can search for your knowledge articles by selecting **Knowledge Base** from your portal. More information: Search the knowledge base on portals

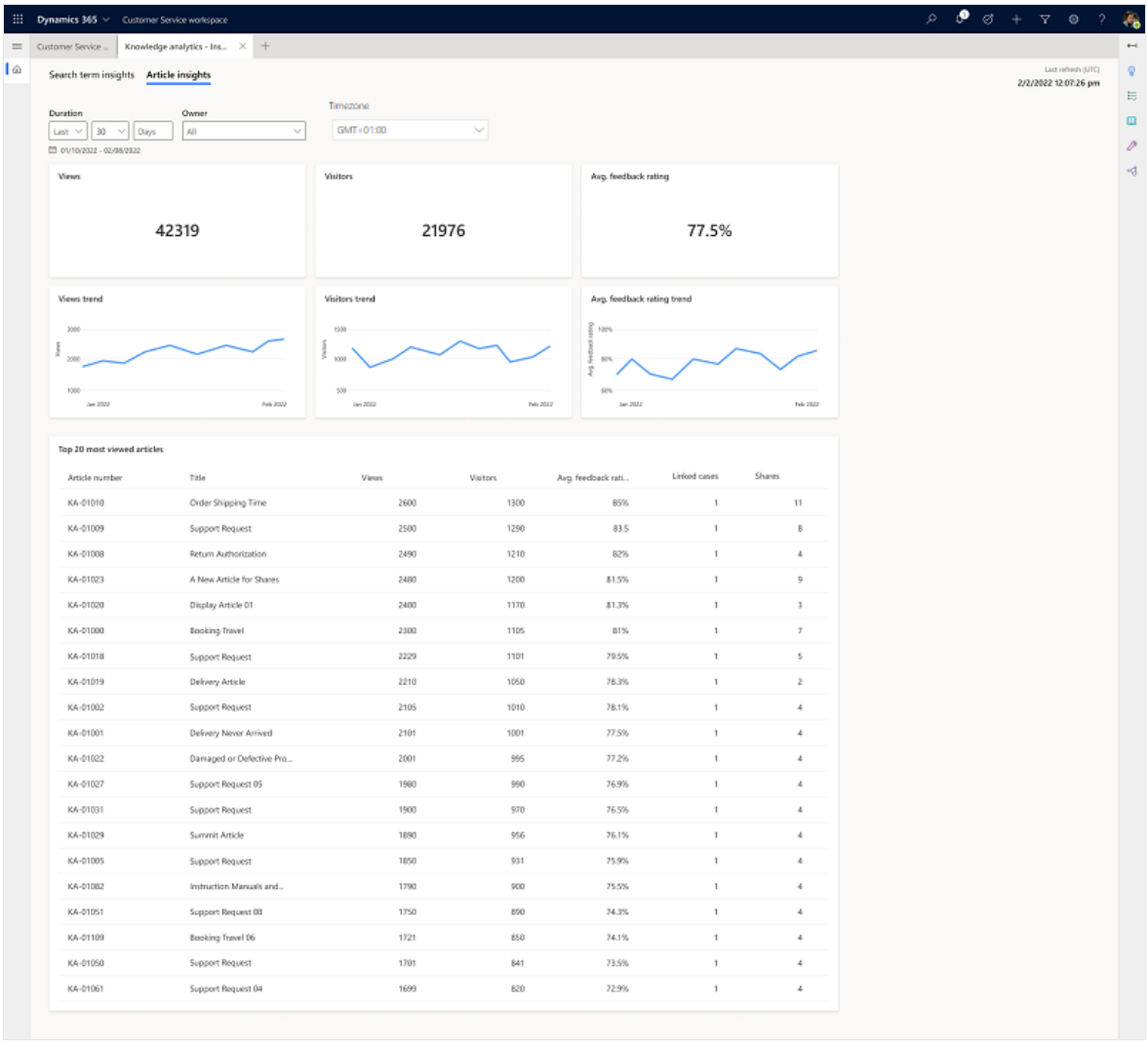
Analyze and report

Track and analyze knowledge article statistics

As an administrator, you can:

- Track how many times an article is used, viewed, and sent to customers. Use this information to proactively create knowledge based on search insights across customers and agents.

- Use the knowledge search analytics dashboard to provide supervisors and knowledge workers with valuable insights into how your support agents are finding and using knowledge articles. More information: Manage Knowledge analytics



As a supervisor, you can identify searches that have low success or return no results through the Knowledge search analytics dashboard to help identify knowledge gaps, improve search results, and surface the most relevant articles. More information: Introduction to knowledge analytics

See also

Configure origins allowlist for knowledge articles

Search and share knowledge articles

Search for knowledge articles in Customer Service workspace

Create a knowledge article using a template

Configure knowledge management

Article • 07/03/2023

Introduction

A comprehensive knowledge base is a key to increased customer satisfaction and improved productivity of users. Give users quick access to the knowledge base by setting up knowledge management in Dynamics 365 Customer Service.

> **ⓘ Important**
>
> Usage of Parature knowledgebase as a knowledge management solution has been deprecated. For more information, see **Important changes coming**.

After knowledge management is set up, users will be able to:

- Search for relevant knowledge base articles from Customer Service while they're working on a record.
- Set up the search logic, suggest-as-you-type option, and search filters to get only the required knowledge articles, thereby providing timely and consistent information to customers while working on their cases.
- Use smart assist to receive AI suggestions on related knowledge articles and similar cases.
- See the content of the knowledge base article inline, including images and videos.

Setup overview

You can set up knowledge management on the Customer Service admin center, Customer Service Hub, or manually for a model-driven app.

- Set up knowledge management
- Set up knowledge management settings page manually for a model-driven app

After you have configured knowledge management on your app, you must also set up the various other aspects of knowledge management, based on your organizational requirements, such as:

- Configure knowledge base article URLs

- Create and manage categories
- Create templates for knowledge articles
- Set up AI suggestions for article keywords and description
- Set up external search providers

Set up knowledge management

Make sure that you have the System Administrator or System Customizer security role or equivalent permissions. You must also be the tenant administrator of Microsoft 365.

You can set up knowledge management in the Customer Service admin center or Customer Service Hub app. The settings you configure for knowledge management in the Customer Service Hub app are carried over to the Customer Service admin center app, and vice versa.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.

2. In the **Record types** section, select **Manage**.
   a. On the **Record Types** page, add and configure the record types for which you want to turn on knowledge management. More information: Configure knowledge search control on app side pane for an entity record. By default, knowledge management is enabled for **Case** and **Conversation** record types. The ability to set up knowledge search control for app side pane is available only in the Customer Service admin center app.

3. In the **General Settings** section, select **Manage**. The **General Settings** page appears.
   a. In the **Search results display count** section, select the display count from the dropdown. This option is only available for the app side pane knowledge base search control, and standalone knowledge base search control in single session and multisession apps.
   b. In the **Feedback** section, set the **Enable feedback** toggle to **Yes**. To learn more about how users use this option, see Submit ratings and feedback for knowledge articles.
   c. In the **Authoring language** section, set the **Enable default authoring language** for your users to **Yes**.

- If you want to select a default knowledge authoring language for your organization, then select the **Organization's UI language** radio button.
- If you want to use the organizations' s UI language as the default knowledge authoring language, select the **Other language** radio button, and then select a language from the **Language** dropdown.
- If you also want to allow users to set their default knowledge authoring language, set the **Allow users to set default knowledge authoring language** toggle to **Yes**. More information: Configure a default knowledge article authoring language for your organization
- In the **Origins allow list** section, add your origins links to the **Add origin links** field. More information: Configure origins allowlist for knowledge articles.
- In the **Knowledge search logic** section, set the **Set search mode as all** toggle to **Yes**. More information: Set up knowledge search logic
- Select **Save**.

4. Optionally, in the **Categories** section, select **Manage**. The **Categories System Views** page appears. You can create and manage a logical structure of categories for your records. More information: Create and manage categories.

5. In the **Filters** section, set the **Enable search filters** toggle to **Yes**. If you want to allow agents to save the the search filters according to their areas, set the **Allow agent to personalize** toggle to **Yes**.

6. In the **Portals** section, select **Manage**. The **Portals** page appears.
   a. In the **Support portal connection** section, do the following to share knowledge articles as URLs:

      - Set the **Use an external portal** toggle to **Yes** to integrate an external portal to publish knowledge articles.
      - **URL Format**: Type the portal URL that will be used to create external (public-facing) portal links for knowledge articles, which the service agents can share with the customers. The external URL is created in the following format: https://support portal URL/kb/{kbnum}. The placeholder, "{kbnum}", is replaced by an actual knowledge article number.

   b. In the **Sync knowledge article attachments to portal** section, set the **Sync attachments to the portal** toggle to **Yes**. More information: Update knowledge article attachments for portal

7. Optionally, in the **Article templates** section, select **Manage**. The **Article Templates System Views** page appears. You can create templates to help

knowledge authors use consistent language and messaging. More information: Create templates for articles.

8. Optionally, in the **Search providers** section, select **Manage**. The **Search providers System Views** page appears. You can use search providers to federate the search of files, documents, or articles from data sources outside of your current Dynamics 365 organization. More information: Set up external search providers

> **Note**
>
> During the creation of knowledge articles, duplicate detection rules aren't supported on the Knowledge Article entity.

Set up knowledge management settings page manually for a model-driven app

> **Note**
>
> The embedded knowledge search control is deprecated in the web client. You must use the Knowledge Settings page in Unified Interface.

If you are using the custom model-driven app, you need to manually update your sitemap with the Knowledge Settings page. To update the sitemap:

1. Select your custom app.
2. Select **Open in app designer**.
3. Select **Site Map**.
4. Select **Add** > **Subarea** to create a new sub area for your area.
5. In the **Properties** > **SUB AREA** section, provide the following information:
   - Type: Select **URL**.
   - URL: Enter `/main.aspx?pagetype=inlinedialog&name=KnowledgeSettings`

Configure knowledge base article URLs

Knowledge articles can be configured with their portal URLs, and then agents can copy and share the URL links.

> **Note**
>
> Before you can configure knowledge articles with their own URLs, you must create a portal using your domain name. For information on how to create a portal, see **Create a portal in an environment containing customer engagement apps**.

You can configure a knowledge base article URL in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Support portal connection** section.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
2. On the **Knowledge** page, go to the **Portal** section and select **Manage**. The **Portal** page appears.
3. On the **Portal** page, go to the **Support portal connection** section.

2. Set the **Use an external portal** toggle to **Yes**.
3. In the **URL format** field, enter the URL name.
4. Select **Save**.

The knowledge base article link is now active and can be copied and shared.

Update knowledge article attachments for portal

With the knowledge article attachments option, you can stop using notes attachments for the portal. To use knowledge article attachments for the portal, you must enable the feature in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Sync knowledge article attachments to portal** section.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
2. In the **Portals** section, select **Manage**. The **Portal** page appears.
3. On the **Portals** page, go to the **Sync knowledge article attachments to portal** section.

2. Set the **Sync attachments to portal** toggle to **Yes**.
3. Select **Save**.

Set up AI suggestions for article keywords and description

You can enable knowledge authors to get suggested keywords and description based on the article content stored in the built-in knowledge article entity. More information: Configure AI suggestions for article keywords and description.

Set up knowledge search logic

If you have Dataverse search enabled, you can apply knowledge search logic for your knowledge articles to help agents find only the articles they need. By default, knowledge search works by the `searchMode=any` logic, which brings up articles that match any of the keywords used in your search. If you search for Contoso Coffee, the search results will show articles that have either "Contoso" or "Coffee", as seen in the following example:

- Article 1: Contoso machine repair
- Article 2: Coffee powder quality
- Article 3: Contoso coffee order price
- Article 4: Coffee machine order for Contoso
- Article 5: Espresso coffee machine troubleshooting

You can enable the knowledge search to work by the `searchmode=all` logic, which matches all the keywords that you used in the search. If you search for Contoso Coffee, the search results will show articles that match both "Contoso" and "Coffee", as seen in the following example:

- Article 1: Contoso coffee order price
- Article 2: Coffee machine order for Contoso

You can set up the knowledge search logic in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Settings** page.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**.
2. On the **Knowledge** page, in the **General settings** section, select **Manage**. The **General settings** page appears.

2. In the **Knowledge search experience** section, set the **Set search mode as all** toggle to **Yes**.
3. Select **Save**.

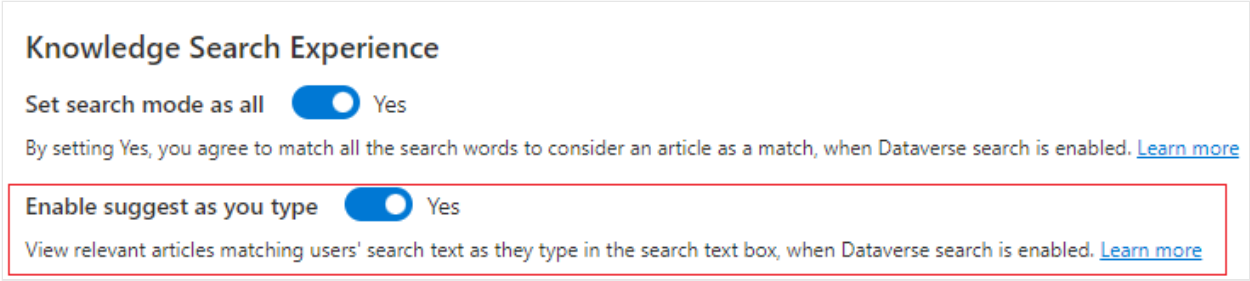
More information: Search across table data using Dataverse search

Enable the suggest-as-you-type option

You can help agents improve their productivity by setting the **Enable suggest as you type** toggle to **Yes**. This feature provides suggestions on the most relevant records as agents type keywords in the search box. The search phrase is matched against the title of the article, and the matching results appear in a flyout menu. The matched text is highlighted to show the presence of the keyword.

When an agent selects the record, the system displays the article inline on the knowledge search control embedded on a form, on an application tab in Customer Service workspace, and as an inline view in the independent knowledge search control. More information: Use suggest-as-you-type

1. In the Customer Service admin center site map, select **Knowledge** in **Agent experience**.
2. On the **Knowledge** page, in the **General settings** section, select **Manage**. The **General settings** page appears.
3. In the **Knowledge search experience** section, set the **Enable suggest as you type** toggle to **Yes**.
4. Select **Save**.



See also

Add the Knowledge Base Search control to a form

Work with knowledge articles

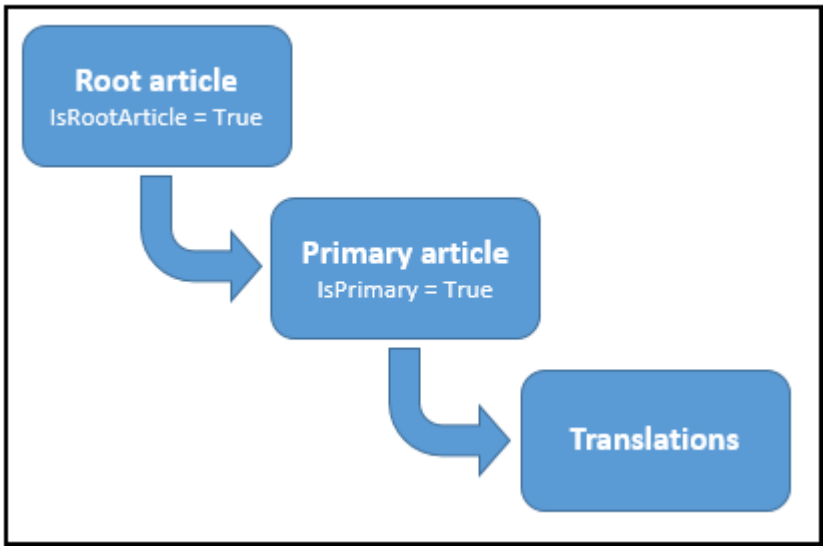
Article • 02/17/2022

The new knowledge experience in Dynamics 365 Customer Service enable you to create rich knowledge articles along with versioning and translation support. The new knowledge experience uses the `KnowledgeArticle` entity to store and manage knowledge natively in Dynamics 365 Customer Service.

> ⓘ **Note**
>
> The entities `KBArticle`, `KBArticleTemplate` and `KBArticleComment` are now deprecated. This means that we do not expect you to use these entities anymore. You must use the newer `KnowledgeArticle` entity for knowledge management in Dynamics 365 Customer Service. For more information, see the section **Deprecated knowledge entities** at the end of this topic.

Create a knowledge article

When you create a knowledge article record, Dynamics 365 Customer Service internally creates a root article for the record. The root article acts as a container for the primary knowledge article created by you along with all the article versions and translations that you might create in future. The following diagram depicts the entity model for the `KnowledgeArticle` entity.



When you create a knowledge article record, it is created in the `Draft` state. Using the new `KnowledgeArticle` entity, you can create an article by specifying its contents and formatting in HTML format. You can specify your own value for the

`KnowledgeArticle.ArticlePublicNumber` attribute while creating a knowledge article record programmatically; otherwise, the value is automatically generated based on the format you specified in the Dynamics 365 Customer Service settings area in the web client. The `KnowledgeArticle.ArticlePublicNumber` attribute stores the ID exposed to customers, partners, and other external users to reference and look up knowledge articles, and remains the same across knowledge article versions and translations.

The following sample code shows how you can create a knowledge article record.

C#

```
KnowledgeArticle newKnowledgeArticle = new KnowledgeArticle
{
   Title = "Sample Knowledge Article",
   Content = "<p>This is the article content.</p>"
};
knowledgeArticleId = _serviceProxy.Create(newKnowledgeArticle);
Console.WriteLine("Created {0}", newKnowledgeArticle.Title);
```

Create major and minor versions of a knowledge article

When you create a knowledge article record, the major version is automatically set to 1 and minor version to 0. Use the `CreateKnowledgeArticleVersion` message (CreateKnowledgeArticleVersion Action or CreateKnowledgeArticleVersionRequest) to create a major or minor version of a knowledge article. In the request message, set `IsMajor` to `true` to create a major version; set it to `false` to create a minor version. The new version record that is created uses the:

- `KnowledgeArticle.RootArticleId` attribute to maintain the association with the root knowledge article record.
- `KnowledgeArticle.PreviousArticleContentId` attribute to point to the previous version of the record.

The following sample code shows how you can create a major version of a knowledge article record using CreateKnowledgeArticleVersionRequest.

C#

```
CreateKnowledgeArticleVersionRequest versionRequest = new
CreateKnowledgeArticleVersionRequest
{
   Source = new EntityReference(KnowledgeArticle.EntityLogicalName,
```

```
knowledgeArticleId),
   IsMajor = true
};
CreateKnowledgeArticleVersionResponse versionResponse =
(CreateKnowledgeArticleVersionResponse)_serviceProxy.Execute(versionRequest)
;
```

Create a knowledge article translation

Use CreateKnowledgeArticleTranslation Action (Web API) or CreateKnowledgeArticleTranslationRequest (organization service) to create a translation for a knowledge article record. You can translate your knowledge article in more than 150 languages, and information about these supported languages is available in the new `LanguageLocale` entity.

More information: LanguageLocale Entity.

Using CreateKnowledgeArticleTranslation Action (Web API) or CreateKnowledgeArticleTranslationRequest (organization service) creates a new knowledge article record with the title, content, description and keywords copied from the source record to the new record, and the language of the new record set to the one you specified in the request. You also need to specify whether the new record will be a major or minor version. The new record uses the `KnowledgeArticle.ParentArticleContentId` attribute to maintain the association with the primary knowledge article record.

After you execute this message and get a response, retrieve the knowledge article record from the response object, and then update the title, content, description, and keywords to add the translated content.

The following sample code shows how to create a knowledge article translation using CreateKnowledgeArticleTranslationRequest:

C#

```
CreateKnowledgeArticleTranslationRequest translationRequest = new
CreateKnowledgeArticleTranslationRequest
{
   Source = new EntityReference(KnowledgeArticle.EntityLogicalName,
knowledgeArticleId),
   Language = new EntityReference(LanguageLocale.EntityLogicalName,
languageLocaleId), //languageLocaleId = GUID of the Primary Key of
LanguageLocale record
   IsMajor = true    // Creating a major version
};
CreateKnowledgeArticleTranslationResponse translationResponse =
```

```
(CreateKnowledgeArticleTranslationResponse)_serviceProxy.Execute(translation
Request);

// Retrieve the new knowledge article record
KnowledgeArticle respObject =
(KnowledgeArticle)_serviceProxy.Retrieve(KnowledgeArticle.EntityLogicalName,
      translationResponse.CreateKnowledgeArticleTranslation.Id, new
ColumnSet(true));
```

> **Note**
>
> The GUID value of the primary key (`LanguageLocaleId`) for each language record in the `LanguageLocale` entity is the same across all Dynamics 365 Customer Service organizations.

Knowledge article lifecycle: Change the state of a knowledge article

During its lifecycle, a knowledge article can be in the following states:

- 0: Draft (after a knowledge article is created)
- 1: Approved (after a knowledge article is approved)
- 2: Scheduled (after a knowledge article is scheduled to be published)
- 3: Published (after a knowledge article is published)
- 4: Expired (after a knowledge article is expired as per the expiration date specified while publishing)
- 5: Archived (after a knowledge article is archived)
- 6: Discarded (after a knowledge article is discarded)

To change the state of the article, use the `Update` message on the knowledge article record to update the `KnowledgeArticle.StateCode` attribute. For early bound types, use the `KnowledgeArticleState` enumeration to set the possible states. More information: Perform specialized operations using Update.

The following sample code shows how to publish a knowledge article record.

```
C#
```

```
// Retrieve the knowledge article record
KnowledgeArticle myKnowledgeArticle =
(KnowledgeArticle)_serviceProxy.Retrieve(
        KnowledgeArticle.EntityLogicalName, knowledgeArticleId, new
ColumnSet("statecode"));

// Update the knowledge article record
myKnowledgeArticle.StateCode = KnowledgeArticleState.Published;
UpdateRequest updateKnowledgeArticle = new UpdateRequest
{
    Target = myKnowledgeArticle
};
_serviceProxy.Execute(updateKnowledgeArticle);
```

Associate a knowledge article record with a Dynamics 365 Customer Service entity instance

When you enable embedded knowledge search for an entity in Dynamics 365 Customer Service using the web client, a many-to-many relationship, `msdyn_<Entity_Name>_knowledgearticle`, is automatically created. You can use this relationship to programmatically associate or link a `KnowledgeArticle` instance with a Dynamics 365 Customer Service entity instance. When you associate a `KnowledgeArticle` instance with an entity instance, a record for the relationship is created in an intersect entity called `msdyn_<Entity_Name>_knowledgearticle`. For example, when you associate a `KnowledgeArticle` instance with an `Account` instance for the first time, an intersect entity called `msdyn_account_knowledgearticle` is created, and a record with the association mapping is created in this intersect entity. By default, the `Incident` (Case) entity is enabled for the embedded knowledge search, and when you link a `KnowledgeArticle` record to an `Incident` record, an association record is created in the `KnowledgeArticleIncident` intersect entity.

The following sample code demonstrates how to associate a `KnowledgeArticle` instance with an `Account` instance:

C#

```
// Associate the knowledge article record with an account record

// Step 1: Create a collection of knowledge article records that will be
// associated to the account. In this case, we have only a single
// knowledge article record to be associated.
EntityReferenceCollection relatedEntities = new EntityReferenceCollection();
relatedEntities.Add(new EntityReference(KnowledgeArticle.EntityLogicalName,
```

```
knowledgeArticleId));

// Step 2: Create an object that defines the relationship between knowledge
article record and account record.
// Use the many-to-many relationship name (msdyn_account_knowledgearticle)
between knowledge article
// record and account record.
Relationship newRelationship = new
Relationship("msdyn_account_knowledgearticle");

// Step 3: Associate the knowledge article record with the account record.
_serviceProxy.Associate(Account.EntityLogicalName, accountId,
newRelationship, relatedEntities);
```

Increment knowledge article view count

Use the IncrementKnowledgeArticleViewCountRequest message to increment the view count of a knowledge article record for a given day in the `KnowledgeArticleViews` entity. If a record doesn't exist for a knowledge article for a specified day, it will create a record and then set the specified view count value in the `KnowledgeArticleViews`.`KnowledgeArticleView` attribute. If a record already exists for a knowledge article for the specified day, it will just increment the view count in the `KnowledgeArticleViews`.`KnowledgeArticleView` attribute of the existing record.

Search knowledge articles using full-text search

Knowledge articles in Dynamics 365 Customer Service, including their versions and translations, are full-text indexed and support SQL Server full-text search. For more information about full-text search, see SQL Server: Full-text Search.

Use the FullTextSearchKnowledgeArticleRequest message to search knowledge article from your applications to find the information you are looking for. The FullTextSearchKnowledgeArticleRequest message lets you use inflectional stem matching (allows for a different tense or inflection to be substituted for the search text) and specify query criteria (using FetchXML or QueryExpression to specify filtering, ordering, sorting, and paging) to find knowledge articles with specified text. You can also choose to remove multiple versions of the same articles in the search results and filter on the knowledge article state while searching for a text.

Deprecated knowledge entities

The following legacy entities have been deprecated. More information: Deprecated knowledge entities

- KbArticle
- KbArticleComment
- KbArticleTemplate

Legacy knowledge entities are not accessible as of December 1, 2020. We strongly recommend that you move to the KnowledgeArticle entity. For more information about creating a knowledge article in Unified Interface, see Create and manage knowledge articles.

Use the following for help with migration:

- Use SDK, WebAPI, or Microsoft Power Automate depending on your scenarios.
- Use the open source migration tool with MIT license.

> **Important**
>
> - The open source migration tool is not support by Microsoft and may need to be modified to suit your scenarios.
> - Always run a test environment before using in production.
> - Check the license and readme before you use the tool.

See also

- Knowledge Base Entities
- KnowledgeArticle Entity
- Configure AI suggestions for article keywords and description
- KnowledgeArticleViews Entity
- KnowledgeBaseRecord Entity
- LanguageLocale Entity
- Important changes coming in future releases of Microsoft Dynamics 365

Set up external search providers

Article • 06/30/2023

Use external search providers to federate the search of files, documents, and articles from data sources, such as SharePoint or another organization outside your current organization.

You can set up one of the following as a search provider:

- **Cross-Organizational Search**: Lets you specify an organization within the Microsoft organization to search articles. The organization URL is automatically identified. If the selected organization is in another geographical region, data transfer occurs across these locations.
- **Sharepoint**: Lets you specify the SharePoint URL that's in the same Microsoft organization as the current organization in which you're configuring the search provider.
- **Microsoft Graph connector**: Lets you specify the unique connection ID of the connector. Use this option if your organization uses Microsoft Search to index all external data. You need to specify the unique connection ID only when you create the connector.

In Microsoft Cloud for Sovereignty, the external search providers feature is available for use in Government Community Cloud (GCC) only.

To view search results, your agents must have access to external content.

Use the integrated search provider option to set up third-party knowledge sources, such as enterprise websites that are based on the site map protocol. For more information, see Manage integrated search providers.

Set up a search provider

> **Note**
>
> Before you set up a search provider, ensure that your firewall doesn't block the **https://www.d365ccafpi.com/** domain. Otherwise, users will encounter errors.

You can set up a search provider in the Customer Service admin center or Customer Service Hub app by performing the following steps:

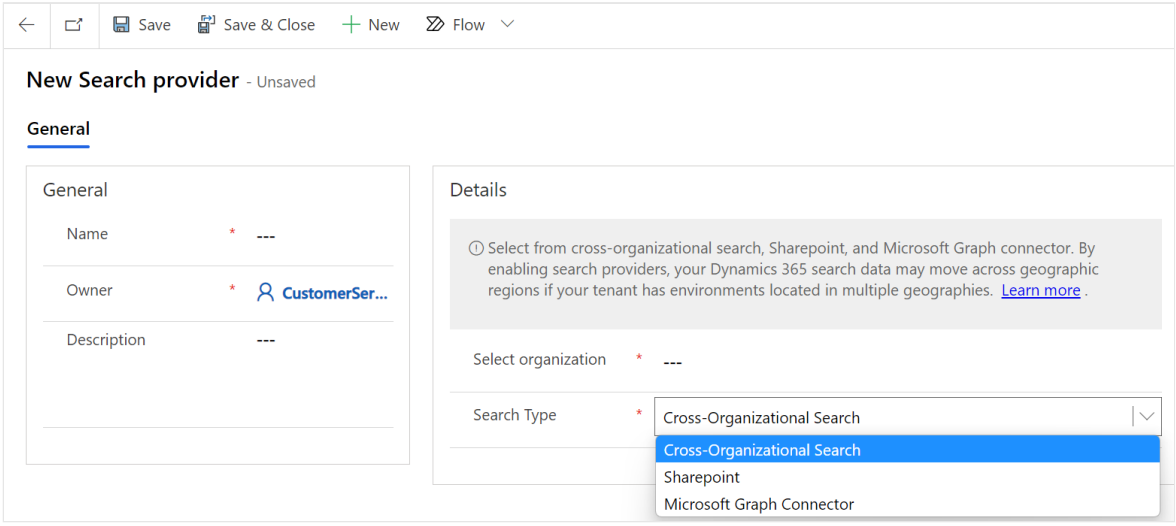
1. Go to **External search providers**.

Customer Service admin center

> **Note**
>
> **Search Providers** on the **Knowledge** page has been renamed as **External search providers**.

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
2. In the **External search providers** section, select **Manage**.

2. Select **New**.
3. On the **New Search provider** page, **General** section, enter the name and owner of the search provider. Optionally, you can enter a description.
4. In the **Details** section, select the organization and the type of search provider you want to use from the **Select organization** and the **Search Type** dropdown, respectively.



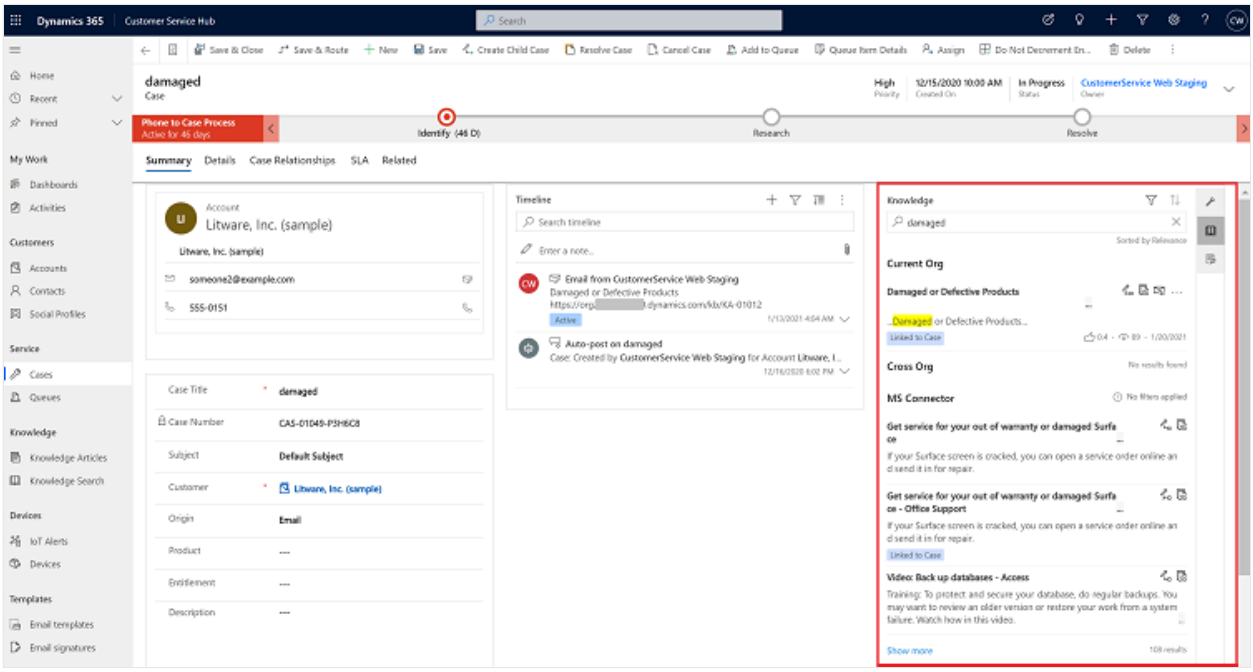
5. Select **Save**.

Post-configuration agent experience

After you've configured the search providers, agents can view links in their search results for each search provider included in their current organization.

> **Note**

The **configured value for the number of article search results** won't be applicable, if you configure even a single external search provider. For each configured search provider, the search results will display three articles. Agents can select **Show more** to view additional results.



For more information about agent search experience, go to Use external search providers.

> **Note**
>
> Custom roles must have **Read**, **Create**, **Append**, and **AppendTo** access to the following entities to see search results from other search providers:
>
> - Knowledge Federated Article
> - Knowledge Federated Article Incident

See also

Add the Knowledge Base Search control to forms

Create and manage knowledge articles

Understand knowledge base search mechanisms

Search for knowledge articles in the Customer Service Hub

Manage integrated search providers

Article • 07/21/2023

With integrated search providers in Dynamics 365 Customer Service, you can configure third-party sources, such as enterprise websites that are based on the site map protocol. Articles are ingested into Dataverse and refreshed on the schedule you specify.

Prerequisites

If you're a first-time user, you must provision integrated search providers. Make sure that you have the following privileges:

- Basic level: **prvReadconnector**
- Global level:
  - **prvReadWorkflow**
  - **prvWriteWorkflow**
  - **prvCreatemsdyn_knowledgeconfiguration**
  - **prvReadmsdyn_knowledgeconfiguration**
  - **prvWritemsdyn_knowledgeconfiguration**
  - **prvDeletemsdyn_knowledgeconfiguration**

Learn more about security roles and privileges.

Provision integrated search providers

1. Sign in to the Dynamics 365 Customer Service admin center.
2. Go to **Knowledge** > **Integrated Search providers (Preview)** > **Manage**.
3. On the **Integrated search providers** page, select **Set up integrated search**.

If you aren't able to provision the integrated search provider, you'll need to enable the Integrated Search API trigger flow.

If integrated search isn't enabled in your geographical region, contact Microsoft Support to provision the feature.

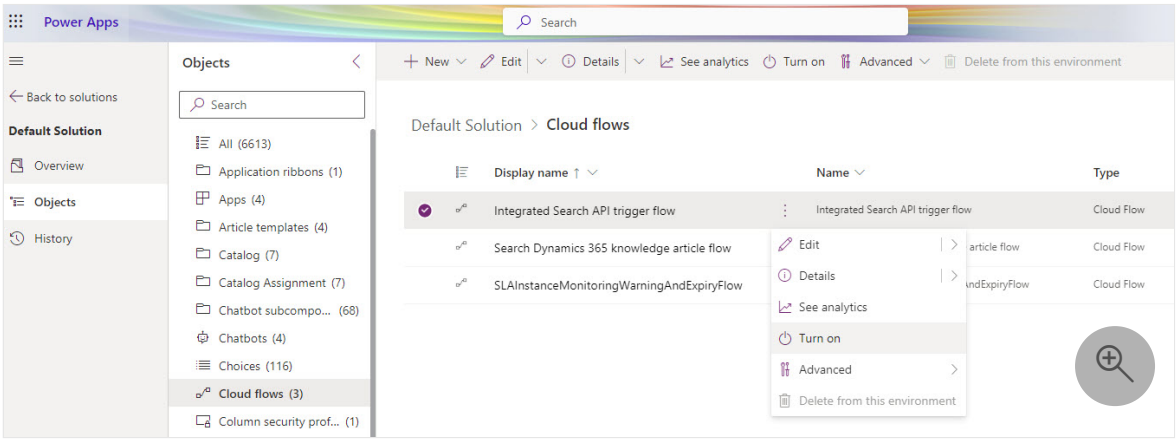
Enable the Integrated Search API trigger flow

> **Note**

To turn on the **Integrated Search API trigger** flow, you must have the **prvReadWorkflow** (Global-level) privileges.

> **Tip**
>
> Images that include an icon that looks like this: may be expanded to show more detail. Select the image to expand it. To close it, press the Esc key.

1. Sign in to make.powerapps.com.
2. Go to **Solutions** > **Default Solution** > **Cloud flows** and turn on **Integrated Search API trigger flow**.



Add integrated search providers

1. In the Customer Service admin center, under **Experiences**, select **Knowledge**.
2. On the **Knowledge** page, in the **Integrated search providers** section, select **Manage**.
3. Select **New**.
4. In the **Provider info** section:
   - **Search provider name**: Enter the name of the search provider.
   - **Description**: Enter the description of the search provider.
   - Select the authorization check box.
5. Select **Next**.
6. In the **Authentication and testing** section:

- **Root URL**: Enter the root URL of the search provider website, including the protocol.
- **Site map URL**: Enter the site map URL of the website. To get the site map URL, enter the root URL followed by `/robots.txt` in the address bar, and then search the file for "sitemapindex." For example, type https://www.contoso.com/robots.txt in the address bar.

  > **Note**
  > - The site map that you provide must have the **lastmod** tag within the article **url** tag.
  > - The site map and the site index files must have content-type as either application/xml or text/xml.
  > - You must provide static websites only for data ingestion. Websites that return scripts to load content aren't supported for data ingestion.
  > - A unique combination of root URL, site map URL, and language filters only are allowed.

- **Language filter for ingestion**: Select the languages you want to map for the ingestion. Select **Reset** to clear your selection. By default, all languages are considered for ingestion. If you apply language filters, you must maintain the mapping for language code.

7. Select **Next**.
8. In the **Knowledge article schema** section, select either **Field Mapping** or **JSON Schema**.

   You can't change the configuration method after you save it. Learn more about knowledge article schema mapping.
9. In the **Refresh Schedule** section, specify the refresh intervals:

   - **Refresh frequency**: Select a value from the list to specify the frequency at which new or updated articles are ingested from the search provider. To pause ingestion, select **No refresh**.
   - **Lookback period**: Select a value from the list to specify an additional period over which articles should be ingested that might have been missed during the initial ingestion.

For example, if you set the refresh frequency at 15 minutes and lookback period at 2 hours, your data is refreshed for the last 2 hours and 15 minutes, every 15 minutes.

10. Select **Next**.
11. In the **Summary** section, review the information you entered and make any changes you need to.
12. Select **Save and close**.

    The new search provider appears on the **Knowledge** > **All integrated search providers** page. Its status is **Inactive** with status reason **Validated**.

    If you need to add further information, select **Save as draft**. The status is **Inactive** with status reason **Draft**.

Run ingestion for search providers

Depending on the search provider's status, run either a time-range based or a trial ingestion. When you start a trial ingestion, you can spot and correct any errors. View the status of your ingestion on the **Insights** tab in the **Crawl failures** column.

You can't run ingestion for search providers that are **Inactive** with status reason **Draft**.

Trial ingestion

If your search provider is **Inactive** with status reason **Validated**, you can run a trial ingestion.

1. On the **Knowledge** > **All integrated search providers** page, select the search provider.
2. Select **Run Ingestion**.
3. Select **Trial Ingestion**.
4. Specify the number of articles to ingest from the **No of records** list. The maximum number of articles you can select is 1,000.

Check the **Insights** tab for errors. If you don't see any and you want to run a time-range based ingestion, activate the search provider first.

Time-range based ingestion

If your search provider is **Active** with status reason **Ingestion Ready**, initiate a time-range based ingestion.

1. On the **Knowledge** > **All integrated search providers** page, select the search provider.
2. Select **Run Ingestion**.
3. Select **Time-range based ingestion**.
4. Specify the date range from which to pick up updated articles for the ingestion. The date range has to be 60 days from the **From** date.

Activate search providers

When you activate a search provider, new and updated articles start ingesting from the provider, and articles start appearing in the search results.

1. In the Customer Service admin center, under **Experiences**, select **Knowledge**.
2. On the **Knowledge** page, in the **Integrated search providers** section, select **Manage**.
3. From the **Inactive search providers** list, select a search provider, and then select **Activate**.
4. Select **Activate** again to confirm you want to activate the search provider.

Edit search providers

When you edit a search provider, your changes take effect with the next ingestion.

1. In the Customer Service admin center, under **Experiences**, select **Knowledge**.
2. On the **Knowledge** page, in the **Integrated search providers** section, select **Manage**.
3. Select **Active integrated search providers** or **Inactive integrated search providers** from the **All integrated search providers** list, and then select the search provider that you want to make changes to.
4. Select **Edit**.
5. On the **Search provider details** page, select the tab where you want to make changes.
6. Edit the information as needed.
7. Select **Save and Close**.

Deactivate search providers

When you deactivate a search provider, ingestion of new and updated articles from the search provider stops. Articles that have already been ingested no longer appear in search results.

1. In the Customer Service admin center, under **Experiences**, select **Knowledge**.
2. On the **Knowledge** page, in the **Integrated search providers** section, select **Manage**.
3. From the **Active search providers** list, select a search provider.
4. Select **Deactivate**.
5. Select **Deactivate** again to confirm you want to deactivate the search provider.

Configure search providers as search filters

Configure search providers as filters to search knowledge articles only from selected data providers. The filter works only if you have Dataverse Search enabled.

> **Note**
>
> If you have a custom layer on the Knowledge Articles Quick Find view, add `msdyn_integratedsearchproviderid` in **View columns** and **Find columns** to stop articles from appearing in search results.

1. In the Customer Service admin center, under **Experiences**, select **Knowledge**.
2. In the **Filters** section, make sure that **Enable search filters** is set to **Yes**.
3. From the **Select filter type** list, select **Integrated Search Dataprovider Id**, and then select **Add**.
4. Select the **Search** icon.
5. Select the search provider, and then select **Add**.
6. Optionally, to set predetermined search providers to appear for agents by default, switch **Set as preselected filter** to **Yes**.

If you select a deactivated data search provider, it might appear on the **Filter by** list, but no search results from the selected provider are returned.

Next steps

View and use insights for search providers
Search knowledge articles

Configure knowledge article schema mapping

Article • 09/15/2023

As part of adding an integrated search provider in Customer Service, you need to tell the service how to ingest the knowledge articles it receives from the provider. You do that by selecting and configuring a knowledge article schema. You can't change the schema after you save the configuration.

If you applied a language filter in the **Authentication and Testing** section, you must maintain the mapping for language locale either in the **JSON Schema** or in the **Knowledge article schema mapping** section. For more information on language locale values, go to: Language (LanguageLocale) table/entity reference.

To start, select an option in the **Knowledge article schema** section:

- **Field Mapping**
- **JSON Schema**

Field mapping

With field mapping, you map a knowledge article received from the search provider (the source property) to an attribute of the knowledge article entity (the target), based on an operation type. You need to use an operation type and then select the source property for the mapping.

- **Article attributes**: The knowledge article target field values.
- **Operation types**: The mapping patterns that map the source article to the article attributes of the knowledge article entity. Learn more about operation type mapping options.
- **Source property**: The value that you define for each operation type. For example, if you select the **Direct** operation type, you must select among the previously selected meta tags or the `HTML-Title` tag.

1. Save the article locally as a **Web Page, HTML Only** file. Make sure the file name is fewer than 99 characters.

2. In the Customer Service admin center site map, **Knowledge article schema** > **Field Mapping** section, upload the file by selecting **Choose file**.

All the meta tags found in your HTML file are listed in the **Meta tags settings** section.

3. Either select **Select all below meta tags** or select only the meta tags you need to map.

   The meta tags you select here become attributes you can select as source properties in the **Mapping** section. If you don't select any, only the default source properties **HTML-Title** and **HTML-Body** are available to map.

4. To go to the **Mapping** section, select **Next**. If you want to stop and come back to this point later, select **Save as draft**.

5. In the **Mapping** section, the mandatory knowledge article attributes are **External Reference Id**, **Title**, and **Content**. For each, select an **Operation Type** and a **Source Property**.

   Make sure the **External Reference Id** value is unique.

6. To add more article attributes, select **Add Row**, and then select an **Article Attribute**, **Operation Type**, and **Source Property**.

   You can also select **Delete** to delete an article attribute if needed.

7. Select **Validate mapping**.

   The service uses the values you entered to determine the values of the attributes against the HTML file you uploaded. It validates entries in the mapping table and Regex patterns. There are no validations for RegexUrl.

   If validation succeeds, you see a confirmation message. If validation fails, you see an error message. Depending on the error message, check either the entries in the mapping table or the regex patterns you entered.

8. Select **Next** to go the next section. If you want to stop and come back to this point later, select **Save as draft**.

JSON schema

Learn more about schema details to build a metadata mapping template.

1. Copy and paste your article properties and schema JSON in the field provided to you

2. Select **Validate JSON**.

If validation succeeds, you see a confirmation message. If validation fails, you see an error message that identifies the parameter that has an incorrect value.

3. Select **Next** to go the next section. If you want to stop and come back to this point later, select **Save as draft**.

Operation type mapping options

- **Regex**: Uses regex patterns to extract values from the source website. The source property is a text field where you can enter the regex pattern. The string from your website's HTML that matches this pattern is mapped to the corresponding knowledge article field.

  The regex patterns must have a capture group enclosed in parentheses that allows you to extract a specific portion of the matched text. The text is extracted from the first nonempty group of the first match.

  Here are some examples of regex patterns to extract content from a specific div tag:
  - Based on the div tag ID: `<div\b[^>]*id=\"your-id-name-here\"[^>]*>([\s\S]*?)<\/div>`
  - Based on the div tag class: `<div\b[^>]*class=\"your-class-name-here\"[^>]*>([\s\S]*?)<\/div>`
  - For content inside the body tag: `<body[^>]*>([\s\S]*)<\/body>`
  - For content inside the head tag: `<head[^>]*>([\s\S]*)<\/head>`

- **Direct**: Maps the value of any meta tag from its source website directly to any knowledge article field. The **Source Property** list shows all the meta tags extracted from the sample website along with source properties **HTML-Title** and **HTML-Body**, which are available by default.

  If you select **Direct** as the operation type and **og: url** as the source property, then the value of the **og: url** meta tag from the source property is mapped to the corresponding knowledge article attribute.

- **Constant**: Enter a constant value in any knowledge article field. The source property is a text field where you can enter the constant value.

- **RegexUrl**: Like Regex, but looks for matches in the URL of the source website only. To map the entire source website URL to a knowledge attribute field, select **Regexurl** in the operation type, and use the (. *) pattern in the source property.

Next steps

Manage integrated search providers

View and use insights for search providers

Article • 07/21/2023

After you add search providers to Customer Service, you can use the **Insights** tab in the Customer Service admin center to monitor ingestion. The tab displays the following details for the search provider: **Ingestion ID**, **Status**, **Crawl failures**, **Recognized**, **Created**, **Updated**, and **Failed**.

View insights

1. In the Customer Service admin center, go to **Knowledge** > **Integrated search providers (Preview)** > **Manage**.
2. Select **Active integrated search providers** or **Inactive integrated search providers** in the list, and then select a search provider.
3. Select the **Insights** tab.

The tab shows up to 100 ingestion IDs. The data is refreshed every 30 minutes.

Use insights

The **Failed** column shows articles that weren't ingested. To view the failed articles, select the ingestion ID.

The **Error type** column indicates whether the failure was a crawl error before ingestion or an ingestion run error.

See also

Troubleshoot issues with integrated search providers

Schema details to build a metadata mapping template

Article • 05/02/2023

This article describes the schema details required to map information from external data providers to the knowledge article entities, and how you can prepare your own schema mapping JSON file using various fields and attributes.

Fields

The following table lists the fields and field details that you must use in your JSON schema.

Field name	Definition	Required	Value
Name	Name of the field definition	No	A string indicating the name of the field.
UniqueTargetFieldName	Is the unique identifier or alternate key of the knowledge article entity. Typically, this field is the ID on the content provider side.	Yes	A string indicating the name of the field. You can set the value to "msydn_externalreferenceid"
ContentTargetFieldName	Field value shouldn't be changed.	Yes	Set the value to "content".
ApiPathLeafName	Field value should not be changed.	Yes	Set the value to "knowledgearticles".
List<FieldDefinitions>	Is a list of field definitions.	Yes	A set of definitions for the fields. See the following table for the list of supported fields for setting field definitions.

Field definitions

The following table lists the required and optional attributes that you can use in your metadata mapping schema.

Field name	Definition	Required	Value

Field name	Definition	Required	Value
TargetFieldName	Is the logical field name of the target attribute in the knowledge article entity.	Yes	Any string indicating the name of the target field
TargetFieldType	Indicates the type of the target field.	Yes	A string indicating the type of the field.
DocFieldSource	Indicates how the source field value will be identified and resolved at run time	Yes	Set the value to one of the following source types: • Regex • Meta • Constant • Url • Document To know about these data types, refer to the following Field source types section.
DocFieldPattern	Indicates the nature of the target field to be fetched.	No	Set this value based on the DocFieldSource value. See the examples below on how to set DocFieldPatterns.
MaxLength	Is the maximum length of the string that can be stored in the target field.	No. Can be used when **TargetFieldType** attribute is of type String	Int
UseRegexCapture	Stores the regex pattern that can be applied to the URL.	No. Can be used when the **TargetFieldType** attribute is of type String and **DocFieldSource** attribute is of type Url.	Url or String.

Field source types

The data in the external search providers can be set to any of the following field source types:

- **Regex**: Use to indicate a regular expression type of data.

- **Meta**: Use to indicate that the target field value is obtained from a <meta> tag in the source article
- **Constant**: Use to set a static value for the target field.
- **Url**: Use to indicate the URL of the external source document.
- **Document**: Use to indicate the HTML content of the article.

Considerations to build your own metadata mapping template

When you develop your own mapping schema, you must be sure to configure a few mandatory fields and set default values for some field definitions.

Your mapping template must include:

- The **UniqueTargetFieldName**, **ContentTargetFieldName**, and **ApiPathLeafName** fields. These fields must be set to their required values as follows:
  - Set the **UniqueTargetFieldName** to the out-of-the-box **msdyn_externalreferenceid** field or to a custom field. If you're using a custom field, then ensure that you add the field as an alternate Key. More information: Define alternate keys to reference Dynamics 365 records.
  - Include the **ContentTargetFieldName** field and set its value to "content".
  - Include the **ApiPathLeafName** field and set its value to "knowledgearticles".
  - Ensure that you provide mappings for both the **UniqueTargetField** and **ContentTargetField** fields in the **FieldDefinitions** list.

  Your mapping schema would look like:

  JSON

  ```
  {
    "Name": "{To be filled by you}",
    "UniqueTargetFieldName": "msdyn_externalreferenceid",
    "ContentTargetFieldName": "content",
    "ApiPathLeafName": "knowledgearticles"
    "FieldDefinitions": []
  }
  ```

- You must include the below **FieldDefinitions** list and populate its attributes such as **FieldUse**, **DocFieldSource**, **TargetFieldName**, and **TargetFieldType** with default values. Be sure to include the following fields and attributes with their values, "as-is", in your template. However, the Docfieldsource and Docfieldpattern for the title

and content value fields can be set by you to either **Regex**, **Meta**, **Document**, **Constant**, or **Url**.

JSON

```
  {
    "FieldUse": "Create",
    "DocFieldSource": "ArticlePublicNumber",
    "TargetFieldName": "articlepublicnumber",
    "TargetFieldType": "String"
  },
  {
     "DocFieldSource": "Constant",
     "DocFieldPattern": "true",
     "TargetFieldName": "msdyn_isingestedarticle",
     "TargetFieldType": "Boolean"
  },
  {
     "DocFieldSource": "Url",
     "TargetFieldName": "msdyn_ingestedarticleurl",
     "TargetFieldType": "String"
  },
  {
     "DocFieldSource": "DataProvider",
     "TargetFieldName": "msdyn_integratedsearchproviderid@odata.bind",
     "TargetFieldType": "String"
  },
  {
     "DocFieldSource": "Regex",
     "DocFieldPattern": "<title>(.*?)</title>",
     "TargetFieldName": "title",
     "TargetFieldType": "String"
  },
  {
     "DocFieldSource": "Url",
     "TargetFieldName": "msdyn_externalreferenceid",
     "TargetFieldType": "String",
     "UseRegexCapture": "^https://.*?/(.*?)/.*/.*?([0-9A-F]{8}[-](?:[0-
9A-F]{4}[-]){3}[0-9A-F]{12})$"
  },
  {
     "DocFieldSource": "Document",
     "TargetFieldName": "content",
     "TargetFieldType": "String"
  }
```

- After you've listed the mandatory fields and attribute information, you can include any additional metadata mappings and set your own custom values for them. For

example, you can include a Meta type of **DocFieldSource** and set any custom values for the attribute, as follows.

JSON

```
{
  "DocFieldSource": "Meta",
  "DocFieldPattern": "description",
  "TargetFieldName": "description",
  "TargetFieldType": "String",
  "MaxLength": 155
 }
```

Sample metadata mapping template

You can use the following metadata mapping JSON sample as template to build your own custom mapping template.

JSON

```
{
  "Name": "Integrated Search Data Provider Name",
  "UniqueTargetFieldName": "msdyn_externalreferenceid",
  "ContentTargetFieldName": "content",
  "ApiPathLeafName": "knowledgearticles",
  "FieldDefinitions": [
  {
    "FieldUse": "Create",
    "DocFieldSource": "ArticlePublicNumber",
    "TargetFieldName": "articlepublicnumber",
    "TargetFieldType": "String"
  },
  {
    "DocFieldSource": "Constant",
    "DocFieldPattern": "true",
    "TargetFieldName": "msdyn_isingestedarticle",
    "TargetFieldType": "Boolean"
  },
  {
    "DocFieldSource": "Url",
    "TargetFieldName": "msdyn_ingestedarticleurl",
    "TargetFieldType": "String"
  },
  {
    "DocFieldSource": "DataProvider",
    "TargetFieldName": "msdyn_integratedsearchproviderid@odata.bind",
    "TargetFieldType": "String"
```

```
      },
      {
        "DocFieldSource": "Regex",
        "DocFieldPattern": "<title>(.*?)</title>",
        "TargetFieldName": "title",
        "TargetFieldType": "String"
       },
       {
          "DocFieldSource": "Meta",
          "DocFieldPattern": "description",
          "TargetFieldName": "description",
          "TargetFieldType": "String",
          "MaxLength": 155
       },
       {
          "DocFieldSource": "Document",
          "TargetFieldName": "content",
          "TargetFieldType": "String"
        },
        {
          "DocFieldSource": "Url",
          "TargetFieldName": "msdyn_externalreferenceid",
          "TargetFieldType": "String",
          "UseRegexCapture": "^https://.*?/(.*?)/.*/.*?([0-9A-F]{8}[-](?:[0-
9A-F]{4}[-]){3}[0-9A-F]{12})$"
        }
    ]
 }
```

Transform, map external source data to knowledge fields

When you're mapping information from external data providers to knowledge article entities, if the source value is of a different data type, you'll have to transform the value before you can map it to the target knowledge field. More information: Transform and map external source data to corresponding target knowledge attribute

See Also

Manage integrated search providers
View and use insights for search providers

Customize knowledge article search filters

Article • 06/16/2023

You can configure standard and custom fields as filters to help your agents find the right content through knowledge search and thus improve their productivity.

The fields that are present on the knowledge article entity are the fields that are available as filters. Additionally, filters can be defined on fields that have the following data types:

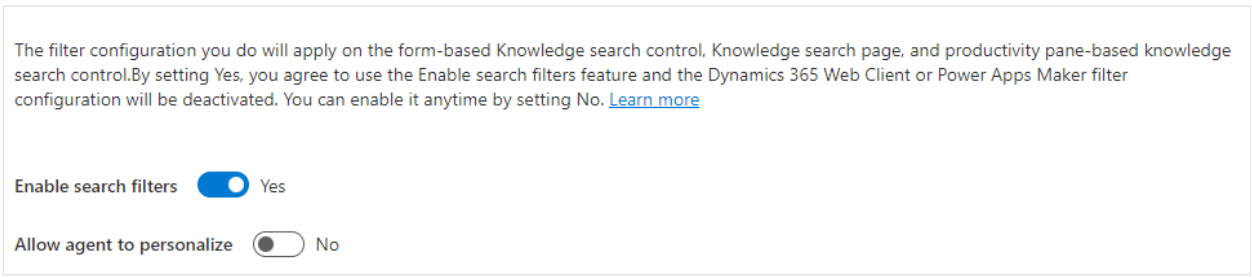
- Options set
- Multiselect options set
- Lookup
- Two choices
- Date and time

Any filter configurations that you set will be available wherever the knowledge search experience is configured, such as the form-based knowledge control, knowledge search page, productivity pane-based knowledge search control, embedded search control in Unified Service Desk, and the application tab search experience in Customer Service workspace.

The **Enable search filters** option is set to **Yes** by default. To disable search filters, you can set it to **No** on the **Filters** page.

If you choose to retain the **Enable search filters** option as **Yes**, then the filter configurations made in Power Apps will be deactivated. Additionally, the archived and discarded status filters will no longer be supported.

The settings that you've previously configured for your organization, including the default language configured for your organization in the Power Apps filter configurations, will no longer be applicable. You'll need to configure the language as default using the filter configurations.



Customize search filters

You can customize the search filters for knowledge articles in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to **Filters**.

   Customer Service admin center

   a. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
   b. On the **Knowledge** page, go to the **Filters** section and select **Manage**. The **Filters** page appears.

---

2. To enable agents to personalize knowledge article search filters:

   Customer Service admin center

   - Set the **Allow agent to personalize** toggle to **Yes**.

---

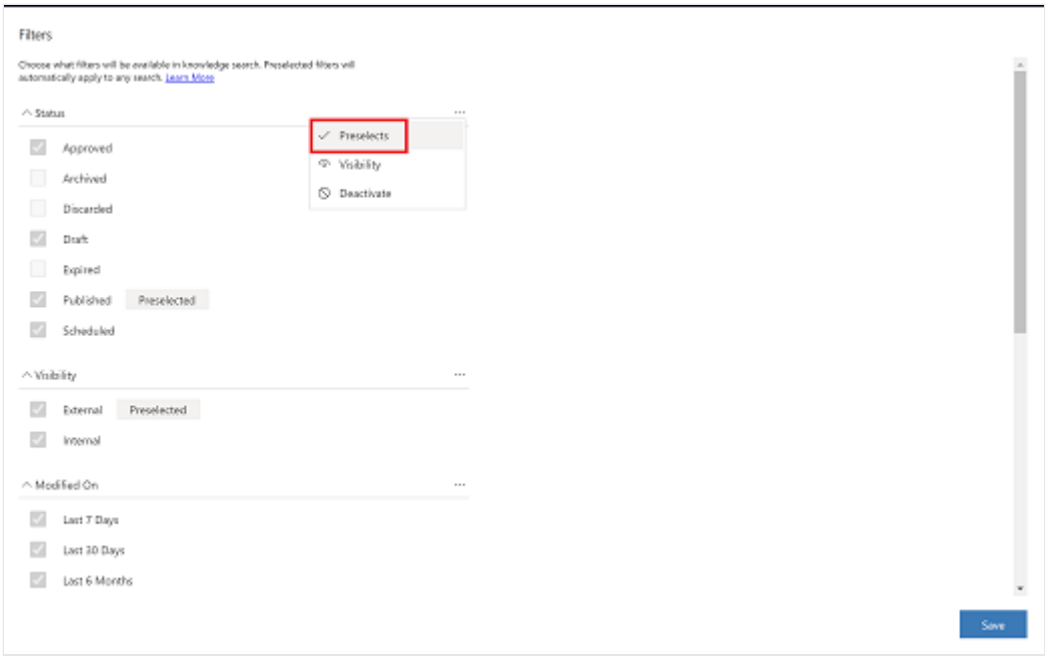
3. Select the filters you want to make available for knowledge search.

   Customer Service admin center

   - Move through the **Filters** page to view the filters.

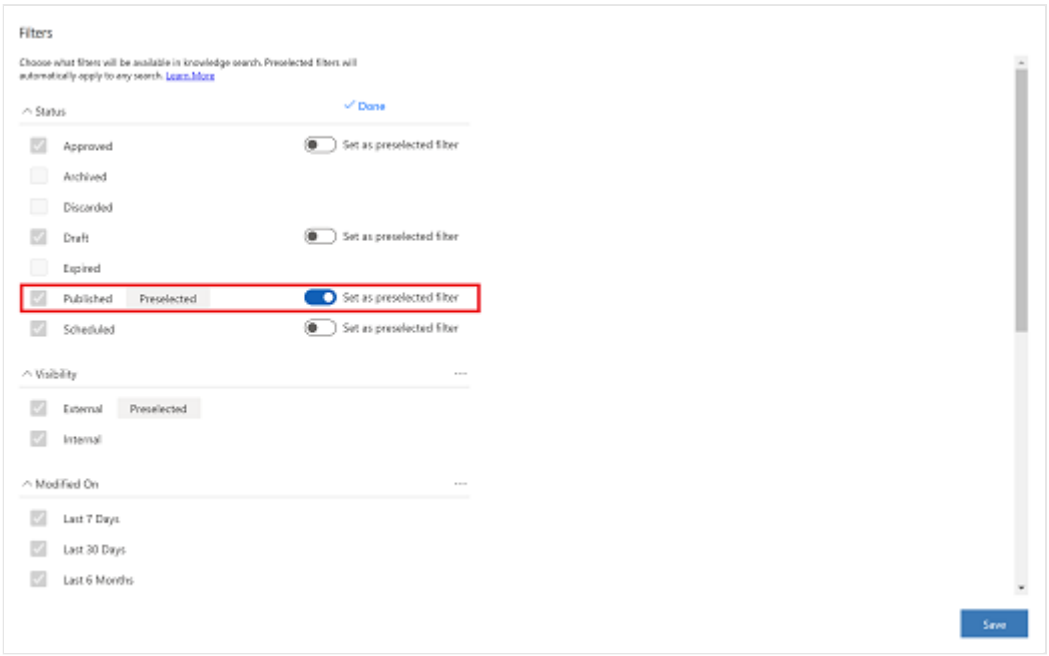
---

4. To set predetermined values that will appear for agents by default, select the ellipsis in the upper-right corner of a filter area, and then select **Preselects**.



5. To make a filter value available by default, turn on the **Set as preselected filter** toggle, so that **Preselected** appears next to the filter name, and then select **Done**.

   Values that are set as preselected automatically participate in the filtering without requiring the agent to manually select them. Only values made visible can be preselected.



6. If you want to set the filters that must be shown to the agent, select the ellipsis in the upper-right corner of a filter area, and then select **Visibility**.

7. Select the values that you want to show the agent, and then select **Done**.

8. When you're finished with configuring the values you want, select **Save**.

Enable custom fields as search filters

To configure custom fields as search filters for knowledge articles:

1. Enable the standard search filters.
2. Add the custom fields to the Quick Find view columns. To add a field to the Quick Find view column, see Configure searchable fields for Relevance Search.

Additional configuration settings

- If Dataverse Search is enabled and if you have selected the **Archived**, **Discarded**, or **Expired** values for the **Status** filter, articles that contain these values will not be displayed.
- To view these articles in your Dataverse Search results, you must delete the **Archived**, **Discarded**, **Expired**, and **Is Latest Version** filters in the **Quick Find Knowledge Article** > **Edit Filter Criteria** dialog.

> **Note**
>
> These filters will only work if you have Dataverse Search enabled.

Add a default filter configuration

The following steps apply to these data types:

- Options set
- Multiselect options set
- Two choices
- Date and time

You can add a default filter in the Customer Service admin center or Customer Service Hub app by performing the following steps:

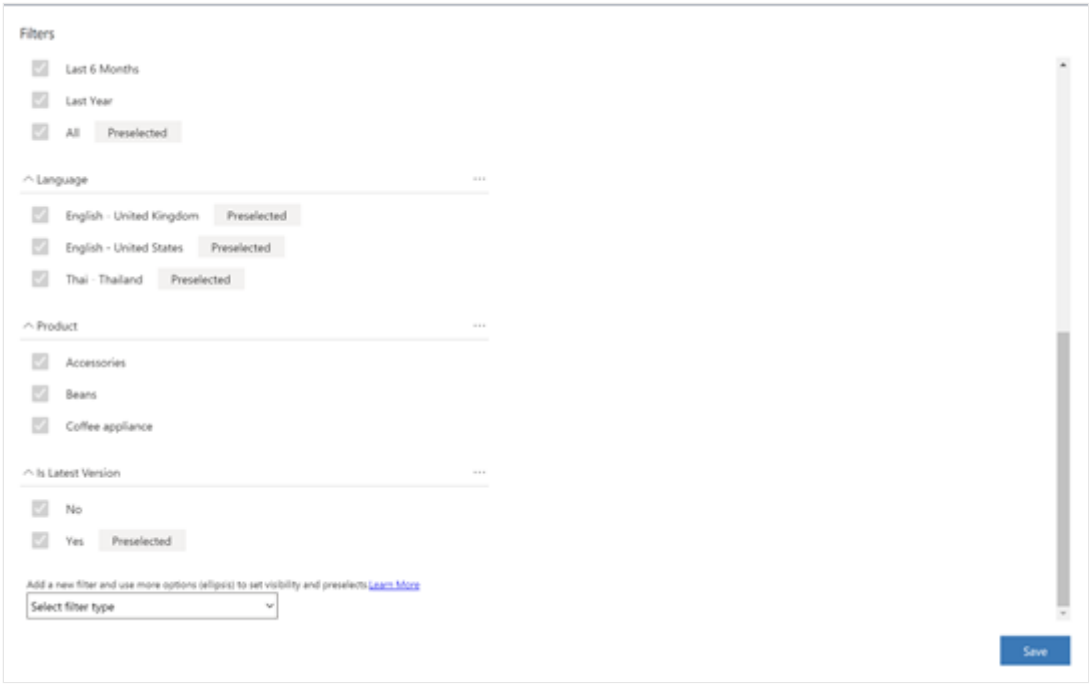
1. Go to the **Filters** page.

   Customer Service admin center

   a. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.

b. On the **Knowledge** page, go to the **Filters** section and select **Manage**. The **Filters** page appears.

2. Scroll to the bottom of the page, select the filter type you want from the dropdown list, and then select **Add**. The filter is added to the page.



3. Customize the filter according to your requirements by selecting or deselecting the values displayed, and then turn on the **Set as a preselected filter** option if you want the filter to be shown to the agent by default.

4. Select **Save**.

Configure fields with data type as lookup as filters

Some configurable filter values may include lookup types, where there are numerous value options that can be set. Some examples of these filters are Created by, Modified by, and Owner. For these types of values, when you add the filter, you can manually search for and select the records that you want to use.

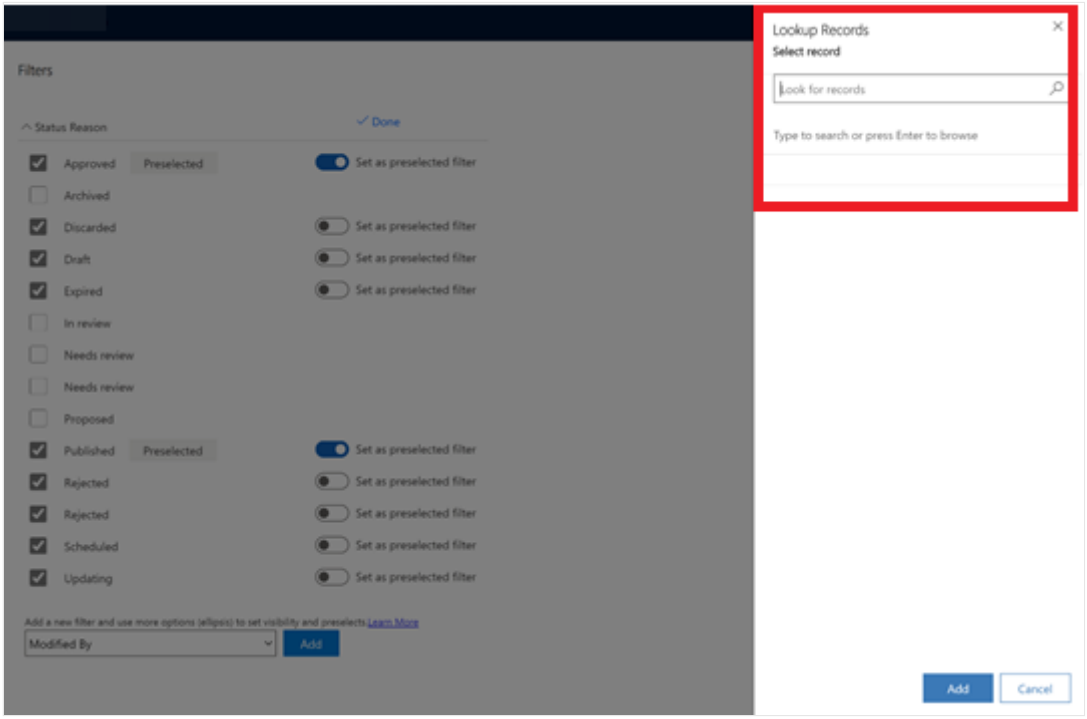
You can configure a lookup type filter in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Filters** page.

Customer Service admin center

a. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
b. On the **Knowledge** page, go to the **Filters** section and select **Manage**. The **Filters** page appears.

2. Scroll to the bottom of the page, select the filter type you want from the dropdown list, and then select **Add**. The **Lookup Records** flyout menu is displayed.



3. To find the values you want, either enter the value details in the field or select the search icon to list the available records.

4. Select the records that you want in the results, and then select **Add**.

5. If you want to set the values as defaults, turn on the preset next to the filter to the right so that **Preselected** appears next to the filter name.

6. Select **Save**.

Deactivate or reactivate a filter configuration

There may be times when you want to temporarily suspend a filter configuration but don't want to lose the configuration settings. You can deactivate a filter configuration and then reactivate it later on.

> ⓘ **Note**

If you deactivate or delete all of the filters, then agents will see the following message on the personalization page: "No filters have been configured. Contact your administrator."

Keep in mind the following:

- If you delete a knowledge article field for which a filter has been created, your agents won't see the filter, and they won't be notified about the change in the UI. You, as the administrator, will see the filter with a message indicating that it has been deleted.
- If you deactivate the filter, it will show as deactivated to you as the administrator, but your agents won't see the filter on the knowledge control. When the filter is activated again, the filter configuration will remain as it was previously configured.
- If an agent doesn’t have permission to see a specific field because of field-level security, then a filter created on that field won't be visible to the agent.
- Filters that are available in the default, out-of-the-box configuration can't be deleted.
- If an agent sets default values, those values will persist and cannot be overwritten by changes made by an administrator.

You can deactivate or reactivate a filter configuration in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Filters** page.

   Customer Service admin center

   a. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
   b. On the **Knowledge** page, go to the **Filters** section and select **Manage**. The **Filters** page appears.

---

2. Select the ellipsis in the upper-right corner for the filter you want to deactivate, and then select **Deactivate**.
3. Select **Done** > **Save**.
4. When you are ready to reactivate the filter, go to the **Filters** page, select the ellipsis next to the value you want to reactivate, and then select **Activate**. All of the previous configurations will be reinstated.

Allow agents to personalize their knowledge article search filters

You may have scenarios within your organization where agents are working on different areas and don't all need the same filter settings. For example, an organization may have agents working on different product areas. One agent might need to see knowledge articles for Product A, while another agent might only want knowledge articles for Product B, and so forth.

You can allow your agents to personalize the knowledge article search filters for their areas, from the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Settings** page.

   Customer Service admin center

   a. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
   b. In the **General settings** section, select **Manage**. The **General settings** page appears.

2. Customize the filter according to your needs by selecting or deselecting the values displayed and then turn on the **Set as a preselected filter** toggle if you want the filter to be shown to the agent by default.

   > **Note**
   >
   > This option will be available only if **Enable custom filters** is set to **Yes**.

3. Select **Save**.

After you've enabled the option, your agents will be able to view all the configurations that you previously set for them and personalize the knowledge search filters for their areas.

Create and manage categories

Article • 04/04/2022

Using the **Categories** entity, you can create hierarchical categorical data to help group records. Categorizing entity records in Dynamics 365 Customer Service helps you tag the records so that you can easily search them. Use the entity to create and manage a logical structure of categories in Dynamics 365 Customer Service, and then associate entity records to one or more categories.

Categories are useful for reporting, sorting, segmenting, and categorization of records.

Create a category

Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

Check your security role

- Follow the steps in View your user profile.
- Don't have the correct permissions? Contact your system administrator.

You can create a category in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Categories** page.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
2. In the **Categories** section, select **Manage**. The **All Categories** view is displayed. You can switch between various system views using the dropdown list.

Create templates for articles

Article • 02/15/2022

Article templates help you create new articles for your organization's knowledge base library. You can also create templates with boilerplate text to help article writers use consistent language and messaging.

> **Note**
>
> This experience is applicable only to legacy Articles entity and not the new Knowledge Article entity.

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. In the web app, go to **Settings** ( ) > **Advanced Settings**.
3. Select **Settings** > **Service Management**.
4. Select **Article Templates**.
5. To create a new article template, select **New**.
6. In the **Article Template Properties** dialog box, type the new article title, select the language, and then select **OK**.
7. To add a section, in the **Common Tasks** area, select **Add a Section**, and specify the following:

   a. In the **Title** box, type a title.

   b. In the **Instructions** box, type a description of the information that users should provide in this section when they use this template.

   When a user creates a new article with this template, these instructions appear in the body text for this section, and disappear when the user starts typing.

8. To reposition a section from the template, select the section you want to reposition, and in the **Common Tasks** area, select the green arrows to move the section to the position you want.

   When you select a section, its border turns green and the border lines become solid.

9. To remove the section, select the section you want to remove, and in the **Common Tasks** area, select **Remove a Section**.

10. To edit a section, select the section you want to edit, and in the **Common Tasks** area, select **Section Properties**. Edit the title and description.

11. To format the text, font, and color of the article title, headings, and body text of each section, use the tools on the **Modify** toolbar.

12. When you're done, select **Save** or **Save and close**.

    After you save the template, it is immediately available for use. If the template is not complete and you want to finish it later, you can save the template, deactivate it (make it ready-only), and then complete it later. When the template is complete, you can reactivate it.

> **Note**
>
> If you need to back up your templates, or export them for use in a different implementation, you can export them as part of exporting customizations. More information: **Export your customizations as a solution**.

See also

eBook: Use KB articles to help your customers

Integrate knowledge management in Dynamics 365 with Power Virtual Agents bots

Article • 11/17/2022

Integrate knowledge management with a Power Virtual Agents bot to use customized conversations. Bots help answer questions, perform actions, and solve simple problems. This frees up your agent's time to deal with complex issues that need human intervention.

Power Virtual Agents lets you configure bots with various topics and trigger phrases to automatically resolve questions posed by your customers on your portal page. More information: Power Virtual Agents overview

You can integrate knowledge management with a Power Virtual Agents bot by using either of the following ways:

- Search Dynamics 365 knowledge articles
- Power Automate flow template

Prerequisites

- Dataverse search must be enabled for the integration. You must have a system administrator role to be able to enable Dataverse search. More information: Configure Dataverse search for your environment
- You must perform the following two steps before you begin the integration.

    1. Create and publish knowledge articles to a portal created in Power Apps.

        Set up your portal with the Power Apps portals feature before integrating knowledge management with the Power Virtual Agents bot. More information: Use settings to set up knowledge management. For more information on setting up your Power Apps portal, see: Power Apps portal documentation.

        You can create and manage knowledge articles by setting the **Internal** field to **No** in the Microsoft Datverse Web API. More information: knowledgearticle EntityType

    2. Create a Power Virtual Agents bot and a topic in it.

- For more information on creating a bot, go to Create and delete Power Virtual Agents bots.
- For more information on creating a topic, go to Create and edit topics in your Power Virtual Agents bot.

Use the Search Dynamics 365 knowledge article flow action

Perform the following steps if you want to integrate a Power Virtual Agents bot with knowledge management using the **Search Dynamics 365 knowledge articles** action:

1. Set connection references.
2. Add the action to the Power Virtual Agents topic.

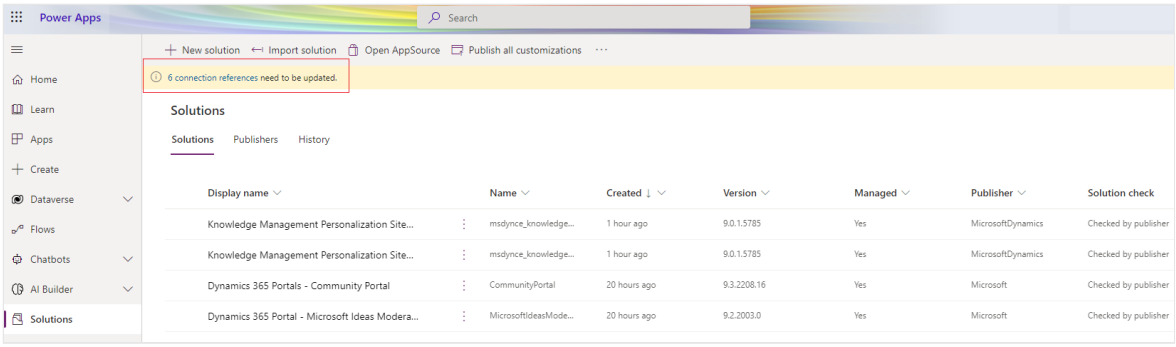
Set connection references

Knowledge management integrated with Power Virtual Agents solution uses the flow with connections, such as **Content Conversion** and **Microsoft Dataverse**. You must configure these connection references before turning the **Search Dynamics 365 knowledge article flow** action on.

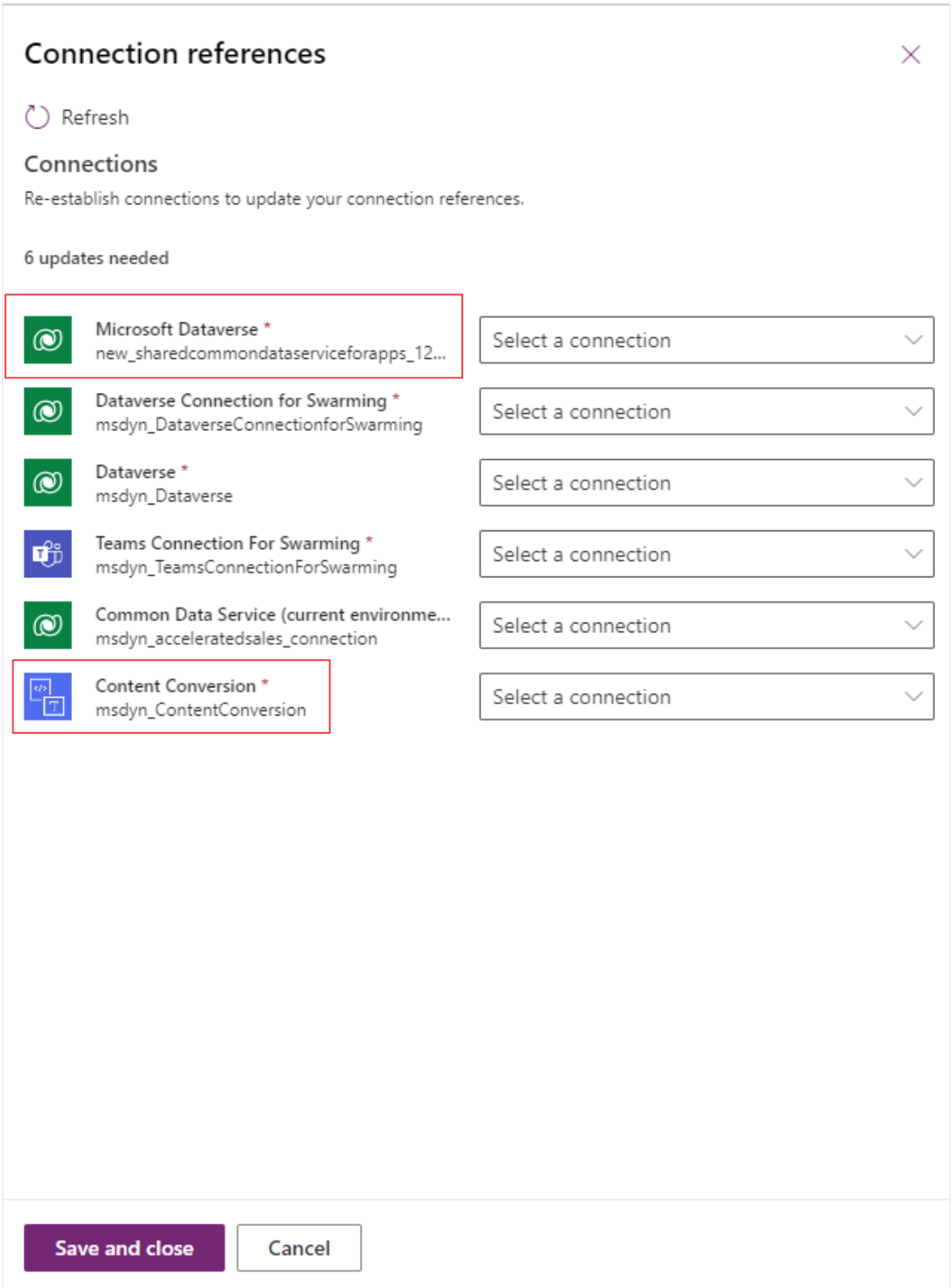
> **Note**
>
> - If you have the Environment Maker role and can't see either the notification for connection references or the cloud flow, then you don't have the permission to update them. You must contact your system administrator or system customizer to set the connection references and enable the flow.
> - When the solution is imported from a test environment to the production environment, you must again set up the connection references as a system administrator. For more information on importing, go to **Export and import bots using solutions**.

To set connection references:

1. Go to make.powerapps.com.
2. Go to **Solutions**. The **Solutions** page displays a notification with a link to configure connection references.



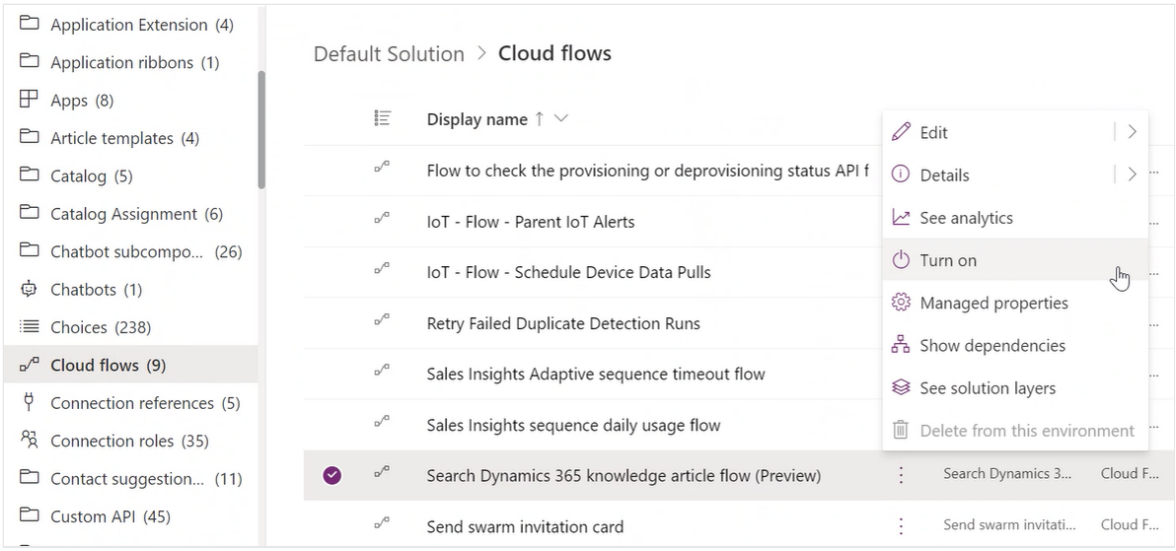
3. Select the link. If you don't see the notification on the **Solutions** page, go to **Default Solutions** > **Connection references**.



4. Select the connections for **Microsoft Dataverse** and **Content Conversion** on the **Connection references** page.

5. Select **Save and Close**.

6. Go to **Default Solution** > **Cloud flows** and turn on **Search Dynamics 365 knowledge article flow** flow.



Add the action to the Power Virtual Agents topic

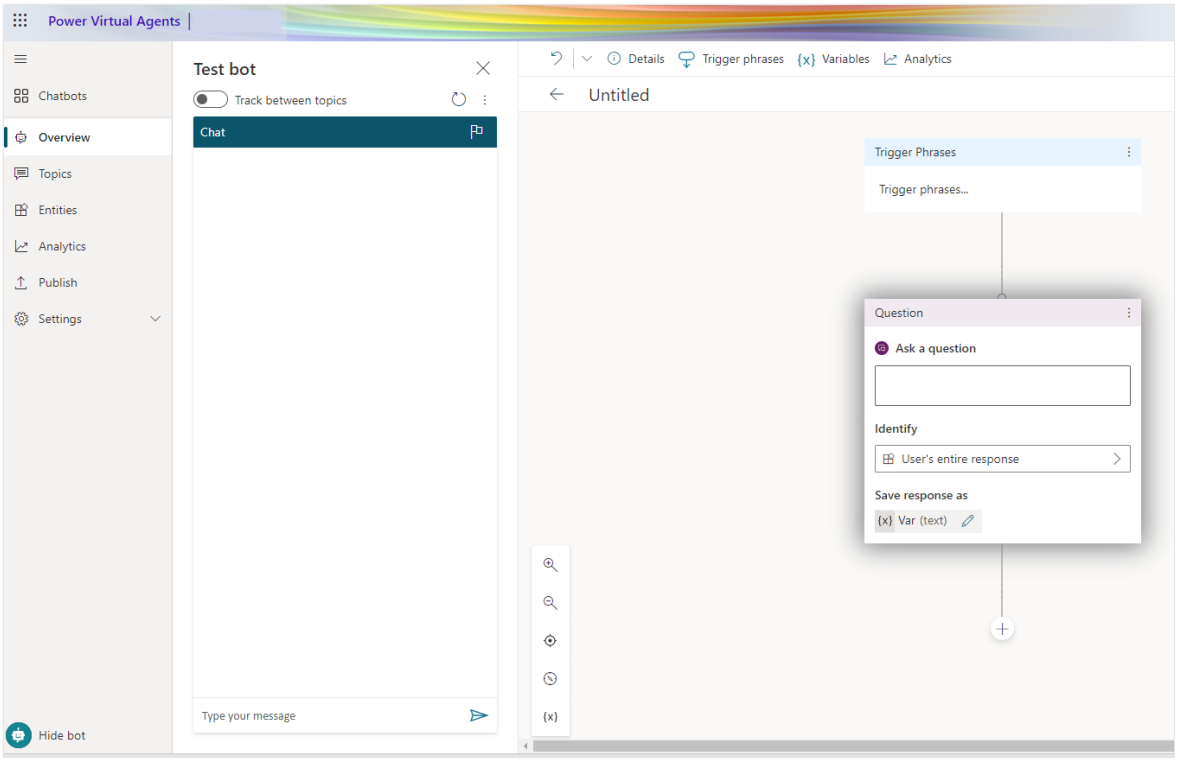
After you configure the connection references in make.powerapps.com, go to **Chatbots** > **List** and select the required chatbot. This will take you to the Power Virtual Agents portal where you can create a topic. If you need to create a chatbot, see Create chatbots from Power Apps.

You can create a topic with two question nodes for search text and filter, or you can configure the search integration to set up a fallback topic in case of an unrecognized search phrase. More information: Configure the system fallback topic in Power Virtual Agents

If you're creating a topic with two question nodes, for the filter question node, the Power Virtual Agents author can provide a sample filter value; for example, **statecode eq 3**.

Perform the following steps to ensure that flow is properly configured and can now be replaced with **Search Dynamics 365 knowledge articles** action.

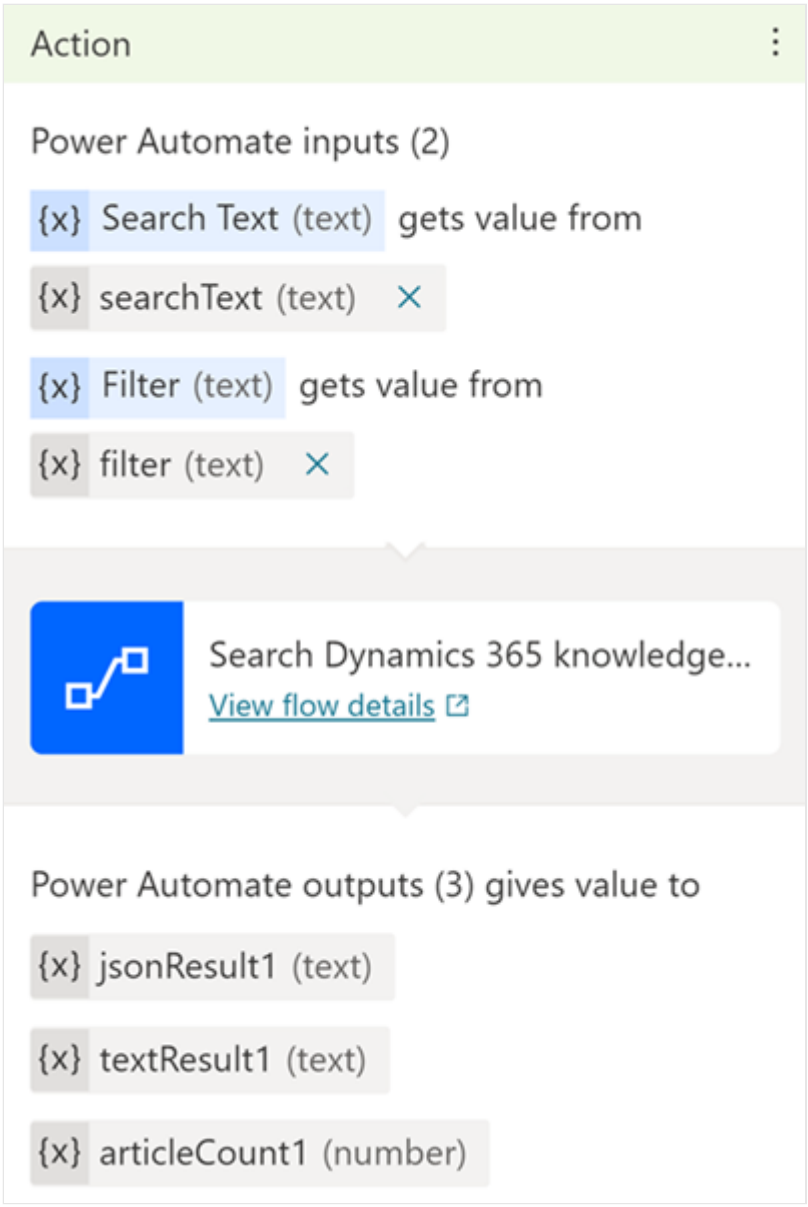
1. On the Power Virtual Agents portal, select **Topics** > **New Topic**.
2. Within the topic, create a question node to ask the user to search for the input text.



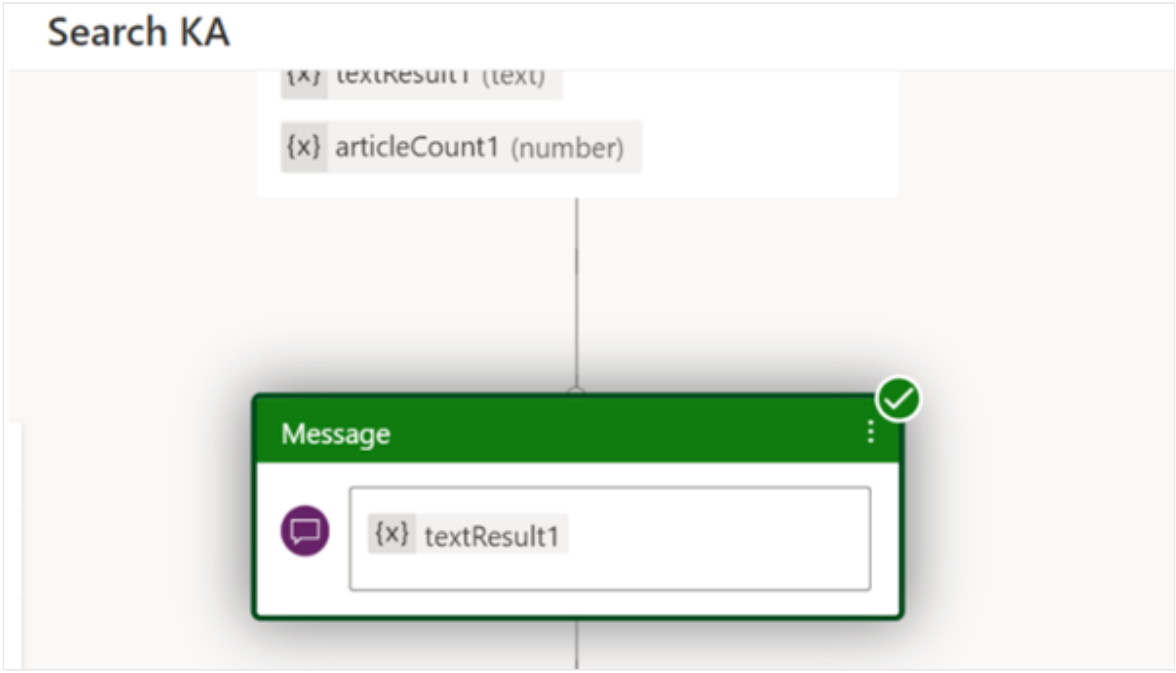
3. Create a question node for the filter and provide the sample filter value after you trigger the topic.

4. Select **Add node** (+) and select **Call an action**. Select **Search Dynamics 365 knowledge article flow** action.

5. Provide the input to the flow. An error might appear if the filter isn't provided to the flow.



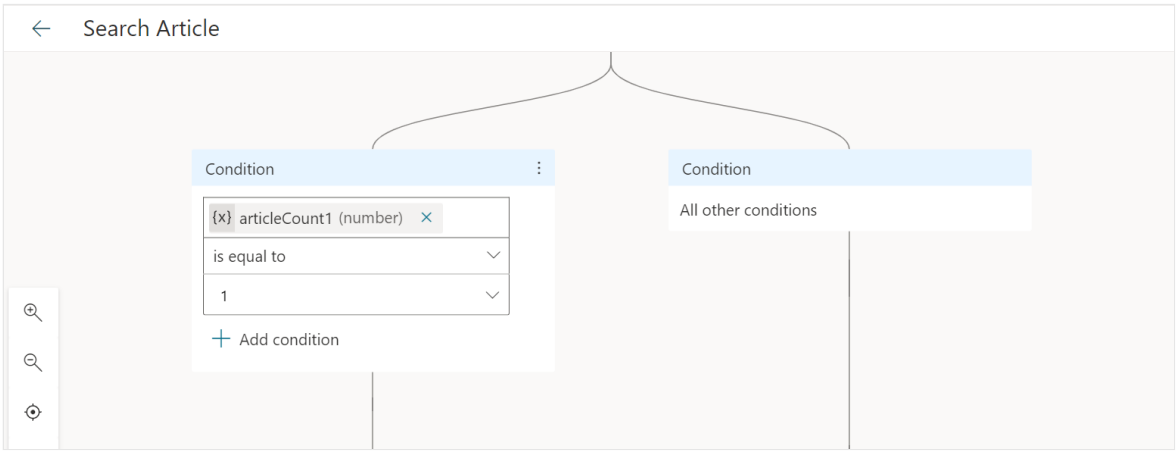
6. Add a message node to show the results returned by the flow. More information: Render results



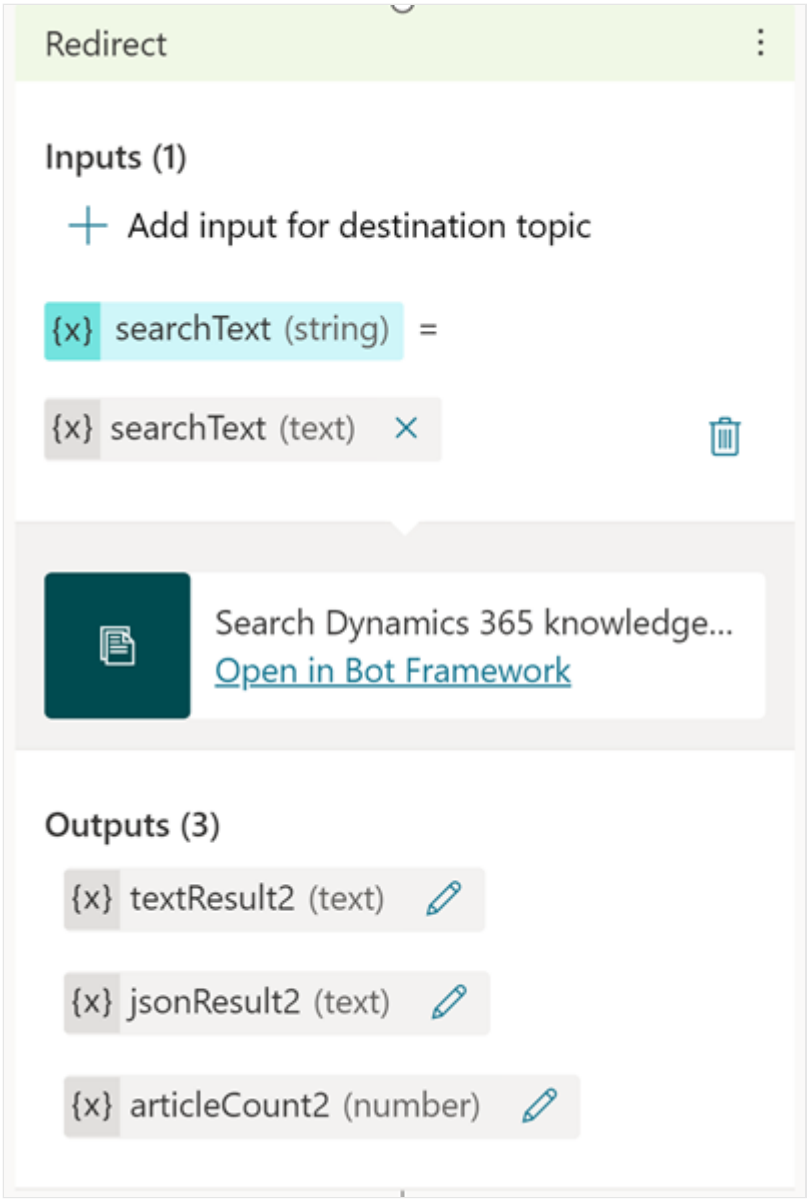
7. Select **Save**.

8. Use the trigger phase and run the topic to verify the flow.

> **Tip**
>
> If your search doesn't return any results, modify the search terms or filter conditions. You can also add a filter condition if required.



9. After the topic is configured, replace the **Search Dynamics 365 knowledge article flow** with the **Search Dynamics 365 knowledge articles** action. You can now configure any bot in the organization to access knowledge articles using the **Search Dynamics 365 knowledge articles** action.



10. Remove the filter question node. More information: Work with filters.

11. Update the message node with the output from the action and select **Save**.

Work with filters

- By default, the search is performed on the external published articles (**statecode eq 3** and **isinternal eq false**). If you need to perform additional filtering, you can set the required filter query as the Filter (text) input variable.
- To check which filters you can use and the attributes of the knowledge article entity, go to knowledgearticle EntityType.
- To write a Dataverse search query using filters, go to Working with operators.
- To see filter conditions that aren't supported by Dataverse search, see Configure Dataverse search to improve search results and performance .
- To filter on a string attribute like keywords, append the string value to the search text.

Publish the changes

For details on publishing the bot, see Publish the latest bot content. If you get errors during publishing, see Troubleshoot.

Use the Power Automate flow template

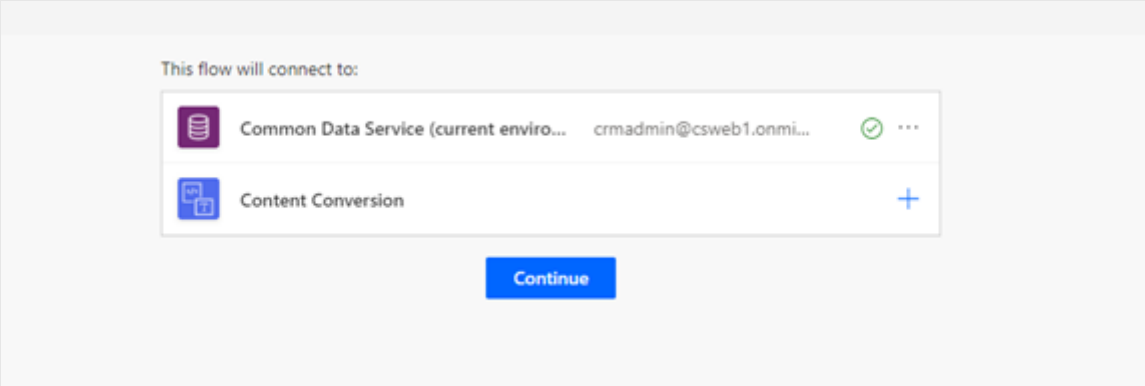
Perform the following steps if you want to integrate a Power Virtual Agents bot with knowledge management by using the Power Automate flow template:

1. Create a flow using the template.
2. Add the solution's flow to the Power Virtual Agents topic.

Create a flow using the template

1. Go to powerautomate.microsoft.com.

2. On the templates page, search for the **Generate answers from Dataverse knowledge articles to Power Virtual Agent** template.



3. Select **Continue**. You'll be redirected to the Power Automate flow template.

4. Save the template, and then select **Solutions**. You might be prompted with a message on which you can select **OK**.

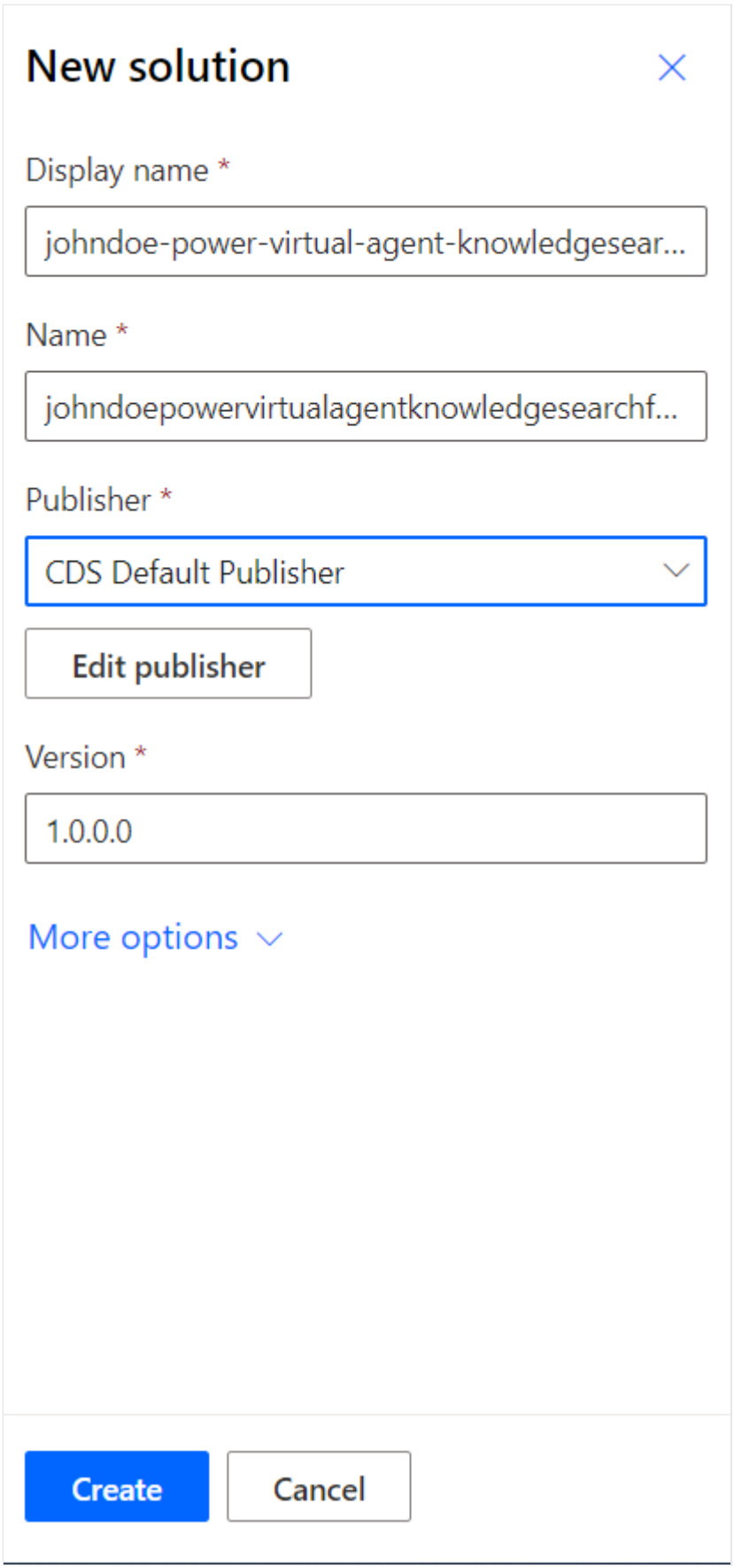
5. Select **New solution**.

6. Enter a display name. The list of solutions includes every solution in your organization. Choose a naming convention that helps you filter to just your solution. For example, you might prefix your email to your solution name: *johndoe-power-virtual-agent-knowledgesearch-fallback*.

7. Select your publisher from the list of choices.

8. Accept the default values for name and version.

9. Select **Create** to complete the process.



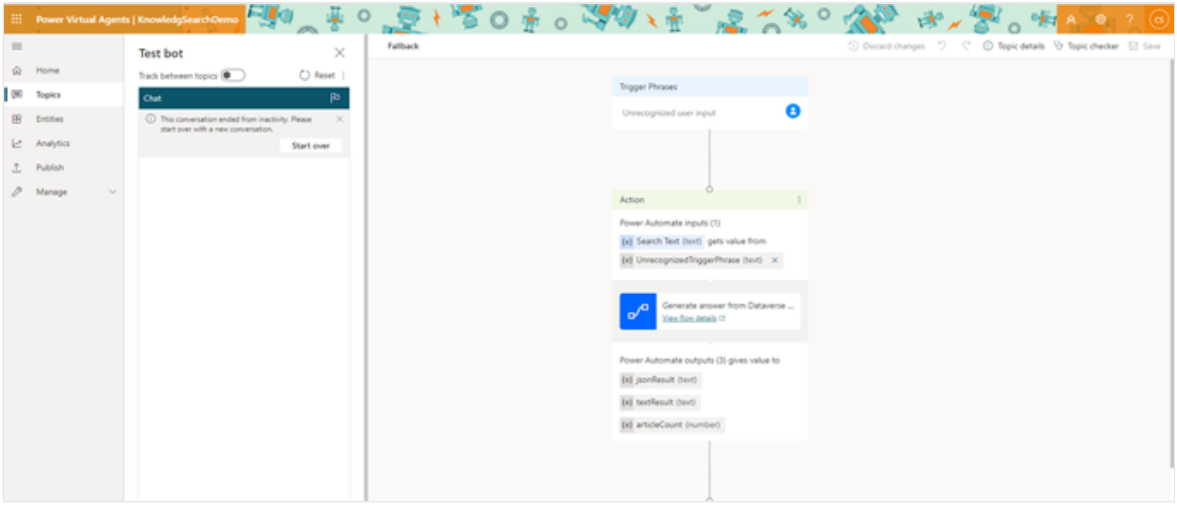
10. In the list of solutions, select the solution you just created. It should appear at the top of the list. If it doesn't, search by the convention you used in step 6 to name the solution.

11. In the solution, select **Add existing**, and then select **Cloud Flow** from the list.
12. In the **Outside solutions** list, select your flow, and then select **Add** to complete the process. If there are several flows, look at the **Modified** column to find the most recent version.

For more information on managing Power Virtual Agents solutions, go to Export and import bots using solutions.

Add the solution's flow to the Power Virtual Agents topic

1. Open the browser with the authoring canvas.
2. Above the **Message** action box, select the connector, and select **Call an action**.
3. From the pop-up flow window, select the new flow named **Generate answer from Dataverse knowledge articles for Power Virtual Agent**. The new action appears in the flow.
4. To correctly set the input variable to the action, select **Select a variable**, and then select **bot.UnrecognizedTriggerPhrase**.



5. To return the knowledge article search results to the bot, go to Render results.

Render results

To return the knowledge article search results to the bot, follow either of these steps:

- Use thumbnail cards to show the article. More information: Respond with cards
- Use the following sample code to render search results in adaptive cards.

#kbcardjson()

```
-
{

  "type": "AdaptiveCard",

    "body": [

        {

            "type": "ColumnSet",

            "columns": [

                {

                    "type": "Column",

                    "items": [

                        {

                            "type": "Image",

                            "height": "35px",

                            "url":
"https://th.bing.com/th/id/R4fbade037f8209666b06aa22641708fc?
rik=ya%2bpnPJ41EFFMg&riu=http%3a%2f%2fmolnar-
institute.com%2ffileadmin%2f_processed_%2fcsm_KnowledgeManagement_icon_forWe
bsite_bcda89676b.png&ehk=J%2bz2G15xtbJgd7ssSXo7X2q7LDLaMGl7EuGUSQU6P2s%3d&ri
sl=&pid=ImgRaw",

                            "size": "Small"

                        }

                    ],

                    "width": "auto"

                },

                {

                    "type": "Column",

                    "items": [

                        {

                            "type": "TextBlock",
```

```
                            "weight": "Bolder",
                            "text":
"${json(virtualagent.jsonResult).articles[0].title}",
                            "wrap": true,
                            "size": "Large"
                        },
                        {
                            "type": "TextBlock",
                            "spacing": "None",
                            "text": "Last modified on
${json(virtualagent.jsonResult).articles[0].modifiedon}",
                            "isSubtle": true,
                            "wrap": true
                        }
                    ],
                    "width": "stretch"
                }
            ]
        },
        {
            "type": "TextBlock",
            "text":
"${json(virtualagent.jsonResult).articles[0].description}",
            "wrap": true,
            "size": "medium"
        }
    ],
    "actions": [
        {
```

```
            "type": "Action.OpenUrl",
            "title": "View article in Dynamics App",
            "url": "${json(virtualagent.jsonResult).articles[0].crmAppUrl}"
        }
    ],
    "$schema": "http://adaptivecards.io/schemas/adaptive-card.json",
    "version": "1.0"
}
```

Troubleshoot

- If a dialog is cross-linked and is modified, you'll see a validation error on publish and Power Virtual Agents will block the publish. More information: Publish the latest bot content
- If errors exist while saving a topic, the **Topic checker** shows the impacted topics. Errors will prevent the bot from working and must be fixed before you can publish your bot. More information: Topic errors
- For more information on flow error codes, go to Error codes: Power Virtual Agents

See also

Create and edit topics

Configure origins allowlist for knowledge articles

Article • 09/29/2023

You can configure an origins allowlist to ensure that knowledge authors add only safe links to their knowledge articles.

> **Important**
>
> The supported origins are HTTP or HTTPS protocol, IP address or domain name, and TCP port number. For example, **https://www.contoso.com**, **https://www.contoso.com:443** are supported origins. Knowledge authors must use only links with origin links as specified in the supported origins list.

After you've enabled this feature while creating knowledge articles, if knowledge authors add links whose origin links don't match any of the links specified in the origins list, an error message displays for links that are hosted within an iframe. For example, if you add https://www.contoso.com in the origins list, knowledge authors can use https://www.contoso.com/about or https://www.contoso.com/overview. But if they use https://contoso.com/about or https://contoso.com/overview in the articles, the links will be broken and an error message is displayed. Also, in the **Content** field on the knowledge article form, knowledge authors see the following message: "Update your origins allowlist if any iframe in the article doesn't work or displays error."

For published articles, agents and portal users see an error message in the article for the links that are hosted within an iframe. In such cases, you must update the origins list so that all the existing iframe links continue to work.

Configure origins allowlist

You can configure the origins allowlist in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Settings** page.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.

2. In the **General settings** section, select **Manage**. The **General settings** page appears.

4. Go to **Origins allowlist** and add your links to the **Add origin links** field.
5. Select **Add** + or **Enter** to add the link to your list.
6. Select **Save**.

To remove a domain, select **Close** next to the domain name.

See also

Create and manage knowledge articles
Search knowledge articles
Search the knowledge base on portals

Configure knowledge search control on app side pane for an entity record

Article • 06/09/2022

Introduction

You can configure how you want the knowledge base search control to appear for your entities on the app side pane of Customer Service workspace and Omnichannel for Customer Service. To do so, you'll need to first add the record types for which you want to turn on knowledge management and then configure the record type settings.

Configuring a record type will specify the information that your agents will see while they interact with customers. **Case** and **Conversation** record types are enabled by default. The **Conversation** record type will be available by default if you have purchased add-on SKUs, such as Chat, Digital messaging, or Voice. If you're an existing user, you'll also see all the entities previously enabled by you.

Add record types for which you want to turn on knowledge management

Go to the Customer Service admin center or Customer Service Hub app, and perform the following steps:

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent Experience**.
2. On the **Knowledge** page, in the **Record Types** section, select **Manage**.
3. On the **Record Types** page, select **Add**. The **Add record type** dialog appears.
4. On the **Add record type** dialog, from the **Select record type** dropdown list, select the record type.
5. Select **Save and Close**.

After you've enabled a record type, to set up knowledge base search control on a standard or custom form, see Add the Knowledge Base Search control to forms. Setting up knowledge base search control on a standard or custom form makes it easy for agents in your organization to find knowledge articles, so they can answer common

customer questions and resolve their issues right from the records, without having to switch to a different application.

To set up knowledge search control on the app side pane, see Configure knowledge search control on the app side pane.

Configure knowledge search control on the app side pane

After you've added the record types for which you want to turn on knowledge management, you can configure the knowledge search control on the app side pane by editing the record type. The app side pane is available only in Customer Service workspace and Omnichannel for Customer Service. For more information on how to set up an app side pane, go to Configure productivity pane.

> **Note**
>
> You can configure the knowledge settings for record types from the Customer Service admin center app only. You'll also be able to view and edit the record types that you've previously enabled in Customer Service Hub.

To edit an entity record:

1. In the Customer Service admin center, on the **Record Types** page, select the entity you want to edit.
2. Select **Edit**. The **Knowledge settings** dialog appears.
3. In **Automatic search**:
    - Set the **Turn on automatic search** toggle to **Yes**, if you want automatic search to be enabled for your entity record.
    - From the **Provide search results using** dropdown list, select the field by which the search results will be provided for the entity.
4. In **Actions**, select the checkboxes as required for the following:
    - **Link / unlink article**
    - **Copy URL**
    - **Link article and email URL**
    - **Link article and send article content**

5. In **Email recipient**, from the **Select default email recipient** dropdown list, select the email recipient. The **Email recipient** option is available only to the Customer or Lookup attribute type, and to the Account or Contact lookup entity.

6. Select **Save and Close**.

Knowledge settings

Set up knowledge search in the app side pane for Customer Service workspace and Omnichannel for Customer Service. Learn more

Automatic search

Use text from a selected field to provide search results automatically.

Turn on automatic search Yes

Provide search results using *

Case Title

Actions

Add actions for agents to perform on this record. Learn more

- [x] Link / unlink article
- [x] Copy URL
- [x] Link article and email URL
- [x] Link article and send article content

Email recipient

Set the default email recipient for this record.

Select default email recipient

Customer

Save and close Cancel

See also

Add the Knowledge Base Search control to a form

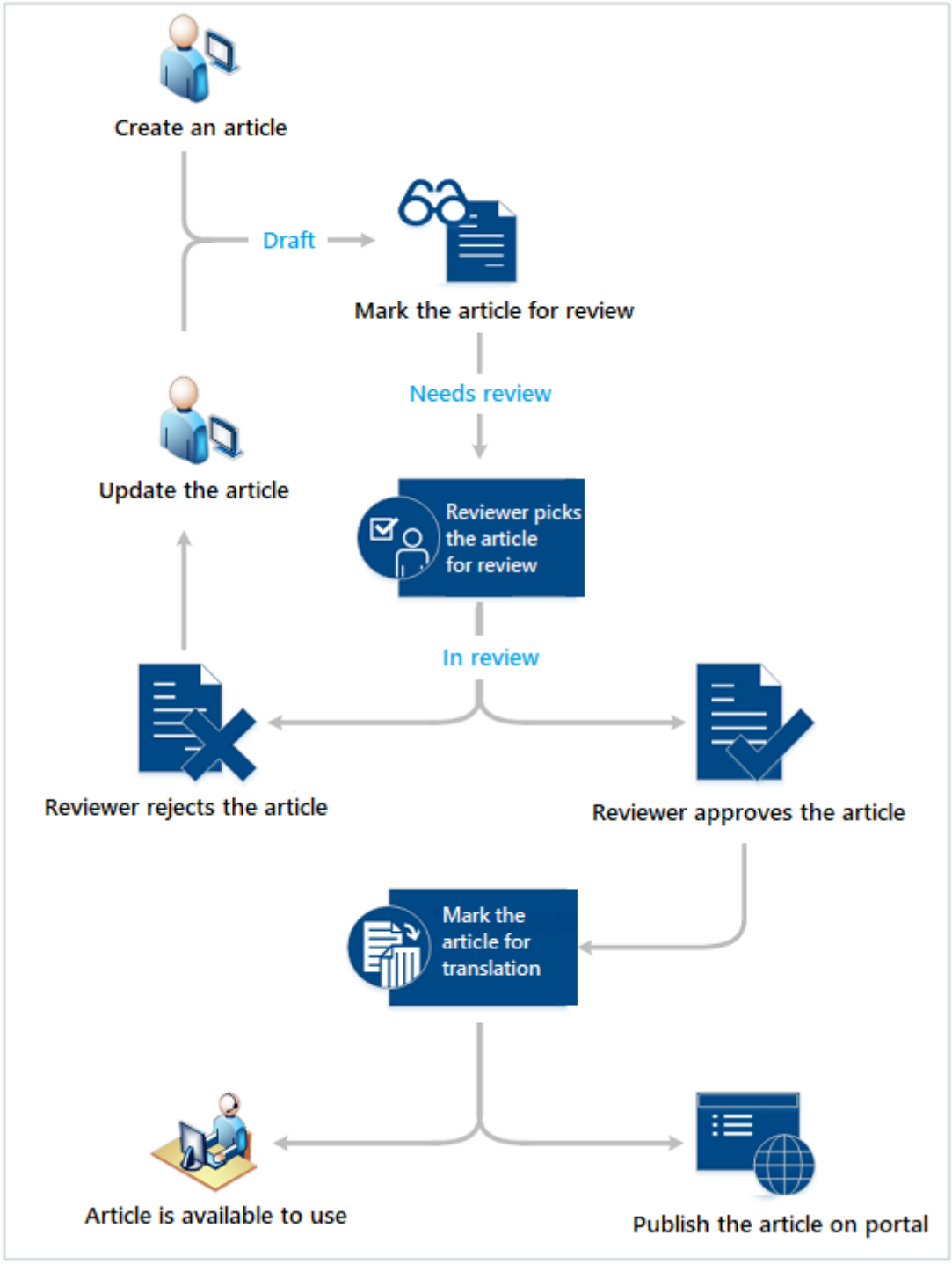
Understand the knowledge article creation process

Article • 01/23/2023

With the knowledge management module, you can create and manage knowledge articles that your users may be looking for. This will help reduce the call handling times for agents as they can look up information in a knowledge base to resolve customer queries right away, thereby increasing their productivity.

Default process

The following image describes the default process to create and use knowledge articles in your Customer Service app. Create an article and mark it for review. The reviewer can approve or reject the article. If the article is rejected, it's sent back for edits or updates. If the article is approved, it's published on the portal. It's also available in search and can be translated.



Next steps

For information on creating and managing a knowledge article, go to Create and manage knowledge articles.

For information on reviewing a knowledge article, go to Review knowledge articles.

For information on publishing a knowledge article, go to Publish knowledge articles.

Create and manage knowledge articles

Article • 12/14/2022

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

Turn your customer questions, issues, and feedback into knowledge articles, so that agents can benefit from them. Add images and videos to your articles to explain things better and make the articles engaging. You can author, edit, search, publish, and translate the knowledge articles in the Customer Service Hub.

Knowledge articles can address any number of issues your customers encounter while using your organization's product or services. Types of knowledge articles can include solutions to common issues, product or feature documentation, answers to frequently asked questions (FAQ), product briefs, and more.

> **Important**
>
> Knowledge management is available out of the box through the Customer Service Hub app module, and it works with other customer service apps as well. Articles that are created in the Customer Service Hub will be available in the Dynamics 365 Customer Service app as read-only records.

> **Note**
>
> The entities `KBArticle`, `KBArticleTemplate` and `KBArticleComment` are now deprecated. This means we don't expect you to use these entities anymore. You must use the newer `KnowledgeArticle` entity for knowledge management in Dynamics 365 Customer Service. More information: **Work with knowledge articles**

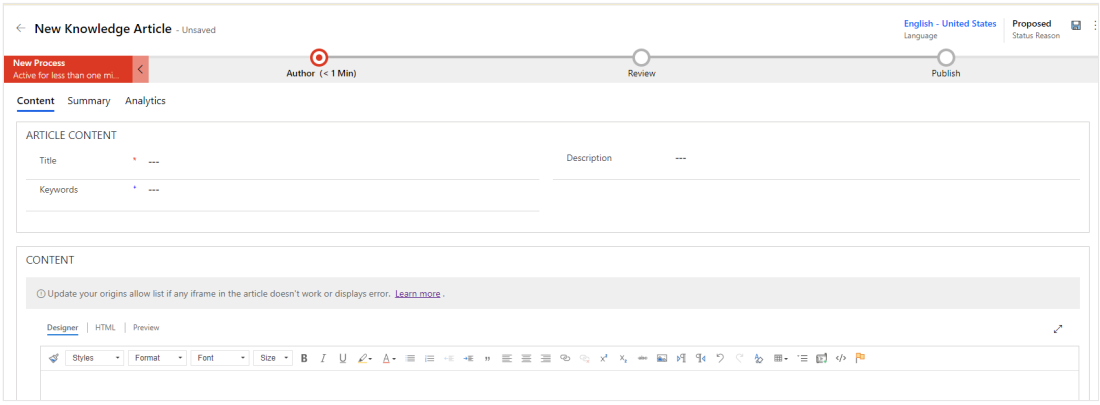
Ensure that you have Create and Read permissions on the Knowledge Article entity. By default, these permissions are added to the roles of knowledge manager, customer service manager, or customer service representative. Perform the following steps:

1. In the Customer Service Hub sitemap, go to **Service** > **Knowledge Articles**.
2. On the command bar, select **New**.

You'll be on the **Content** tab of the knowledge article.

3. In the **Article Content** section, fill in the following details:

    - **Title**: Type a descriptive title that communicates the subject and purpose of the article in a concise manner.
    - **Keywords**: Type or select keywords for the article. These keywords are used to search the knowledge base for articles. Separate keywords with commas.
    - **Description**: Type or select a short description of the article. This appears in the search results and is used for search engine optimization.



4. In the **Content** section, add the content for your knowledge article.

> **Note**
>
> As soon as you select inside the editor space, the rich text editor command bar appears. Use the rich text editor command bar options to format and style your content. If you can't use the features, your editing space is too small. If this is the case, you'll need to resize to a larger space. More information: **Use the rich text editor to create knowledge articles and emails**

5. Select **Save**.

    As the article is saved, the Business Process flow bar appears for the article. The stages are **New Process**, **Author**, **Review**, and **Publish**. The Business Process flow bar guides you to drive the article toward completeness. You can customize the stages in the Business Process flow to suit your requirements.

6. On the Business Process flow bar, select **Author**.

7. In the **Set Keywords** text box, add keywords for your article.

8. In the **Article Subject** dropdown list, choose the subject of the article to help with article searches.

9. In the **Assign Primary Author** dropdown list, choose a person who is responsible for maintaining the article content. By default, the user who creates the article is the primary author.

   Once a new article is created, the author value will be replicated to Primary author if it is a system user but not a team. The knowledge article author must be a single user (not a team) in order for it to be searchable and to load properly.

   You can mark the article complete by selecting the checkbox at this stage.

> **Tip**
>
> Select the icon to pin the stage flyout vertically.

Posts about knowledge article-related activities will begin appearing in the **Timeline** section.

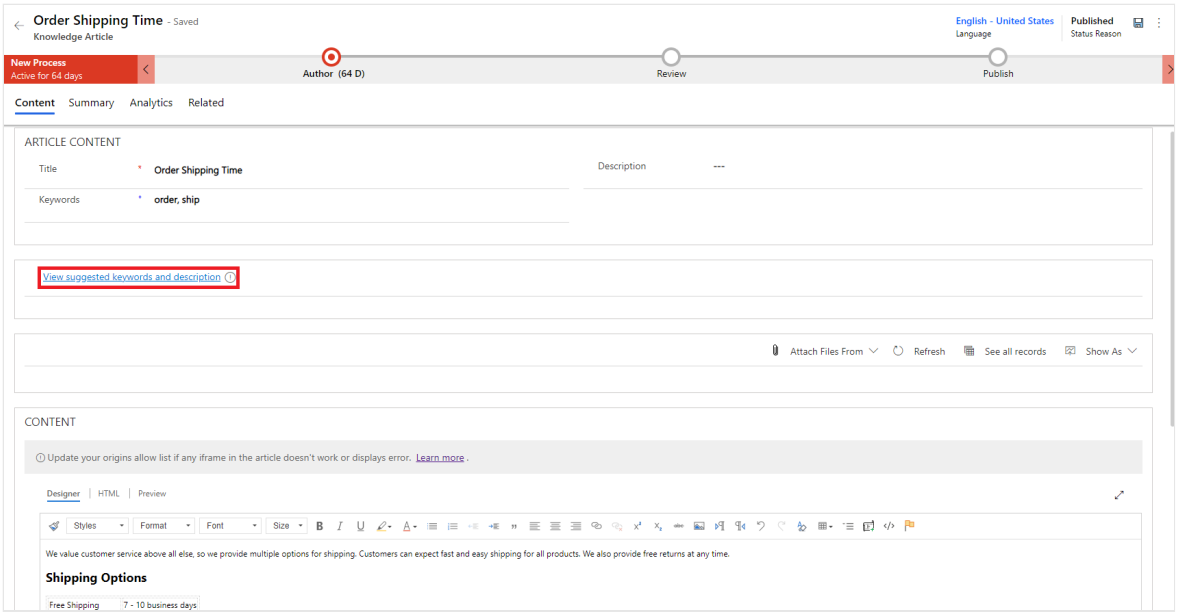
Use AI-suggested article keywords and descriptions

If your administrator has enabled keywords and description suggestions, you can select and enter your preferred keywords and descriptions when authoring or updating knowledge articles. More information: Configure AI suggestions for article keywords and description

However, either the **Title** or **Content** fields—or any other corresponding mapped fields set by the administrator—must contain some value for suggestions to be generated. If any of the fields that the model uses to generate suggestions are empty, you'll see messages such as "There was a problem finding suggested keywords" or "There was a problem finding a suggested description".

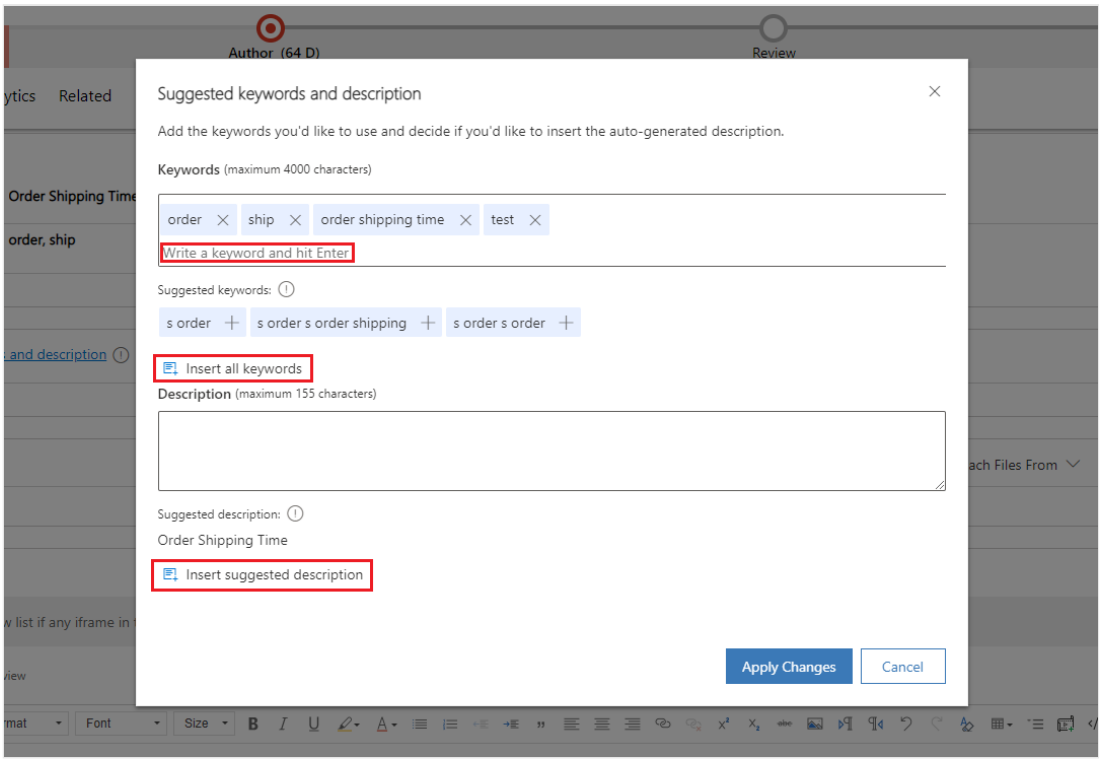
1. In the article **Content** section, add the content for your knowledge article and then select **Save**. The **View suggested keywords and description** link appears.

2. Select the **View suggested keywords and description** link.



3. In the **Suggested keywords and description** dialog, do the following:

   - Select the keywords that you want to add to your keywords list or select the **Insert all keywords** link to insert all the suggested keywords to the Keywords field. You can enter a keyword in the Keywords field to add to existing list.
   - Select **Insert suggested description** to add the description to the **Description** field.



4. Select **Apply Changes**.

The selected keywords and description appear in the **Keywords** and **Description** fields of the knowledge article form.

Create knowledge articles using templates

Authors can use the templates to create knowledge articles quickly because the fields for the knowledge article are prepopulated according to the selected template. To create knowledge articles using templates:

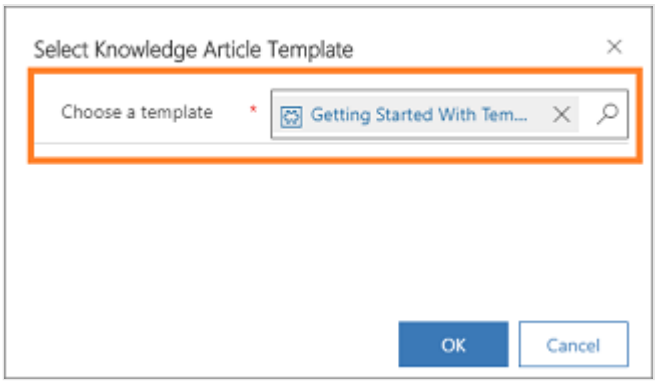
Ensure that you have Create and Read permissions on the Knowledge Article entity. By default, these permissions are added to the roles of knowledge manager, customer service manager, or customer service representative.

1. In the Customer Service Hub sitemap, go to **Service** > **Knowledge Articles**.

   A list of available articles is displayed.

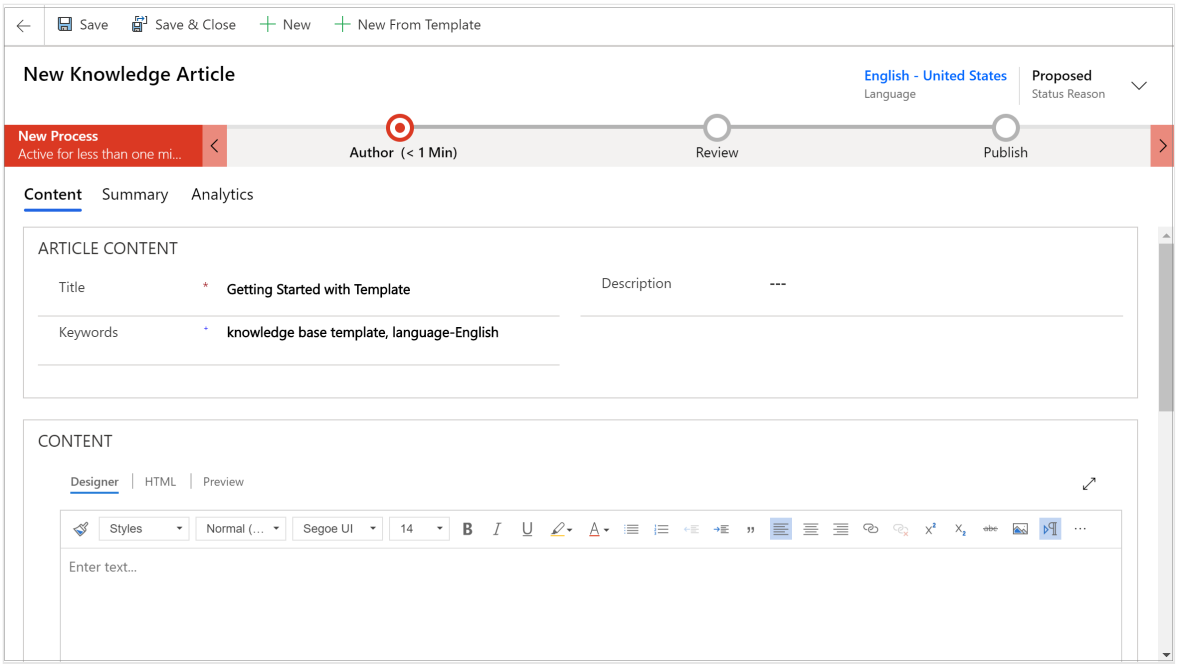
2. To create an article from a template, select **+ New From Template**.

3. In the **Select Knowledge Article Template** dialog, select the template to use as a base on which you author the article and select **OK**. In this example, we are selecting the template as **Getting Started With Template**.

   You observe that some fields are prepopulated as defined in the template.

4. In the **New Knowledge Article** page, edit the fields as required.



5. Select **Save**.

   The article is saved, and you can take it to the next stage to approve and publish the article to make it available for users.

> **Note**
>
> To learn how to create knowledge article templates, see **Create a knowledge article template**.

Use the rich text editor to create knowledge articles and emails

Create rich and well-formatted content for emails or knowledge articles using the new rich text editor in the Customer Service Hub. The editor brings common word processor features like advanced styling, linking, find and replace, and insert images and tables.

The **Content** editor panel consists of three tabs:

- **Designer**: Author and edit the article here. Benefit from the enhanced and rich text editing capabilities.
- **HTML**: View the HTML preview of the content here. You can author or edit the article in the HTML tab also.
- **Preview**: See how your content would look on devices like desktop, tablet, or mobile.

Additionally, you can perform **Undo**, **Redo**, and **Full Screen** in the Content editor panel.

Designer

You can choose a specific format or style for the content you're writing. The following table outlines the different formatting options of the rich text editor.

> **Note**
>
> You can access your browser's context menu by pressing **Ctrl+right-click**. This is useful if you need to use your browser's built-in spell checker. Otherwise, you can use the right-click to provide contextual formatting for any element you might be using.

Icon	Name	Shortcut key	Description
	Format Painter	Ctrl+Shift+C, Ctrl+Shift+V	Apply the look of a particular section to another section. **Note**: Copy formatting only works with inline styles, and won't copy or apply block-level styles.
	Formatting Styles		Apply predefined sets of formatting features to make it easier to keep the presentation of the text consistent. To make the choice easier, the style names are displayed in a style that they represent, giving you a preview of what the text will look like. **Note**: This option is available in the expanded mode only.
	Paragraph Format		Apply predefined block-level combinations of formatting options. A paragraph format can only be applied to a block-level element, like a `paragraph` or a `div` element. **Note**: This option is available in the expanded mode only.
	Font	Ctrl+Shift+F	Select your desired font. The default font is Segoe UI. **Note**: When you select any formatted content, the font name for that content displays. If your selection contains multiple fonts, the topmost font name of your selection is displayed.
	Font size	Ctrl+Shift+P	Change the size of your text. The default size is 12. **Note**: When you select any formatted content, the font size for that content displays. If your selection contains multiple font sizes, the topmost font size of your selection is displayed.

Icon	Name	Shortcut key	Description
	Bold	Ctrl+B	Make your text bold.
	Italic	Ctrl+I	Italicize your text.
	Underline	Ctrl+U	Underline your text.
	Text Highlight Color		Make your text stand out by highlighting it in a bright color.
	Font Color		Change the color of your text.
	Bullets		Create a bulleted list.
	Numbering		Create a numbered list.
	Decrease Indent		Move your paragraph closer to the margin.
	Increase Indent		Move your paragraph farther from the margin.
	Block Quote		Apply a block-level quotation format in your content.
	Align Left	Ctrl+L	Align your content with the left margin. (Commonly used for body text to make it easier to read.)
	Align Center	Ctrl+E	Center your content on the page. (Commonly used for a formal appearance.)
	Align Right	Ctrl+R	Center your content on the page. (Commonly used for a formal appearance.)

Icon	Name	Shortcut key	Description
	Link		Create a link in your document for quick access to webpages and files. URL text that you paste or enter is converted into a link. For example, **http://myexample.com** will become http://myexample.com . In the **Link** dialog, choose the type of link you'd like to insert. Use the **Link Info** tab to choose the link type and set the link protocol and URL. The type of links that you can add are defined by your administrator. If you add links whose origin link doesn't match any of the links specified in the origins list, an error will be displayed when users open an article. The error message "Update your origins allow list if any iframe in the article doesn't work or displays error" will appear. More information: Configure origins allow list for knowledge articles The **Target** tab is only available for the URL link type. It specifies the location where the link will open after you select it.
	Unlink		Delete a link in your email or document. When you place the cursor on a link, the **Unlink** button on the toolbar becomes active. Select the button to remove the link and make it plain text.
	Superscript		Type very small letters just above the line of text.
	Subscript		Type very small letters just below the line of text.
	Strikethrough		Cross out text by drawing a line through it.
	Image		Insert an image. You can insert an image by directly copying and pasting it inline in the editor, dragging and dropping it from your desktop or local folder directly into the editor, or by typing a URL. The following formats are supported: PNG, JPG, or GIF. For details on using inline images, see Use inline images.

Icon	Name	Shortcut key	Description
	Left to Right		Change the text to left-to-right for content such as a paragraph, header, table, or list. Commonly used for bi-directional language content. This is the default setting.
	Right to Left		Change the text to right-to-left for content such as a paragraph, header, table, or list. Commonly used for bi-directional language content. The default setting is left-to-right.
	Undo Typing		Undo changes you made to the content.
	Redo Typing		Redo changes you made to the content.
	Clear All Formatting		Remove all formatting from a selection of text, leaving only the normal, unformatted text.
	Add a Table		Add a table to your content. After adding a table, you can do any of the following: • Resize table columns by clicking and dragging your mouse to resize the columns to the desired width. • Select one or several cells within a table and apply specific formatting, add links to the selection, or cut, copy, or paste entire rows or columns. • Right-click to access the properties. This supports features such as cell type, width and height, word wrapping, alignment, merging and splitting cells horizontally and vertically, inserting or deleting rows and columns, row and column span, and cell and border color.

Icon	Name	Shortcut key	Description
	Create Collapsible Section		Create a section that can be collapsed or expanded. This is useful in articles with a lot of information. Collapsed sections help agents find relative information more quickly by scanning the titles within an article. Collapsible sections include title and body fields to type text into, and you can nest collapsible sections to make it easier to scan longer articles to find the most relevant sections quickly. You can also select text you have already typed and then click the collapse icon to turn it into a collapsible section. If you create a collapsible section and then later want to delete it, place your cursor within the section, and then click **Delete** on your keyboard, or right-click within the collapsible section and select **Cut**.
	Embed Media		To embed videos into your content: 1. Place the cursor where you want to insert the video, and then on the toolbar, select the **Embed Media** button. The **Embed Video** dialog opens. 2. Enter the embed link of the video provided by the video hosting provider, and then select **OK**.
	Create Div Container		Create a `div` container to apply formatting to a larger document fragment that extends beyond one block. The **General** tab lets you manually add a stylesheet class that is applied to the div element. The **Advanced** tab lets you configure additional div element options such as assigning it an ID, a language code, a text direction, an advisory title, or CSS style properties. **Note**: This option is available in the expanded mode only.

Icon	Name	Shortcut key	Description
	Create Anchor		You can add anchors in document text and then link to them for easier navigation. **Note**: The anchor feature only works when an article is open. It doesn't work if you are viewing an article from the **Preview** tab. To add an anchor: 1. Place the cursor where you want to insert an anchor, and then on the toolbar, select the **Anchor** button. The **Anchor Properties** dialog opens. 2. Enter a name for the anchor, and then select **OK**. The **Anchor** button appears in the area where you created the anchor. You can now use the **Link** button to link to your anchor.

> **ⓘ Important**
>
> You can't use client-side code (script tags or JavaScript) in articles or emails. If you want to associate CSS or JavaScript, use web resources.

> **ⓘ Note**
>
> In mobile devices, where you have comparatively smaller screen sizes, a limited set of formatting options will be displayed.

Use inline images

You can insert an image by directly copying and pasting it inline in the editor, dragging and dropping it from your desktop or local folder directly into the editor, or by typing a URL.

Before using inline images, keep in mind the following:

- These are the supported formats: PNG, JPG, or GIF
- These are the supported browsers: Microsoft Edge, Chrome, Firefox, Safari

Drag and drop an image

> ⓘ **Note**
>
> You can only drag and drop an image in an editable area of the editor.

1. Drag and drop the image either above the content or in the middle of the content in the editor.
2. Drag any corner of the image to resize it to your desired size in the editor.

Copy and paste an image

> ⓘ **Note**
>
> To copy and paste images, you must open the image file and then copy and paste it into the editor.
> You can drag and drop or copy and paste an image from Microsoft Word into the editor. One or two images can be copied at a time, as long as the total size of the images together doesn't exceed 5 MB.

1. Open the image file that you want to copy to the editor.
2. Right-click the image, then select **Copy**.
3. Go to the desired location in the editor where you want to insert the image, and then either right-click and select **Paste**, or select **Ctrl+V**.

Insert a URL for an image

To insert an image by using a URL or navigating to the local image:

1. In the editor, choose **Insert Image**.
2. In the **Image** property dialog, choose from the following options:

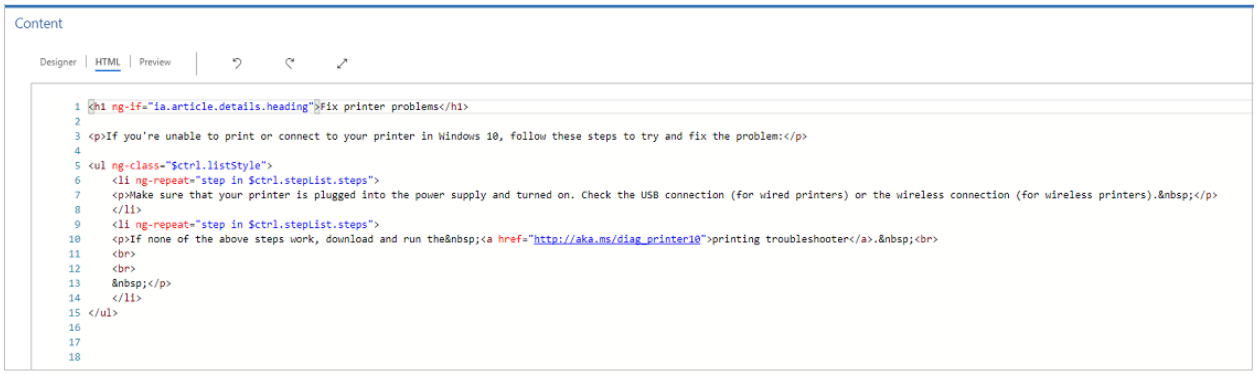
    - Specify the web address of the image, and also specify properties to define how the image will appear in the email or article.

      Note: If the image is located on the external server, use the full absolute path. If the image is located on a local server, you can use a relative path. If you want the image to be a selectable link, add a URL for the image. You can also specify if you want the targeted page to open in a new window, top-most window, same window, or parent window.

    - Select **Browse** to navigate to the image on your computer.

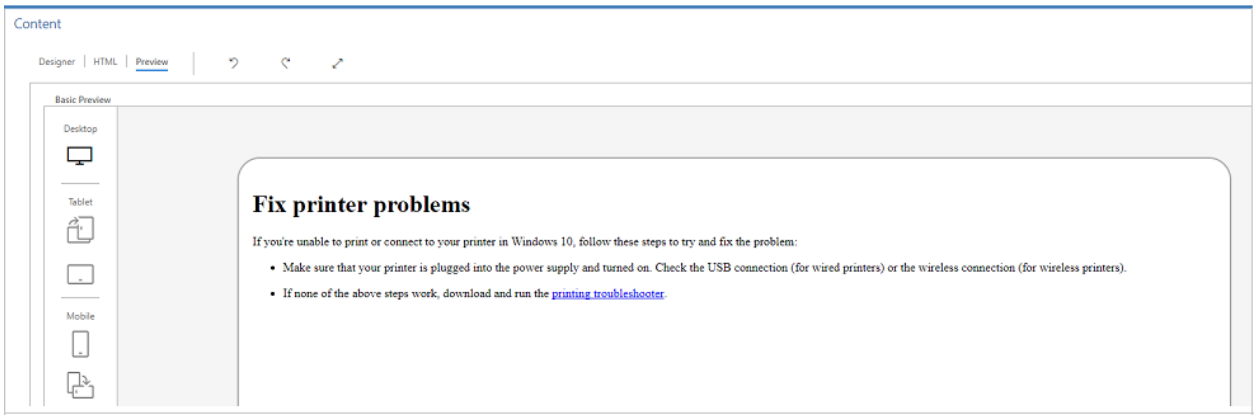
HTML

You can author and edit the article in the HTML tab of the Content editor panel, using HTML tags.



Preview

You can preview the content to view its compatibility on multiple devices, like tablets or phones.



This is an indicative preview. Content rendered can be different in the actual device or screen.

> **Note**
>
> If you add anchor links to a knowledge article in the **Content** field, you can't test them because they don't work in the **Designer** or **Preview** mode. The anchor links work only when you open the article in knowledge search and on portals.

Add a file attachment to a knowledge article

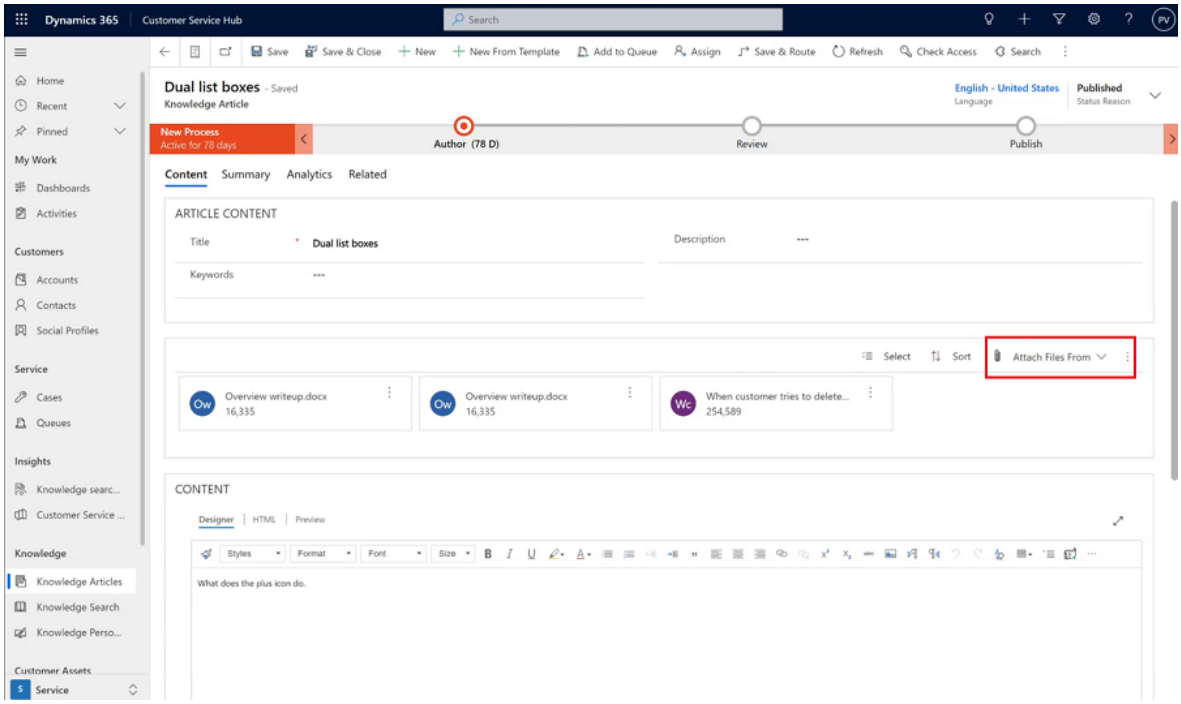
When you're creating a knowledge article, you can attach one or more files to it to help provide comprehensive information for your customers. Keep in mind the following

when attaching files:

- There is no limit to the number of articles that can be attached to a knowledge article, but the file size mustn't exceed 32 MB.
- Your administrator may limit the file size for knowledge articles.
- You must save your knowledge article before attaching files to it.

To attach a file to a knowledge article:

1. Open the knowledge article where you want to add a file attachment, and then on the **Content** tab, on the right side of the screen, select **Attach Files From**.



2. Choose from the following file locations:

    - **My Device** lets you browse and select files from your local device.
    - **Previous Uploads** opens a search pane where you can search and select from files that were previously uploaded to Customer Service Hub.

Work with file attachments

The **Attached files** section displays all your knowledge article attachments in a tile view horizontally above your message. The default setting for the maximum number of files that can be displayed is five attachments before the page forward functionality is displayed.

For your attached files, use these commands to do the following:

- **Select**: Allows you to select one or more attachments by clicking the box that appears on the attachments, and then you can either **Remove** or **Download** the

selected files.

- **Sort**: Allows you to sort records by a specific filter, such as file name or size.

> **Note**
>
> Uploads and downloads of knowledge article attachments are supported for files up to 4MB only, for:
>
> - Dynamics 365 Customer Engagement (on-premise)
> - Customer Managed Key-enabled organizations

When you publish your knowledge article, if you've attached files to it, the attachments can be accessed by knowledge consumers through Knowledge Search.

User permissions to view and download file attachments

For users to be able to view and download file attachments, you'll need to grant the following permissions to the Knowledge Article table:

Task	Access needed
Download and search attachments	Read
Add attachments	Create, append, append-to
Remove and add existing attachments	Append or append-to

Sync knowledge article attachments to the portal

To sync knowledge article attachments to the portal, your administrator must first enable the option. More information: Update knowledge article attachments for portal

On syncing knowledge article attachments to the portal:

- Dataverse search will be able to search through knowledge article attachments. More information: Microsoft Dataverse search can search through file data type Additionally, you must configure the faceted search results web template from your portal to be able to search through knowledge article attachments. More information: Configure faceted search results web template from your portal
- There will be a one-time migration from the notes attachments that have the prefix of your original KnowledgeManagement/Notesfilter setting to new attachments in

knowledge articles. Only the notes attachments used in the portal will be migrated to new attachments.

For more information, see Display file attachments with knowledge articles.

Mark a knowledge article for review

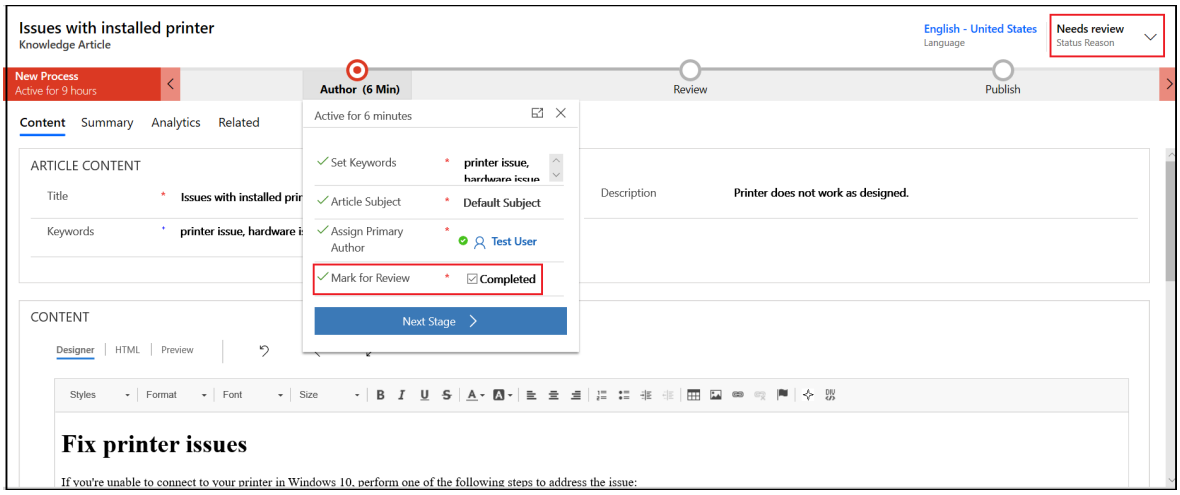
To ensure that the content you've created is accurate, have someone review it.

You can mark an article for review or directly assign it to a specific person or queue. When you mark an article for review, it starts appearing in the knowledge manager's dashboard. The knowledge manager can then assign the article to specific team members or a queue for review.

1. In the article you want to mark for review, in the **Status Reason** dropdown list, select **Needs Review**.

2. On the Business process flow, select **Author**.

3. In the **Mark for Review** field, select **Mark Complete**.



4. To assign the knowledge article to another reviewer or team, on the command bar, select **Assign** and select the user or a team.

5. To add the article to a queue so reviewers can pick it from there, on the command bar, select **Add to Queue**, and then select the queue.

See also

Add the Knowledge Base Search control to forms
Create knowledge article template

Set up knowledge management using embedded knowledge search

Use Workflow processes to automate processes that don't require user interaction

Configure a default knowledge article authoring language for your organization

Article • 12/14/2022

There may be times when your agents prefer to author knowledge articles in a language other than the language that is set for your organization. You can set a language for your organization, but then also give agents the ability to personalize it to their own choice. Agents can also change the language for different articles. Review the hierarchy as described in the table below.

> **Note**
>
> The settings you configure for knowledge article authoring on the **Settings** page won't apply when you create a knowledge article by converting a case. In such cases, the knowledge articles will be created in English.

Admin settings for KA authoring language (Knowledge settings page)

Hierarchy	Personalization preference	Configurations allowed
Admin	Language preference at the organization level	• Set UI language • Choose a language-locale combination from the lookup
Knowledge managers	Language preference at the individual author level	• Set UI language • Choose a language-locale combination from the lookup
Agent	Language preference at the individual knowledge base level	Override administrative settings and choose a language-locale combination from the lookup

The ability to override follows the hierarchy order at the individual articles, agent or knowledge manager, and then administrator.

You can set a default knowledge article authoring language for your organization in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Authoring language** section.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
2. In the **General settings** section, select **Manage**. The **General settings** page appears.
3. On the **General settings** page, go to the **Authoring language** section.

2. Set the default knowledge article authoring language for the users.

Customer Service admin center

- Set the **Enable default authoring language** toggle to **Yes**.

3. If you want to set a default knowledge authoring language for your organization:

Customer Service admin center

- Select **Other language** and select a language from the **Language** dropdown.

5. Set the **Allow users to set default knowledge authoring language** toggle to **Yes** if you want to allow your users to set their default authoring language.

6. Select **Save**.

Personalize your language preferences for authoring knowledge articles

If your administrator has enabled language personalization, you can select your preferred language when authoring knowledge articles.

> ⓘ **Note**
>
> Language settings apply only to knowledge articles that aren't created by converting a case. Converted knowledge articles are created in the default language setting of your organization.

1. In **Customer Service Hub**, go to **Service** > **Knowledge** > **Knowledge Personalization**.
2. Select the **Authoring** tab.
3. Do one of the following:
    - Set **Use organization's language value** to **Yes**.
    - Select your preferred language from the dropdown list.

    > ⓘ **Note**
    >
    > At any point, you can only either set the org language or select a language from the list.

4. Select **Save**.

    When you create a new knowledge article, the default language you selected is used.

5. If you need to change the language for a specific article only, select the **Summary** tab, and then select your preferred language in the **Language** field.
6. Select **Save**.

Review knowledge articles

Article • 02/03/2023

Review articles for accuracy before they're published or made available to others. After reviewing, you can either reject the article and suggest review feedback, or approve the content of the article.

Prerequisites

To approve a knowledge article, you must have **Approve** permissions for the knowledge article record type. This permission is added by default to the knowledge manager, customer service manager, customer service representative, and system administrator roles or to equivalent roles.

How to review, and reject or approve a knowledge article

To	Do the following
Pick an article assigned to you	In Customer Service app: Go to **Dashboard** > **My Knowledge Dashboard**, and then see the **My Active Articles** stream. **-OR-** Go to **Queues**, and then select the **Items available to work on** view.
To suggest review feedback	1. On the Business process bar, in the **Review** stage, in the **Review** field, select **Reject**. Give the reason for rejection in the **Reject Knowledge Article** flyout. 2. To add details about the changes you want in the knowledge article, go to **Summary** tab and in the **Timeline** section, select + to add a note. The rejected article is assigned back to the primary author of the knowledge article.
Approve the content of the article	When you approve the article, it implies that the content is ready to be consumed by agents and is ready to be published as well. On the Business process bar, **Review** stage, **Review** field, select **Approve**. The article is now ready to be published.

Publish knowledge articles

Article • 01/23/2023

After the content in the article is complete and reviewed, you can publish the article to the portal to make it available to your customers. You can publish the article immediately or schedule it for a later time.

> **Important**
>
> If your organization is using a portal to publish the knowledge articles, your customizer can write a plug-in that can pick the published articles and post on your portal, and also report the article views back.

Prerequisites

Ensure that you have the Publish and Update permissions on the Knowledge Article record type. These permissions are added by default to the roles of knowledge manager, customer service manager, customer service representative, or system administrator. You will also need the Publish permission on the Knowledge Article record type, if you want to change the state of a published article.

Publish an article

1. In the Customer Service Hub, go to **Service** > **Knowledge Articles**.
2. Open a knowledge article that's in the **Approved** state.
3. To make it easy to find knowledge articles related to specific products, associate the knowledge article with a product.
   a. On the command bar, select **More** > **Relate Product**.
   b. In the **Select Product to Associate with** field, select the **Lookup** button, select a product this article is about, and then select **Associate**.

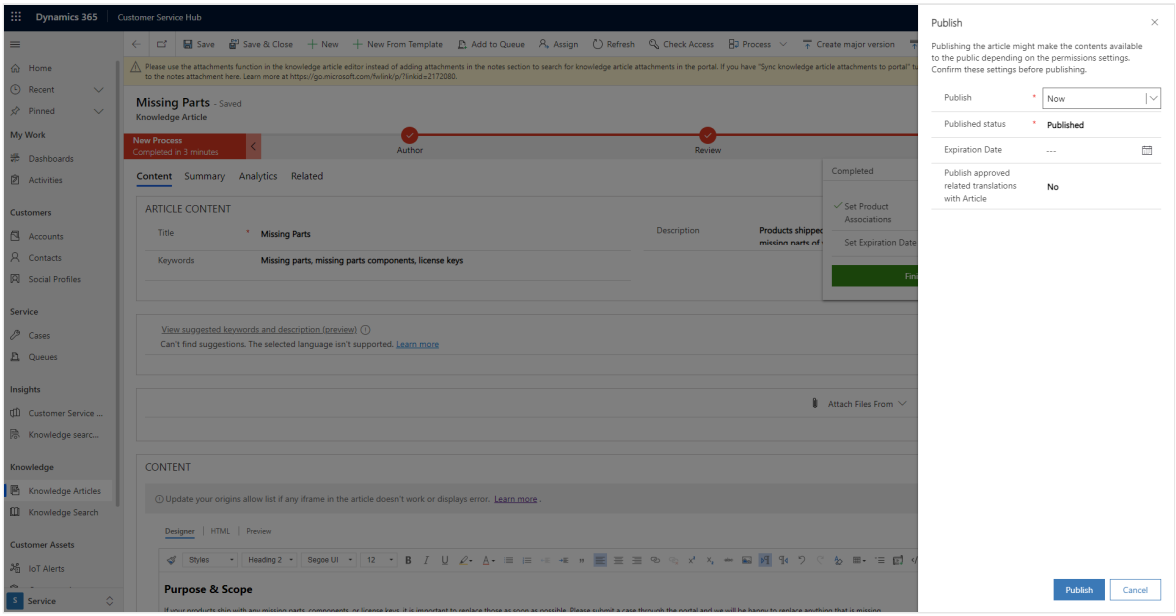
      The associated article appears in the **Related Products** list in the **Related Information** section of the **Summary** tab.
4. On the Business process bar, select the **Publish** stage.
5. In the **Set Product Associations** field, select **Mark as Complete**.

6. If you want to schedule the article to publish on a later date, on the **Summary** tab, in the **Publish On** field, select a date and time to publish the article.

7. Select **Finish**. The Publish dialog is displayed.

> **Note**
>
> The Publish dialog appears only for the default business process flows where the final stage is **Publish**. To configure the Publish dialog for other customized stages, see **Process events and event handler methods**.

- In the **Publish** field, select whether you want to publish the knowledge article now or in the future. To publish the article in the future, in the **Publish On** field, select a date and time.
- In the **Published Status** field, select what status the article should be in after it is published. By default, **Published** is selected.
- In the **Expiration Date** field, select a date and time when you want the published article to expire. Expired articles are no longer available in searches.
- If you've set an expiration date, in the **Expiration Status** field, select the status the knowledge article should be set to after it expires.
- To publish all approved related translated articles with the article, in the **Publish Approved related translations with Article** field, select **Yes**.
- Select **Publish**.



> **Note**
>
> In the knowledge article for interactive experience form, if there is an active customization layer over the **msdynce_KnowledgeManagementFeatures** layer, you won't be able to view the quick form publish dialog. You must delete the active customization layer to view the quick form publish dialog. More information: **Removed an unmanaged layer**.

Update published knowledge articles

When a knowledge article is in the Published (or Scheduled) state, only those users who have the Publish privilege can update it.

1. In the Customer Service Hub site map, go to **Service** > **Knowledge Articles**.
2. Select the published article you want to edit.
3. On the command bar, select **Update**.
4. Update the article based on the feedback.

If the article has information that complements an existing knowledge article, associate the existing article with the current knowledge article.

1. In the knowledge article, on the command bar, select **More** > **Relate Article**.
2. In the **Select Article to Associate** field, select the **Lookup** button, select an existing article, and then select **Associate**.

   The associated article appears in the **Related Articles** list in the **Related Information** section of the **Summary** tab.

Create and manage article versions

Article • 01/23/2023

Article versioning helps you manage updates to your knowledge articles without disrupting the live or published articles. By creating major and minor versions of a knowledge article, you can keep your articles up to date with the latest information while keeping track of changes throughout the lifecycle of your products and services.

This capability helps you to keep accurate records of the features your organization provides and go back to previous versions if you need to.

Create a new version

1. In the Customer Service app, select **Knowledge Articles**.
2. Select the article you want to create a new version for.
3. From the command bar, select **Create Major Version** or **Create Minor Version**.

   An example of a major version would be when your documentation changes to detail a new feature or functionality, while a minor version might be a change to the user interface with no change to functionality.

   The new version of your article will contain all of the same content, information, and permissions as the current version. The **Version Major** or **Version Minor** field will automatically update to reflect the new version number.

   > ⓘ **Note**
   >
   > You won't be able to make any changes to the **Major Version Number**, **Minor Version Number**, **Language**, or **Article Public Number** fields when creating a new major or minor version of an article.

4. After you have reviewed the article, make any changes that you want to the new version. You can update the article title, content, keywords, and description to reflect any changes to your products, features, or services.

Review and publish your new version

When you're done making changes, you can push the new version of your article through your standard article workflow. When you're finished reviewing and are ready

to publish, on the command bar, select **More** > **Publish**, and then choose how and when you want to publish your new version. You can publish your new version immediately, schedule it to publish at a future date, or leave it as a draft to manually publish later. More information: Publish knowledge articles

Manage article versions

Managing your article versions means publishing and archiving different versions of each article to provide the most accurate information to your customers and internal employees. Keep in mind that only one version of an article can be published at a time. It's important to keep track of the changes that are made to each version and publish them when it's appropriate.

1. In the knowledge article, select the **Summary** tab.
2. In the **Related Information** section, select the **Related Versions** button to display a list of all major and minor versions of the article.
3. In the **Related versions** list, open the version you want to delete.
4. Select the **More** button, and then select **Send to Trash**.
5. When prompted, select **OK**.

   Deleting an article version is permanent and can't be undone. You won't be able to go back to that version of the article, so ensure that you don't need any of the information. It's a good idea to create a local backup of any versions you delete.

Translate knowledge articles

Article • 01/23/2023

Your knowledge article must reach your customers irrespective of their market or region. The knowledge management capability in Customer Service helps you set the translation language for your articles, which enables you to provide the same self-help content in multiple languages without having to manage multiple copies of the same article.

Select a language for your knowledge article translation

1. In the Customer Service app, select **Knowledge Articles**.
2. Select the article you want to translate, and from the command bar, select **Translate**.
3. In the **Create new translation** dialog, do the following:

   - From the **Pick a language** dropdown list, search for and select the language you want.
   - In the **Create new version** field, select either the **Major** or **Minor** version for your translation.

   You can set languages that are supported by your Dynamics 365 instance.
4. Select **Create**.
5. Enter your translated text in the appropriate fields. You can enter translated text for the following fields:

   - Title
   - Keywords
   - Article Description
   - Content
6. When you are done reviewing and your article is ready for publish, select **More** > **Publish**. Select how and when you want to publish your new version. You can publish your new version immediately, schedule the publish for a future date, or leave it as a draft to publish it manually at a later point in time. More information: Publish knowledge articles

Manage article translations

After you've published a translation for an article, you can manage it and any other translations by selecting the **Summary** tab of the knowledge article.

1. In the **Related Information** section, select **Related Translations**.
2. Open the translation you want to view. Keep in mind that there may be multiple versions for each language. You can sort the translations by selecting the column headers of the **Related Translations** section.

   From here, you can:

   - Edit or update a translation.
   - Create a new major or minor version of a translation.
   - Delete a translation or version of a translation.

Manage feedback for knowledge articles

Article • 01/23/2023

Mange feedback received for your articles by adding them to your knowledge articles. Update your knowledge articles based on the feedback to make your articles useful for agents.

Add feedback to an article

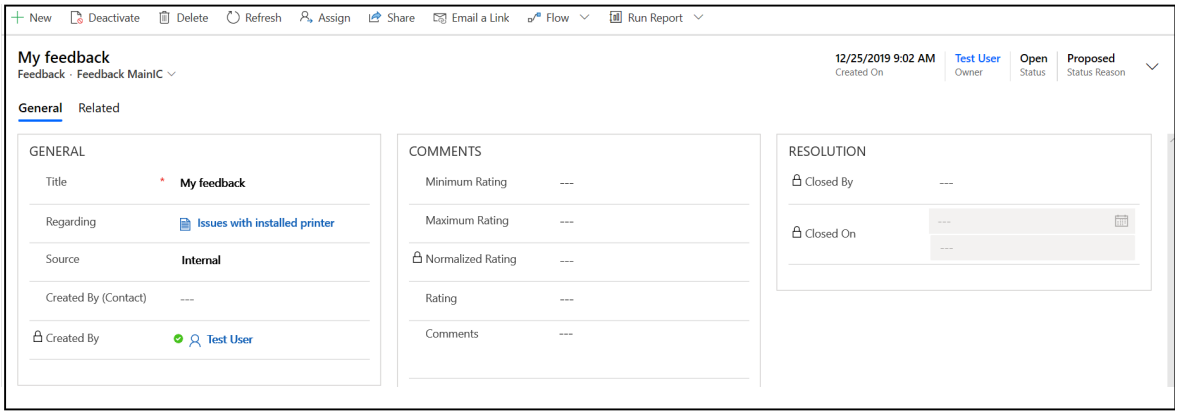
1. In the Customer Service app, select **Knowledge Articles**.
2. Select the article you want to add feedback for.
3. In the **Feedback** subgrid, select **Create Feedback**. You can also select ➕ in the navigation bar and then go to **Feedback** to create a feedback.
4. In the **Quick Create: Feedback** dialog, fill in the information:

    - **Title**. Type a descriptive title for the feedback. For example, if the feedback is about customer satisfaction, type that.
    - **Regarding**. Look for relevant records to associate the feedback.
    - **Source**. Select whether the feedback is internal or from a portal. If you received the feedback via a phone call, you can select **Internal**.
    - **Comments**. Type any feedback comments that you want.
    - **Rating**. Type a number to specify how useful the related record is. For example, if you're tracking the customer satisfaction for a case and you want to rate it a 2 on a scale of 1–10, type 2.
    - **Minimum Rating** and **Maximum Rating**. Specify a minimum and maximum rating to define a rating scale. For example, if you want to give it a rating of 2 on the scale of 1–10, type 1 as the minimum rating and 10 as the maximum.
    - **Created by (Contact)**. If you're creating the feedback on behalf of a customer contact, select the contact here.

      The **Created By** and **Closed By** fields are automatically populated with the user who creates or deactivates the feedback record.

- Dynamics 365 Customer Service automatically calculates the **Normalized Rating** based on the following formula: **(Rating - Minimum Rating)/ (Maximum Rating - Minimum Rating)**.

5. Select **Save and Close**.



> **Note**
>
> You can also update the owner of the feedback in the flyout.

Update knowledge articles based on the feedback

Ensure that your articles are up to date and accurate at all times by updating them based on feedback you receive.

1. In the Customer Service app, select **Knowledge Articles**.
2. Select the article you want to edit.

   If the reviewer has suggested any changes from their review, you can see them as notes in the **Timeline** section.

3. Update the article based on the feedback.
4. Select **Save**.
5. To assign the article back to the reviewer for approval or publishing, on the command bar, select **Assign**, and then select a user or a team.

Create templates for knowledge articles

Article • 12/14/2022

Knowledge article templates help knowledge authors simplify the process of creating knowledge articles. Templates also help knowledge managers and authors maintain consistency in branding, language, and structure.

When an author chooses a template to create an article, certain fields in the template are pre-populated with values, allowing the author to focus on the main content of the article.

> **Note**
>
> To learn how to use knowledge article templates to create knowledge articles, go to **Create knowledge articles using templates**.

Prerequisites

Before working with templates, make sure you have the required privileges to create, edit, or delete knowledge article templates. Contact your administrator if you do not have these privileges.

Create a knowledge article template

As a knowledge manager, you can create knowledge article templates by defining the necessary fields such as Language, Title, Keywords, and Subject. These fields will be pre-populated when the author creates the article using the template, reducing the efforts to fill in these fields.

You can create a knowledge article template in the Customer Service admin center or Customer Service Hub app by performing the following steps:

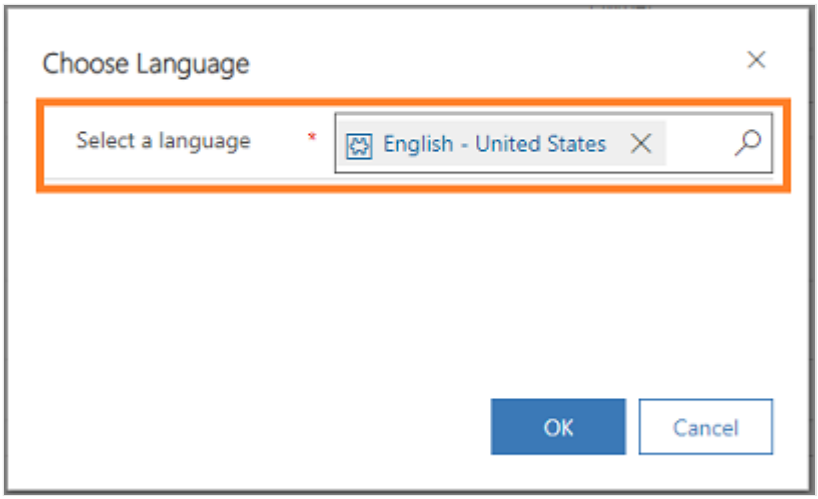
1. Go to the **Article Templates** section.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
2. On the **Knowledge** page, go to the **Article Templates** section and select **Manage**.

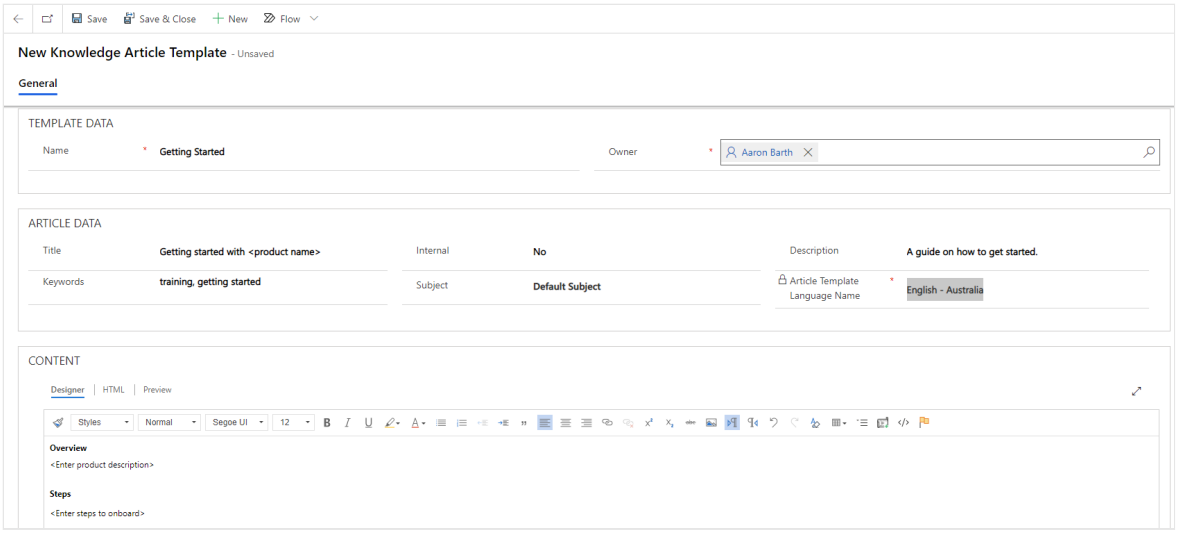
3. Select **New**.

4. In the **Choose Language** dialog box, select the language for the template, and then select **OK**. In this example, we are selecting the language as **English – United States**.



5. On the **New Knowledge Article Template** page, enter the values for the required fields that you want to pre-populate when the template is selected.

Section	Field	Description
TEMPLATE DATA	Name	Enter a name for the template.
	Owner	Enter the name of the owner who owns the template. By default, your name will be displayed in this field.
ARTICLE DATA	--	Define article fields such as Title, Keywords, and Subject that are used in any knowledge article that's created based on the template.
CONTENT	--	Define a structure that will be used in any knowledge article that's created based on this template. To learn more, see Use the rich text editor to create knowledge articles and emails.



6. After you have entered the required information, select **Save**.

   A template is created and is available for knowledge authors to use to create articles.

> **Note**
>
> Similarly, you can edit or delete knowledge article templates from the **Service Management** area.

Use a template in Portal Knowledge Article Interactive Experience forms and custom forms

To add a knowledge article template to your forms, perform the following steps:

1. In Dynamics 365, go to **Settings** > **Advanced Settings** > **Customizations**.
2. Select **Knowledge Article Entity**, and then select **Forms**.
3. Open **Portal Knowledge Article Interactive Experience form**, and then select **Form Properties**.
4. Select **Add** to add the knowledge article template library that has the following web resource:

```
msdyncrm_/KnowledgeManagementFeatureWebResource/KnowledgeArticleTemplate/KnowledgeArticleTemplateMainSystemLibrary.js
```

5. Under **Event Handlers**, make sure that the **Event** field is set to **Onload**.
6. Select **Add**. Ensure that the **Library** field is populated with the same web resource that you have added.
7. In the **Function** field, add the following function:

```
KnowledgeManagement.CommandBarActions.Instance.knowledgeArticle_onload
```

8. Ensure that the **Enabled** box is selected.
9. Select the **Pass execution context as first parameter** box, and then select **OK**.
10. Select **Save**, and then select **Publish**.

See also

Create knowledge articles using templates

Prevent duplicate workflows with knowledge article operations

Article • 01/23/2023

If you use workflow processes to perform knowledge article operations, such as creating or updating a knowledge article, the update operation is further classified into suboperations, such as:

- Update a knowledge article version.
- Manage a knowledge article version.
- Translate a knowledge article.

For the create and update operations, be aware of the following when using the workflow process:

Whenever you create a new knowledge article manually, the system creates two articles: a root article and a base article. This means if you use a workflow process that is triggered on a create operation, the workflow is triggered twice—once each for the creation of the base article and the root article.

When you use a workflow process to perform the following update operations, the workflow is triggered twice—once each for the base article and the root article:

- Create major version
- Create minor version
- Translate

> **Note**
>
> Other update operations, such as updating a field or approve or publish, do not trigger the second workflow.

To avoid triggering the workflow twice, in the workflow itself, set the trigger condition for the knowledge article as follows:

- For a create operation, set the root article to **Yes**.
- For an update operation, set the root article to **No**.

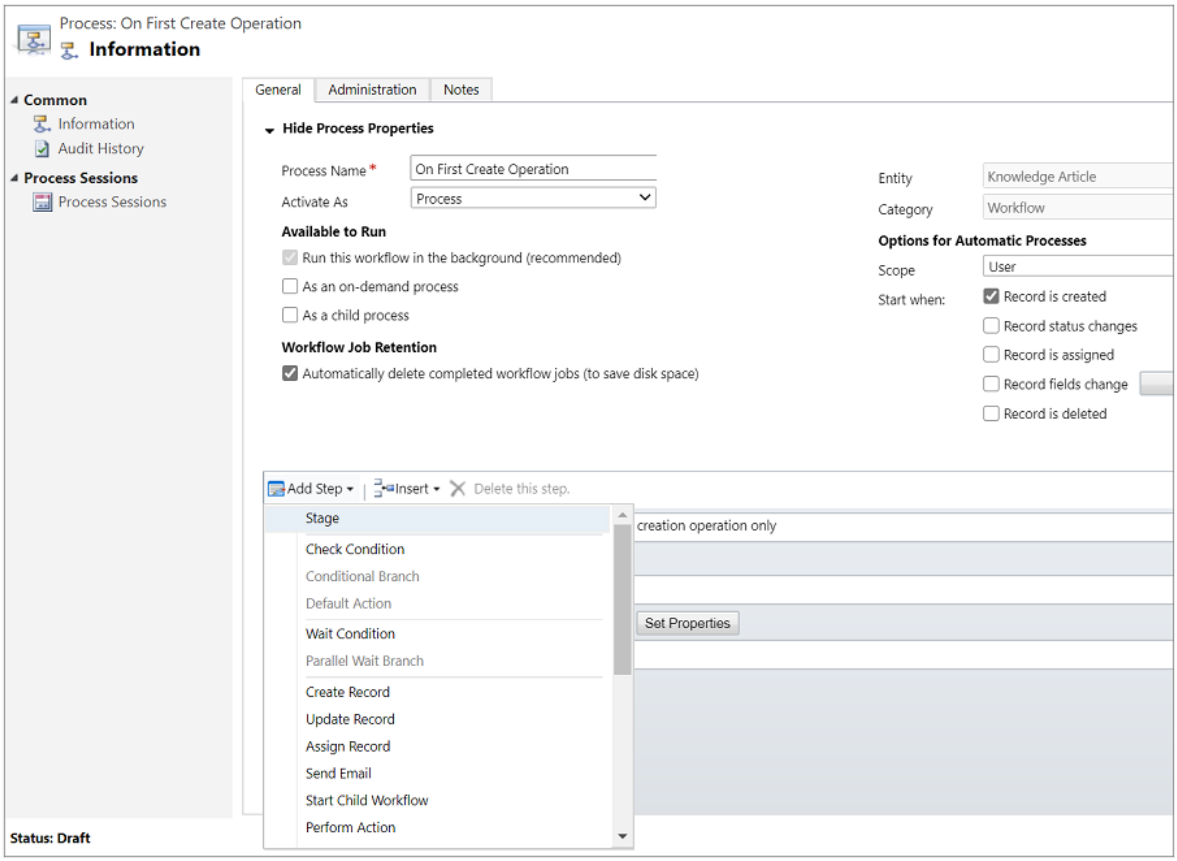
Set the trigger condition

1. In your Customer Service app, select **Settings** > **Advanced Settings**. Advanced Settings opens in a new browser tab.

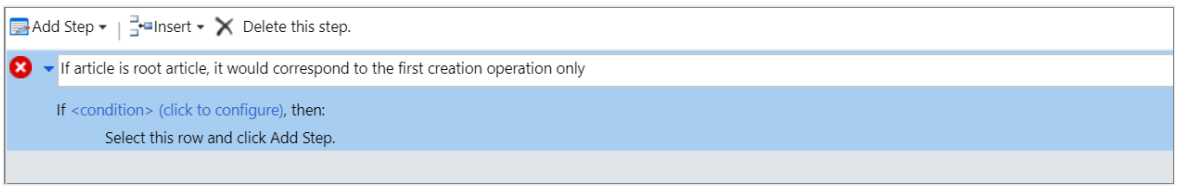
2. In the navigation bar, select **Settings** > **Processes**.

3. Select the knowledge article flow you created. The workflow process opens in a new browser window.

4. In the **General** tab, select the **Add Step** dropdown list, and then select **Check Condition**. A new step will be added.



5. In the step, select **<condition> (click to configure)**. The **Specify condition** page opens in a new browser window.



6. From the entity dropdown list, select **Knowledge Article**.

7. From the field dropdown list, select **Root Article**.

8. From the condition dropdown list, select **Equals**.

9. From the value dropdown list, select a value:

- **Yes** for the create operation.
- **No** for the update operation.

10. Select **Save and Close** to save the condition and close the window.
11. In the workflow process window, select **Save and Close** to save the condition and close the window.

Now, when you perform a create or update operation, the workflow process will trigger only once.

Knowledge article analytics

Article • 07/18/2023

Tracking knowledge article analytics helps you assess the value your articles provide to your customers. Knowing and understanding when, where, and how many times an article was viewed, tells you how much your customers rely on the information that it contains. This data is extremely useful when creating future content curation plans and can help you decide what content you will deliver in the future, as well as how you deliver it, where you deploy it, and what style or structure you use to write it.

Analytics for knowledge articles in Customer Service Hub

You can track the various details of your article in Customer Service Hub. The **Analytics** and the **Summary** tab display the statistics that help you understand how helpful your article is in resolving customer queries.

Analytics tab

To view an article's view counts and other related statistics, open the article you want to track, and then select the **Analytics** tab.

- **Views**: Shows you the total number of times the article has been viewed. The **View by day and location** section shows the article views on a particular day.

  To maintain uniformity among users who see the article views across different time zones, the views are calculated based on the Coordinated Universal Time (UTC) time zone, aggregated, and then displayed according to the user's local time zone. So, if you are in the UTC-3 time zone, you'll see the time and consequently the day as UTC-3. For example, 23rd Jun, 12:00 AM UTC time translates to 22nd Jun, 9:00 PM Brazil (UTC-3) time.

  The total number of views remains constant. You can select the **Day**, **Knowledge Article Views**, and **Location** column headers to sort the data.

- **Feedback**: Captures all the feedback and ratings on the knowledge articles and updates the articles accordingly. If your articles are published on a portal, customers and users can provide their feedback and also give ratings on an article. The Feedback sub grid shows all feedback received for the current knowledge article.

The **Rating** field calculates the average rating of the article based on the amount of feedback and number of ratings received.

> ⓘ Note
>
> Rating and view count numbers are rollup fields that are not updated instantly. For more details, see **Define rollup fields**.

- **Cases**: Shows a list of the cases that have used this article. Double-click a case to view its details.

  By reviewing cases that have used your articles, you can gain valuable insights into the questions that customers are asking, as well as what avenues they tried before asking for help. This data can help you promote your knowledge articles better and provide more useful information to your customers and team members.

Summary tab

Use the **Summary** tab to view and edit basic details of the article. In the **Summary** tab, you can:

- View or edit **Basic settings** for the article. These include details like Language, Article Public Number, and more.
- View or edit **Publish settings** for the article.
- See the **Timeline**. Add notes or view what you have missed.
- View related information about the article in the **Related Information** section. These include related versions, translations, categories, articles, and products.

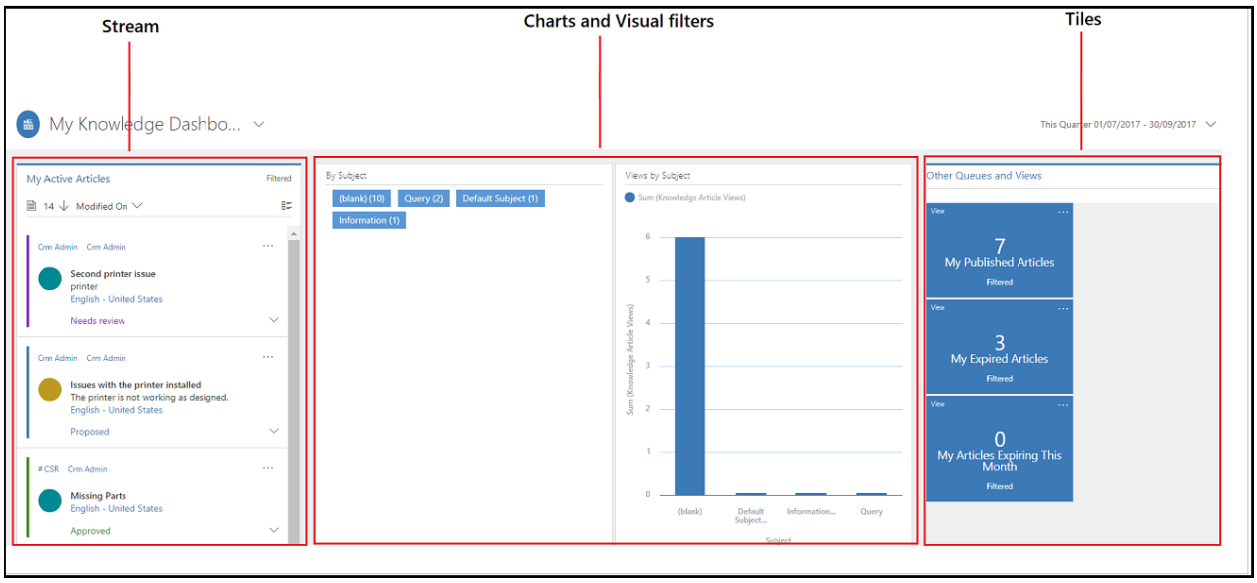
Dashboards for knowledge articles in Customer Service Hub

Knowledge managers and authors can now monitor the status of knowledge articles using the two default dashboards available in Customer Service Hub.

> ⓘ Note
>
> If these dashboards don't offer what you need, you can create new interactive dashboards. More information: **Configure interactive experience dashboards**

My Knowledge Dashboard

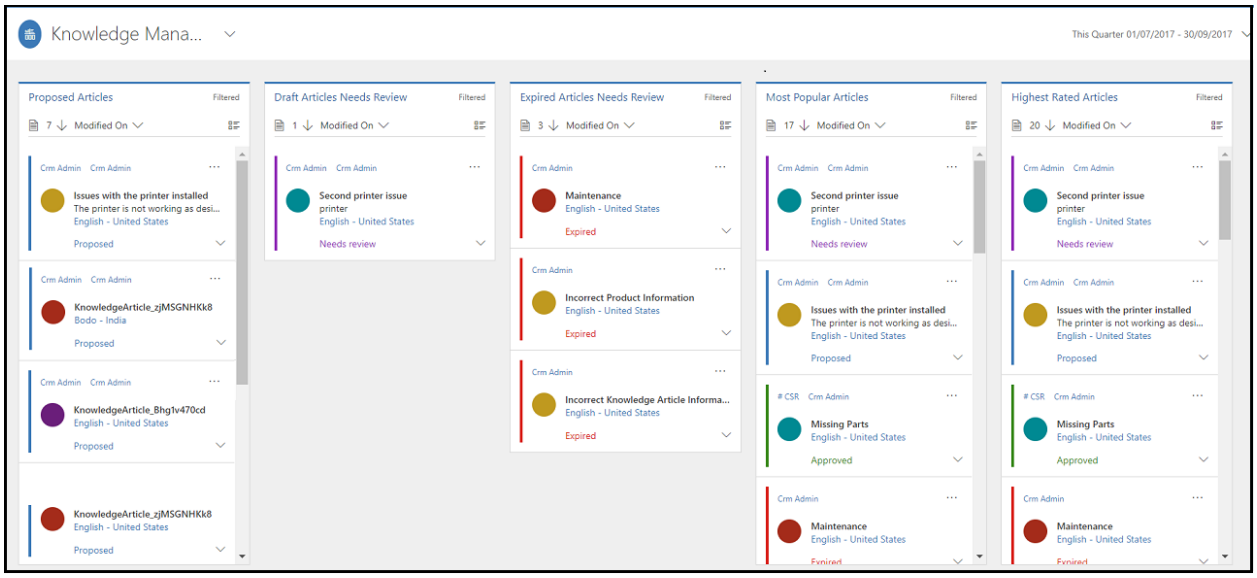
This dashboard is designed to give authors a visual snapshot of the number and status of knowledge articles they're working on. It helps them quickly know things like articles expiring in the month and articles in review.



- **Streams** show data from views or queues. In the My Knowledge Dashboard, the stream shows the active articles assigned to the author.
- **Charts** provide a count of relevant records in the streams, such as articles by status, articles by owner, or articles by subject. They also act as visual filters. You can drill down in a chart to see data that interests you the most.
- **Tiles** give authors an aggregated view of data in the streams and help them monitor the volume of their knowledge articles.

Knowledge Manager

This dashboard is designed specifically for knowledge managers. As a knowledge manager, you can quickly view the most popular articles, articles that need review, highest-rated articles, or articles that are about to expire, and take necessary actions on the articles from here.



More information: Use interactive dashboards to effectively manage service cases

Manage versions in alternate keys for knowledge article entity

If you're creating an alternate key for a Knowledge article entity, include the major or minor version in the key to maintain uniqueness. Also, if you're using translations, include the language code along with the version in the key to ensure a seamless translation experience. For more information about alternate keys, go to Define alternate keys for an entity.

Knowledge article analytics in Customer Service workspace

The **Knowledge analytics** dashboard consists of the **Article insights** and **Search term insights** dashboards and is meant for knowledge authors and supervisors. Supervisors can use these insights to improve their knowledge management base.

Next steps

For more information on knowledge management analytics in Customer Service workspace, go to Introduction to knowledge analytics.

Search knowledge articles

Article • 07/21/2023

Search and view knowledge articles to help answer a customer's question or solve an issue.

Knowledge base search is available in Customer Service Hub, Customer Service workspace, Omnichannel for Customer Service, and some versions of Dynamics 365 Customer Engagement (on-premises). Customers can search your knowledge base on their own if your organization has provided a self-service portal.

Prerequisites

- Your administrator has turned on Dataverse search.
- Your administrator has set up the following columns in the **Quick Find View** by navigating to **Tables** > **Knowledge Article** > **Views** > **Quick Find Active Knowledge Articles**:
  - Article Public Number
  - Content
    The **Content** field is hidden in the user interface to avoid unintentional deletion of content.
  - Created On
  - Keywords
  - Knowledge Article Views
  - Language
  - Major Version Number
  - Minor Version Number
  - Modified On
  - Rating
  - Status
  - Title
- You have access to knowledge article entities, such as Knowledge Article, Knowledge Article Views, Knowledge Article Attachment, Favorite Knowledge Article, and Knowledge Article Image.
- Your administrator has granted **Create**, **Read**, **Write**, **Delete**, **Append**, and **Appendto** privileges to any new custom roles you created.

- In Customer Service workspace and Omnichannel for Customer Service, your administrator has turned on the app side pane and knowledge search in agent experience profiles.
- You're dealing with a case or a conversation, or your administrator has turned on the ability to open the knowledge pane for other entities.

Tips for search results

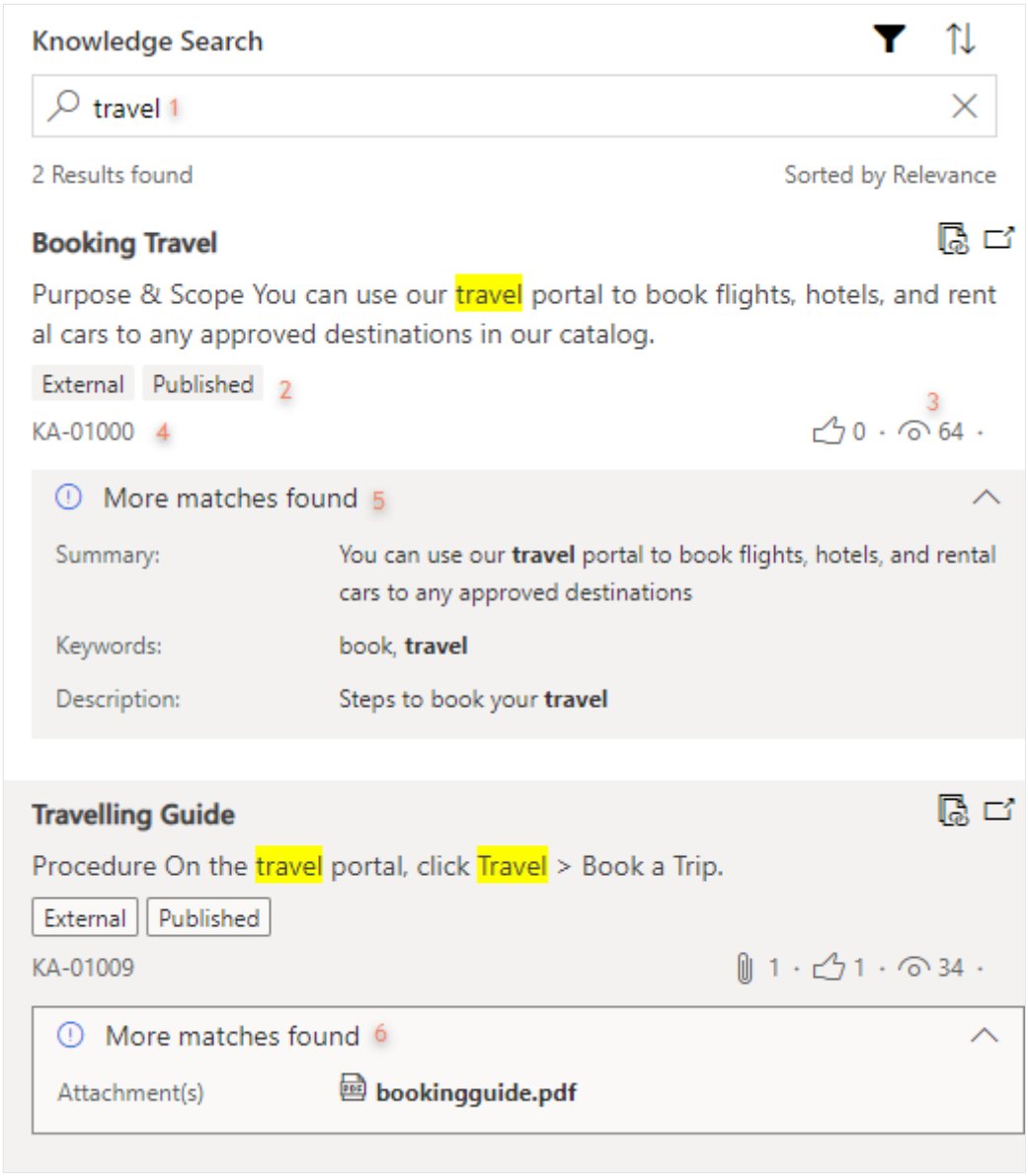
If a keyword you enter matches content in the knowledge base, the matching words are highlighted in yellow in the search results. Matches don't necessarily appear in the first three lines or words of an article, so you might not see the highlighted text in the search results.

If style tags are visible in an article's content summary, it means that style tags were used to format the article. Consider offering feedback to the article's author to use inline CSS styling instead.

Search the knowledge base directly in Customer Service Hub

You can search the knowledge base directly, without viewing a case or conversation first, in Customer Service Hub.

1. In Customer Service Hub, under **Knowledge**, select **Knowledge Search**.
2. Enter a keyword in the search box.



Legend:

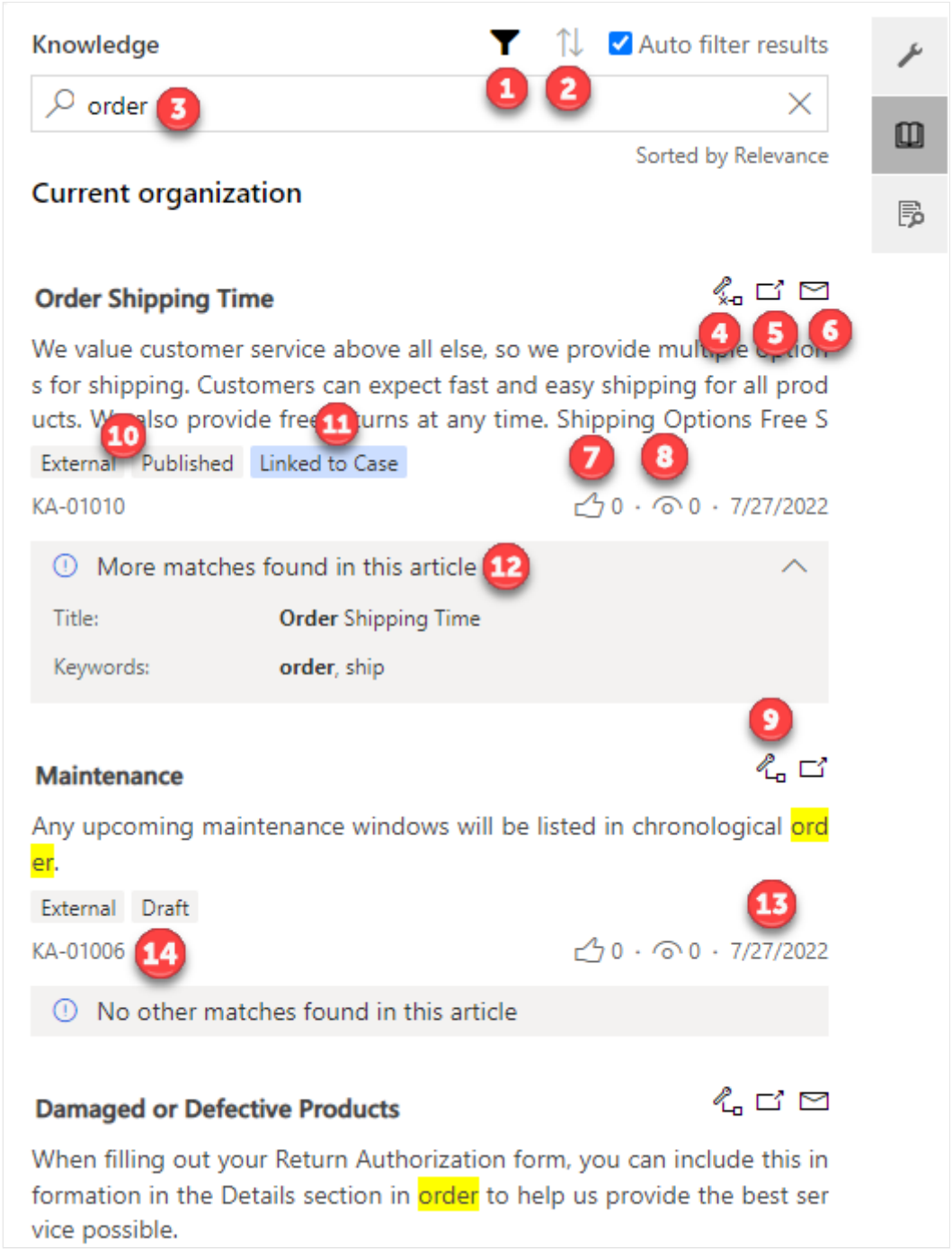
1. The search box
2. Status and visibility tags
3. The number of attachments, likes, and views, and the date the article was most recently updated
4. The article ID
5. A card that displays search term matches from keywords, description, attachments, and other custom fields
6. An attachment that includes the search term in its title or contents

If your administrator hasn't turned on Dataverse search, the system uses the keywords you enter to perform a full-text search of the following knowledge article metadata: **Title**, **Content**, **Keywords**, **Description**, and **Article Public Number**. If Dataverse search is turned on, your administrator can select the columns that are searched.

Search for related articles in Customer Service Hub

You can search the knowledge base for related articles when you view a case or conversation in Customer Service Hub.

1. In Customer Service Hub, open a case or conversation.
2. In the reference pane to the right of the timeline, select the **Knowledge search** (book) icon.
3. The case title is used as the search term by default, but you can enter your own keywords to get more relevant results.



Legend:

1. Filters the list of results
2. Sorts the list of results
3. Search box
4. Unlinks the article from the current case or conversation
5. Opens the article in a new browser window To view the article in the reference pane, select its title in the search results.
6. Opens a new email so that you can send the article to your customer
7. Rating
8. The number of times the article has been viewed
9. Links the article to the current case or conversation
10. Status and visibility tags for the article
11. Confirmation that the record is linked to a case
12. A card that displays search term matches from keywords, description, attachments, and other custom fields
13. The date the article was most recently updated
14. The article ID

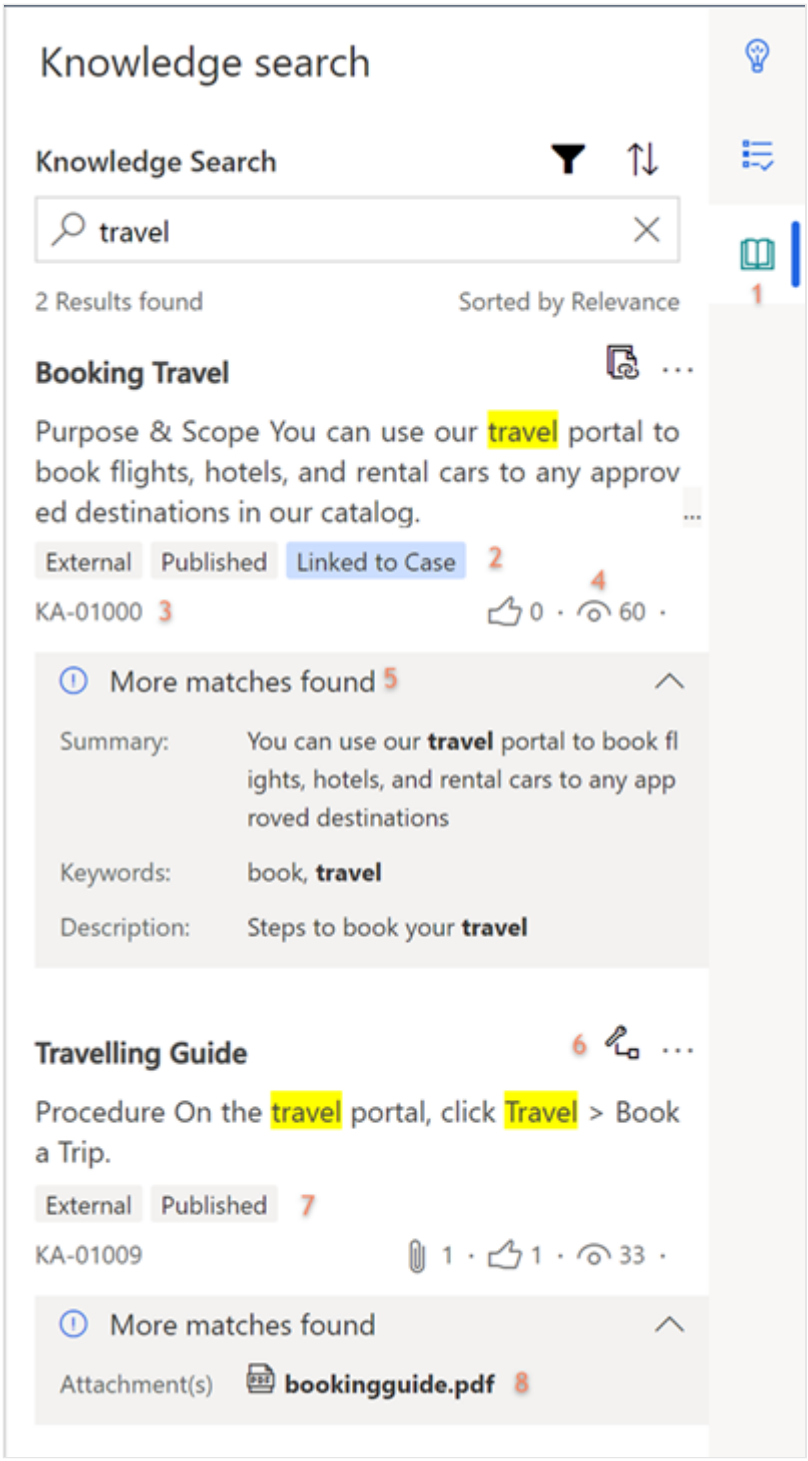
Search for related articles in Customer Service workspace and Omnichannel for Customer Service

You can search the knowledge base for related articles in the app side pane when you view a case or conversation in Customer Service workspace and Omnichannel for Customer Service. By default, a successful search displays up to 10 results.

1. In Customer Service workspace or Omnichannel for Customer Service, open a case or conversation.

2. In the app side pane, select the **Knowledge search** (book) icon.

3. The case title is used as the search term by default, but you can enter your own keywords to get more relevant results.



Legend:

1. **Knowledge Search** icon
2. The tag that indicates the article is linked to the case or conversation
3. The article ID
4. The number of times the article has been viewed
5. A card that displays search term matches from keywords, description, attachments, and other custom fields
6. Links the article to the current case or conversation, or, if the article is already linked, unlinks it
7. Status and visibility tags for the article
8. An attachment that includes the search term in its title or contents

Select **More options** (...) to:

- Select **Email Content** to open a new email so that you can send the article to your customer.
- Select **Send URL** to paste the article link in the conversation window in channels other than Voice in Omnichannel for Customer Service.

You can perform these actions only on published or expired articles.

See suggested articles during a conversation in Customer Service workspace and Omnichannel for Customer Service

In Customer Service workspace and Omnichannel for Customer Service, smart assist suggests knowledge articles in real-time based on your ongoing conversation with your customer.

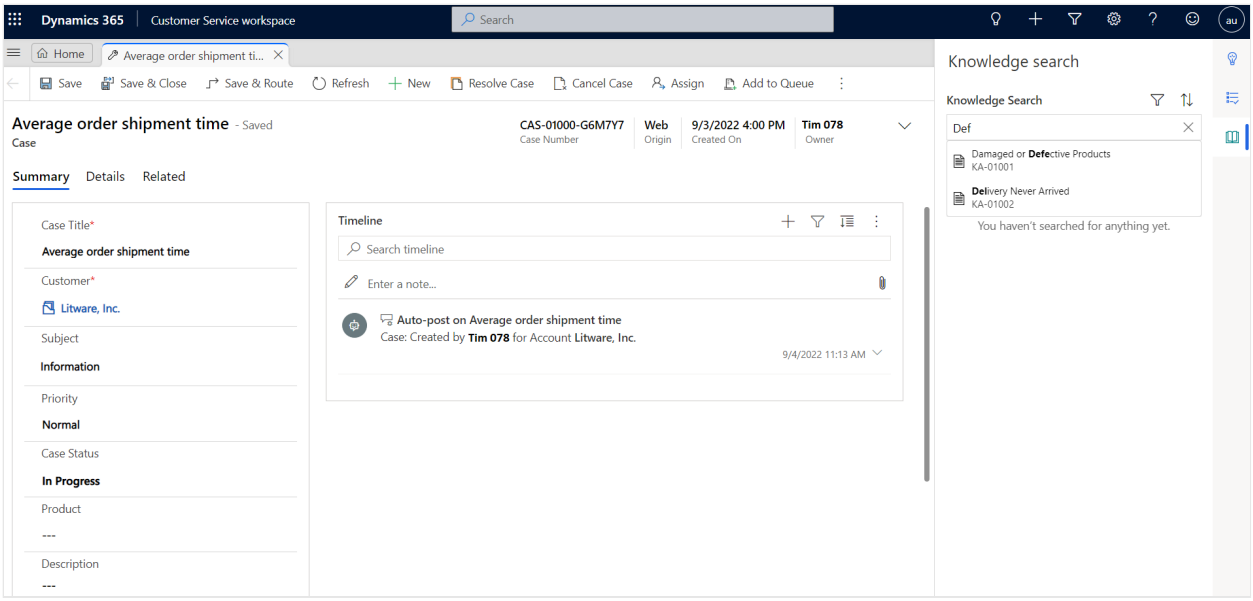
In the app side pane, select the **Smart assist** (light bulb) icon to view suggestions of knowledge articles that are related to your conversation.

Save time searching with suggest-as-you-type

If your administrator has turned on suggest-as-you-type, the system suggests related knowledge articles as you type in the search box.

Your search term is matched against article titles, and the matching results appear in a flyout menu. If your search term consists of more than one word, only titles that contain the full string, not individual words, are matched. For example, if you search for **Cheque Book Reissue**, articles with "Cheque Book Reissue" in the title are returned. Articles with the individual words "Cheque," "Book," or "Reissue" in the title aren't.

Suggest-as-you-type suggests up to six knowledge articles. Text that matches your keyword is highlighted in yellow. When you select the record, the system displays the article inline on the knowledge search control embedded on a form, on an application tab in Customer Service workspace, and as an inline view in the direct knowledge base search.



Search using favorites

If your administrator has provided privileges to custom roles, you can mark the knowledge articles you use most often as favorites to get back to them quickly while you're working on a case. You can mark up to 50 articles as favorites.

1. Select an article from the list of search results.
2. Select the **Favorite** (heart) icon to add the article to your favorites list, or, if it's already a favorite, remove it.

View your favorite articles on the **My favorites** tab. This tab is available in the app side pane, the standalone search control, the form-embedded control, and the reference pane.

The article you most recently marked as a favorite appears first in your favorites list. If an article is deleted, it no longer appears in the list.

Favorite articles are saved in the language in which you viewed them when you marked them as a favorite. The translated version of a favorite article doesn't appear as a favorite.

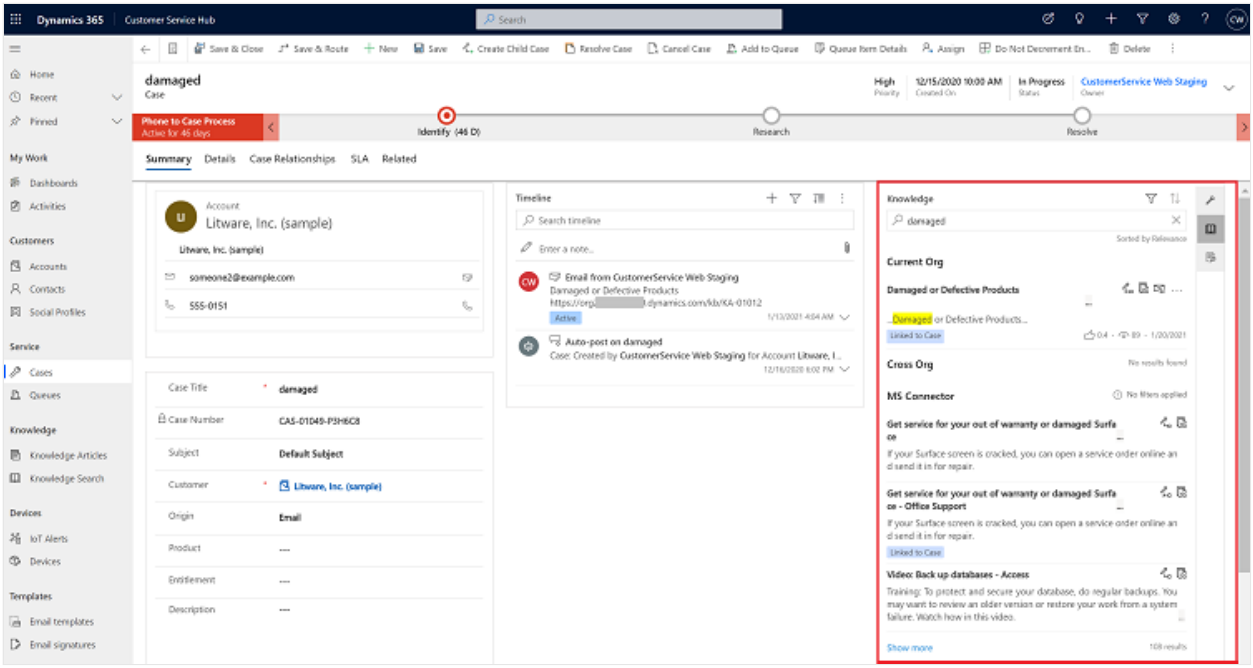
If you create a major or minor version of a favorite article, then the new version appears as a favorite and the earlier version is removed from the list.

In Customer Service workspace and Omnichannel for Customer Service, when you select a favorite article, it opens on an application tab. In Customer Service Hub, the article opens in a new browser window.

Search across external search providers

In Customer Service Hub and Customer Service workspace, you can search for files, documents, and articles from data sources outside your Dynamics 365 organization, if your administrator has configured this option. To view those results, select the source in the list under **Knowledge**.

In Customer Service Hub:



In Customer Service workspace:

For more information on setting up search providers, see Set up external search providers.

Search across integrated providers in Customer Service Hub and Customer Service workspace

In Customer Service Hub and Customer Service workspace, view and sort search results from any providers your administrator has added for you. The name of the search provider the article was pulled from appears on the knowledge article card. If it's truncated, hover over it to view the full name.

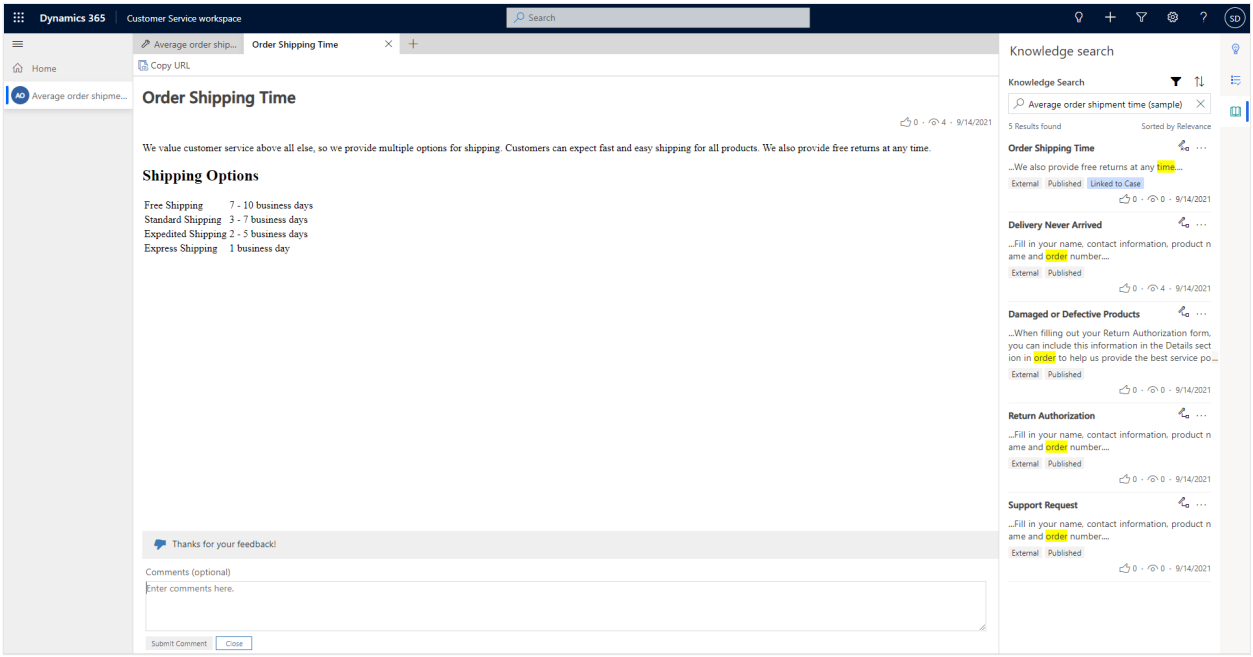
1. In the Customer Service workspace site map, select a case and then select **Knowledge search** on the app side pane.
2. Enter the search keyword. You'll see search results along with the search provider.
3. Select **Show more** to view more results.

View knowledge articles

When you select an article in the search results, where it opens depends on where you searched for it.

View the knowledge article in an application tab in Customer Service workspace and Omnichannel for Customer Service

In Customer Service workspace and Omnichannel for Customer Service, the article opens in an application tab. You can open up to 10 articles in app tabs.



You can perform the following actions on knowledge articles you view in an app tab:

- Select **Copy URL** to copy the external URL of the article to share with your customer in channels like chat or email.
- If your administrator has turned on feedback and ratings for knowledge articles, you can select the thumbs-up or thumbs-down icon to rate how helpful the article was. If you select the thumbs-down icon, a comment box appears, where you can enter the reason for your rating.

  Customer service agents and customer service managers can create or view feedback based on their role and privileges. Unless your administrator allows it, you can create, view, or edit only your own feedback. Customer service managers and knowledge managers can view your feedback.

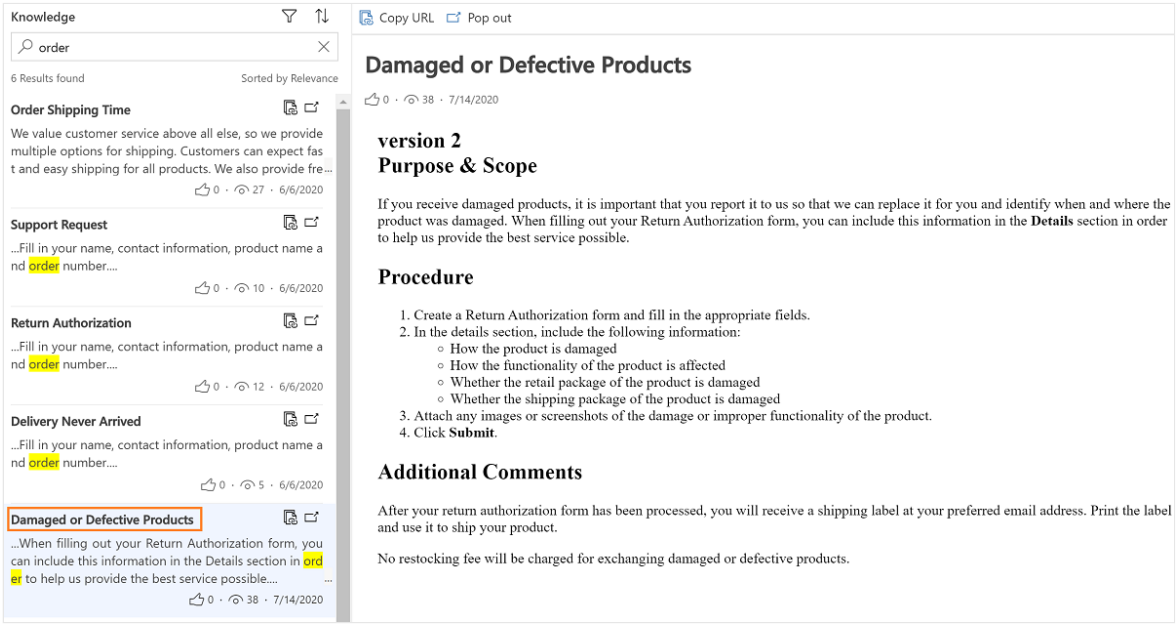
View the knowledge article in the search control in Customer Service Hub

In Customer Service Hub, select an article title. The full article opens inline, right in the search control.

If you see an error like this when you open an article: "Update your origins allow list if any iframe in the article doesn't work or displays error," ask your administrator to update your origins allow list.

You can perform the following actions on knowledge articles you view inline:

- Link it to a record, or, if it's already linked, unlink it.
- Email it to a customer.

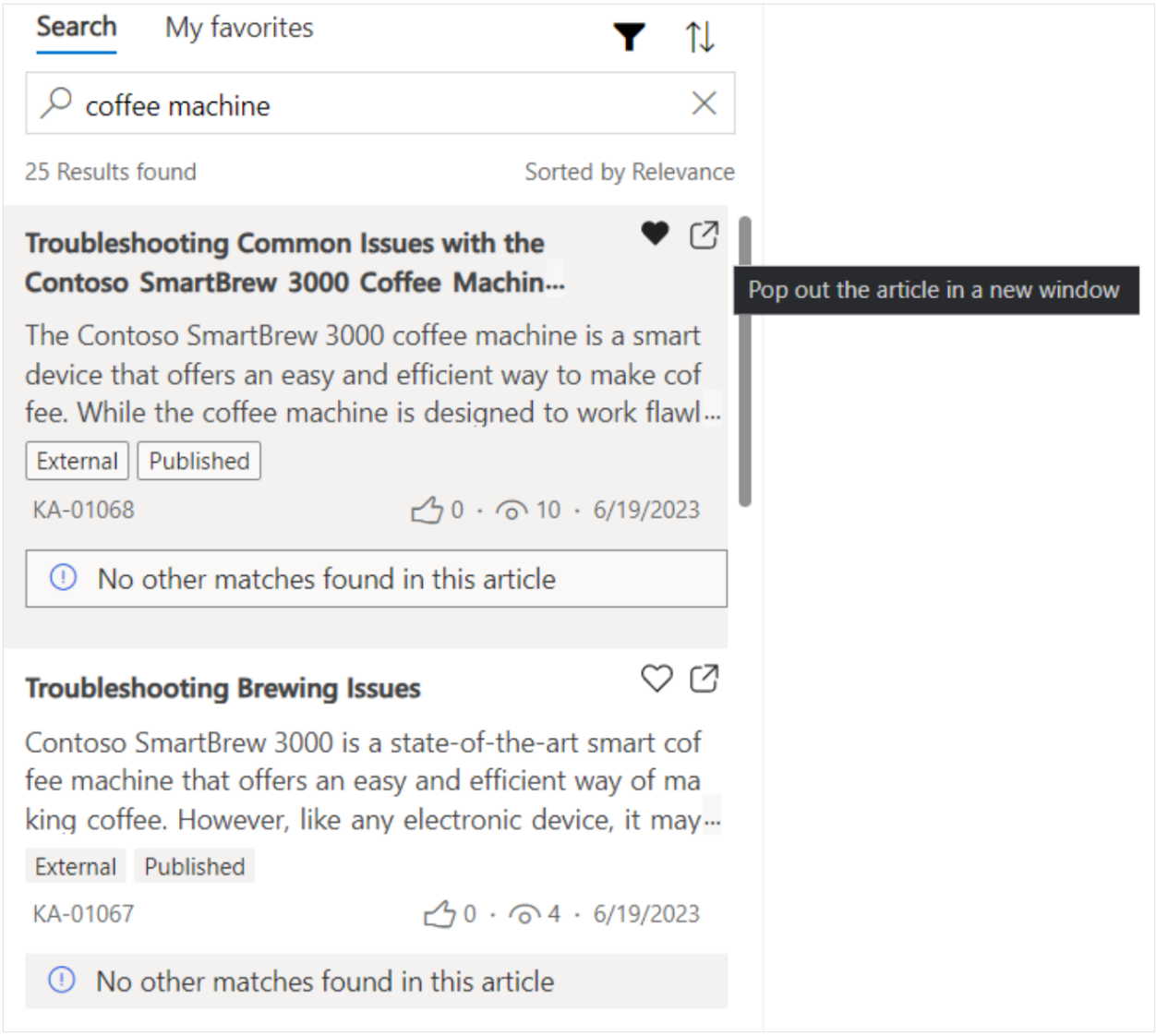


- Select the **Copy Link** icon to copy the external URL of the article to share with your customer in channels like chat or email.

The copy and email options are available only if the knowledge article is published on an external portal.

View the knowledge article on a new window

In Customer Service Hub, in the **Knowledge Search** reference pane, select the pop-out option to view the article on a new window.



See also

Filter knowledge articles

Link and unlink knowledge articles

Email a knowledge article

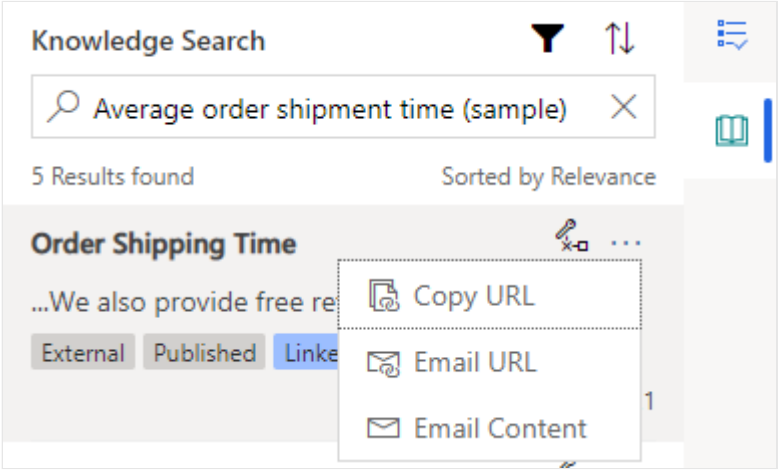
Submit ratings and feedback for knowledge articles

Email a knowledge article

Article • 08/25/2022

Email options

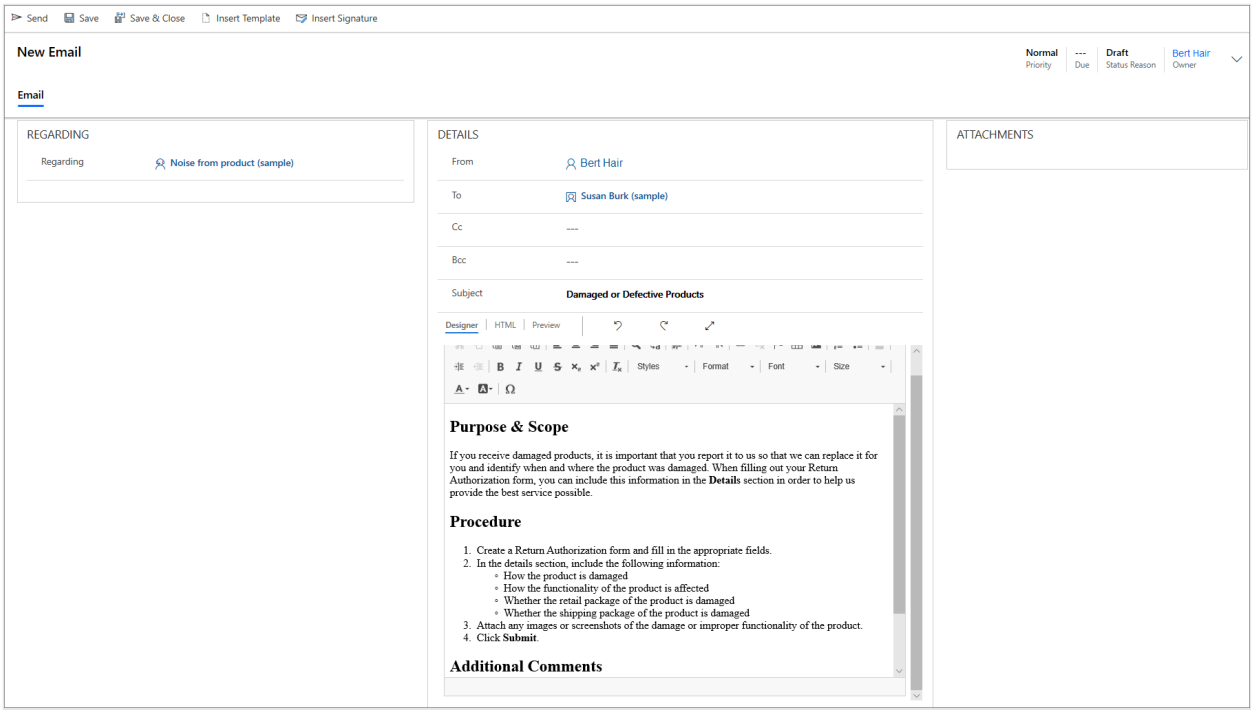
You can share the knowledge article link or knowledge article content through mail by selecting the ellipsis next to an article.



- **Copy URL**: You can copy the URL to share the knowledge article link.
- **Email URL:** The new email form opens with the link to the article in the mailbox.
- **Email Content:** The article content is populated in the mail body. The fields are automatically populated based on the case and customer details.

Email the knowledge article

Use the **Email** button to send the knowledge article via mail. When you select the **Email** button, first, the knowledge article is linked to the current case record. Simultaneously, an email form opens with the link to the article. The article content is populated in the email body. The fields are automatically populated based on the case and customer details. Add other information as needed, and then on the command bar, select **Send**.



You can perform these actions for only published or expired articles.

See also

Link and unlink knowledge articles

Create and manage knowledge articles

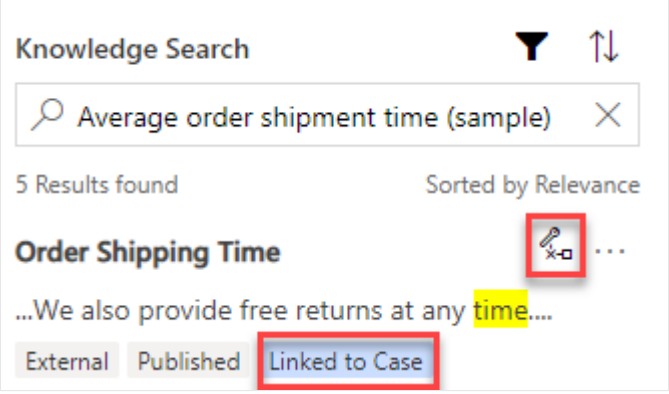
Understand knowledge base search mechanisms

Link and unlink knowledge articles

Article • 08/25/2022

Link and unlink the knowledge article to a record

You can associate and dissociate a knowledge article with a record. By default, the articles aren't linked to the case. When you select to link the article to the case, the link icon changes, and **Linked to Case** is displayed for the article.



Linked knowledge articles subgrid

The linked knowledge article subgrid is available for an entity, such as a case or account, only if your system administrator has added the subgrid to the entity form. The knowledge article subgrid displays the knowledge articles that have been linked with the entity. Some of the options available are as follows:

- Add a knowledge article
- Select and edit an article's content
- Sort
- Bulk operations

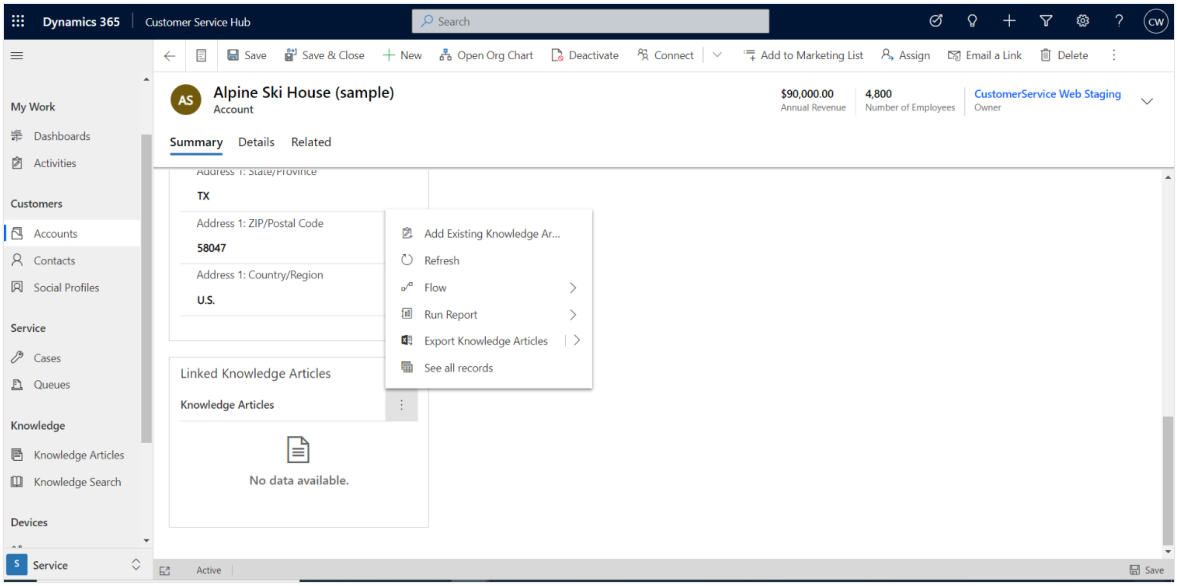
You can also edit a knowledge article by double-clicking it in the linked articles list.

To link the knowledge article to an entity, you need to do the following steps. For the sake of this example, let us consider the entity as Accounts.

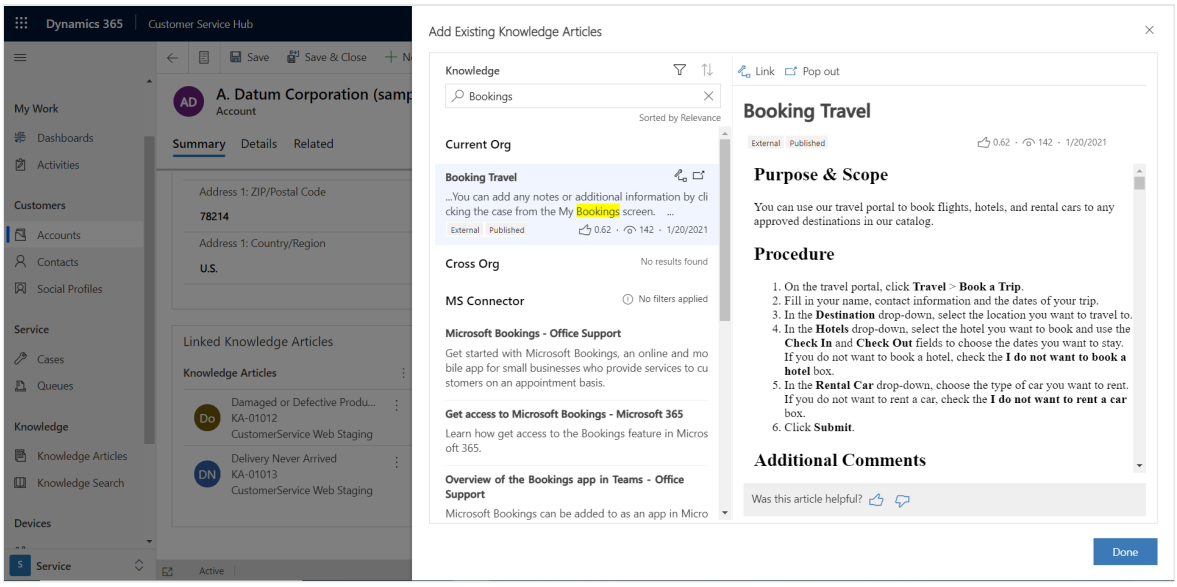
1. In the Customer Service Hub site map, go to **Customers** > **Accounts**.
2. Select any active account from the list of accounts.
3. On the **Summary** tab, scroll down to the **Linked Knowledge Articles** subgrid.

> **Note**
>
> The name of the subgrid can vary depending on the customizations your organization has made.

4. Select **More commands** (⋮), and then select **Add Existing Knowledge Article**.



5. Search for the knowledge article that you want to link, and select **Link.**



6. Select **Done**. The article will appear in the **Linked Knowledge Articles** subgrid.

See also

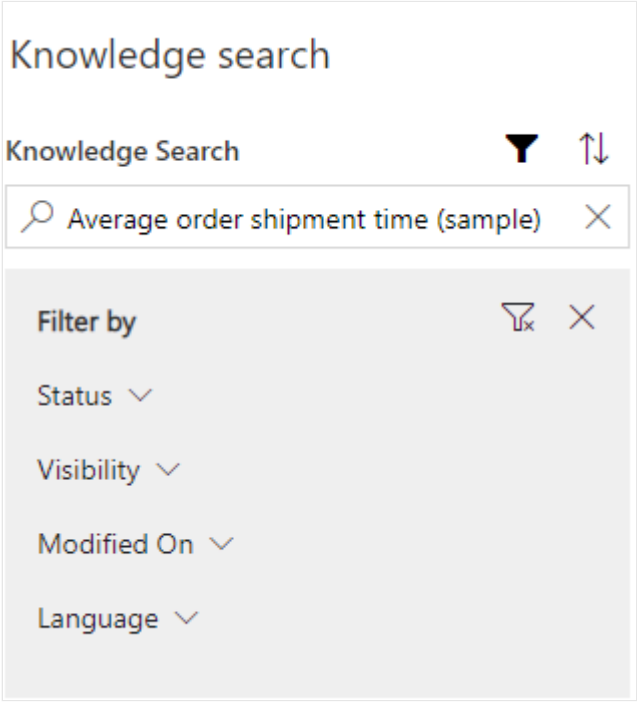
Create and manage knowledge articles
Understand knowledge base search mechanisms

Filter knowledge articles

Article • 08/25/2022

Filter knowledge articles

With the help of text and visual filters, you can filter knowledge articles.



When you select the filter icon, you can see the **Filter by** menu where you can filter the items based on the following categories.

Category	Sub-category
Status	• Draft • Approved • Published • Scheduled
Visibility	• Internal • External • All
Modified On	• Last 7 days • Last 30 days • Last 6 months • Last year • All

Category	Sub-category
Language	• List of languages **Note:** The language list is based on the articles that are present in those languages. For example, there are a total of 50 articles in five different languages such as French, English, Japanese, Spanish, and Danish. The language filter will show only these five languages.

Personalize your knowledge search article filters

If your administrator has configured knowledge filter personalization settings, as an agent, you can select the filters you want to use.

You can do the following:

- Set preselects
- Activate or deactivate a filter

Only the filters that your administrator has configured are viewable. If your administrator deactivates a filter, that filter becomes invisible without notifying you. If you notice that a filter has suddenly disappeared, contact your administrator for assistance. If your administrator disables all filters, you won't see any filters, and a message will be displayed that says, "No filters have been configured. Contact your administrator."

Any personalization you make to your filter selections will also be applicable to the form-based knowledge control and standalone knowledge base search page.

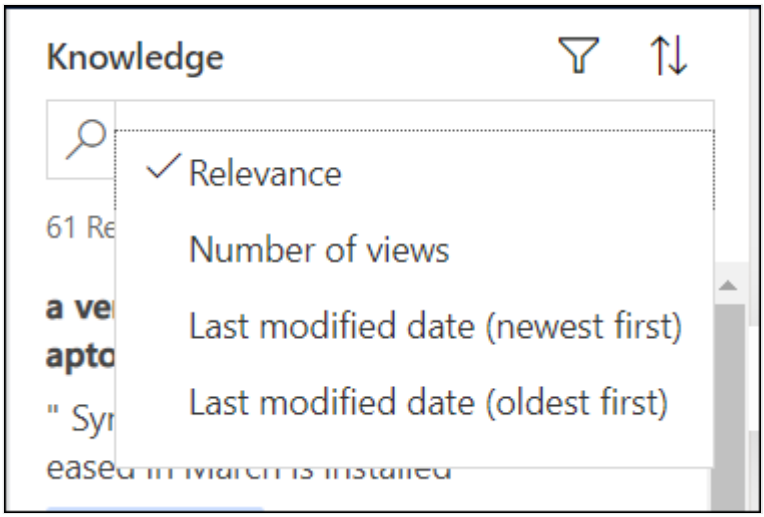
If you deactivate a filter, it will appear as deactivated. If you reactivate the same filter later, the filter will keep its previous configuration.

1. In **Customer Service Hub**, go to **Service** > **Knowledge** > **Knowledge Personalization**.
2. For each filter value you want to change, select the ellipsis in the top-right corner, and then select **Preselects**.
3. To make a filter value available by default, toggle the preset next to the filter to the right so that **Preselected** appears next to the filter name.
4. When you are finished making your selections, select **Done** > **Save**.
5. If you want to deactivate a filter, select the ellipsis in the top-right corner for the filter you want to stop using, and then select **Deactivate**.
6. Select **Done** > **Save**.

7. When you are ready to reactivate the filter, select the ellipsis again, and then select **Activate**. All of the previous configurations will be reinstated.

Sort knowledge articles

The knowledge base search control also enables you to sort the knowledge articles.



Select the up-arrow icon to view the sorting options and select an option from the following:

- Relevance
- Number of views
- Last modified date (newest first)
- Last modified date (oldest first)

View auto-filtered results

As a customer service agent, to view the most relevant results, you can have knowledge articles automatically filtered based on the case data. This helps with identifying the most relevant articles so that you can resolve customer queries quickly and accurately. You can also disable the auto-filter results and search the entire knowledge base. Auto-filtered results option is only available on single session.

An administrator or system customizer must configure this option for you. More information: Configure automatic filtering

To view the auto-filtered results:

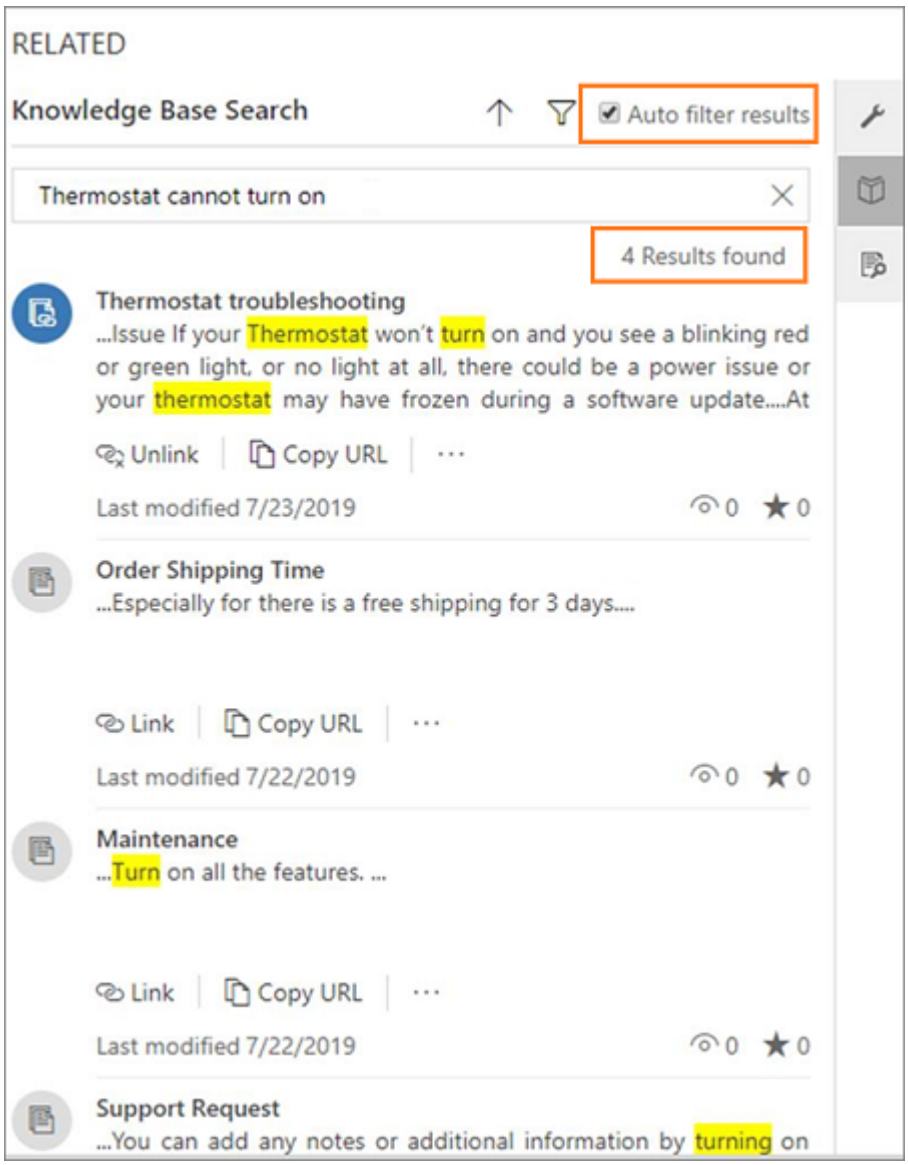
1. Search knowledge articles from the related section of the case. More information: Search knowledge articles. The articles are automatically filtered and displayed based on case data.

2. If you want to disable the automatic filtering option and search the entire knowledge base for articles, deselect **Auto-filter results**.

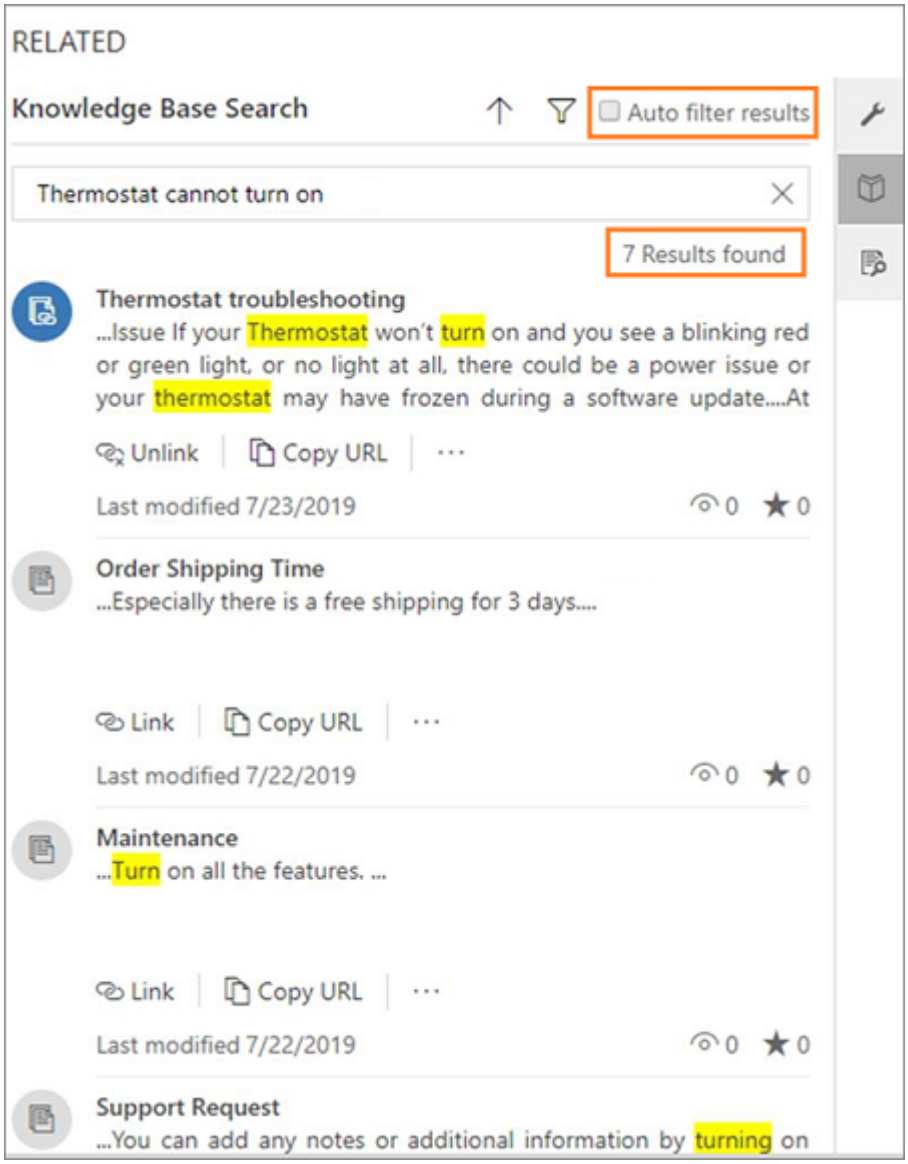
> **Note**
>
> Your administrator or system customizer must enable **Users can turn off automatic filtering** option for you to see the **Auto-filter results** option. If the **Users can turn off automatic filtering** option isn't enabled, you'll always see the auto-filtered results. More information: **Configure automatic filtering**

Here's an example.

In the following illustration, the case subject is **Xbox**. If automatic filtering is configured on the case subject, with the **Auto filter results** checkbox selected, only those knowledge articles whose subject is **Xbox** are displayed. Other articles are automatically filtered out, as shown in the following image.



However, if the **Auto-filter results** checkbox isn't selected, you can see more articles that aren't related to the subject. These are the results from the entire knowledge base.



See also

Search knowledge articles

Create and manage knowledge articles

Understand knowledge base search mechanisms

Submit ratings and feedback for knowledge articles

Article • 08/03/2023

You can easily provide feedback on knowledge articles with the help of knowledge article rating. Knowledge managers can capture and review the feedback on the articles to improve and maintain a relevant knowledge base.

In the Customer Service workspace, when you open an article from the **Knowledge Search** tab, you can select either the **Thumbs up** or the **Thumbs down** option to state whether the article was helpful. If you select the **Thumbs down** option, you see a **Comments** box, where you can also enter your feedback for the article.

To rate or provide your feedback for an article listed on the productivity pane, select and open the article on the preview pane.

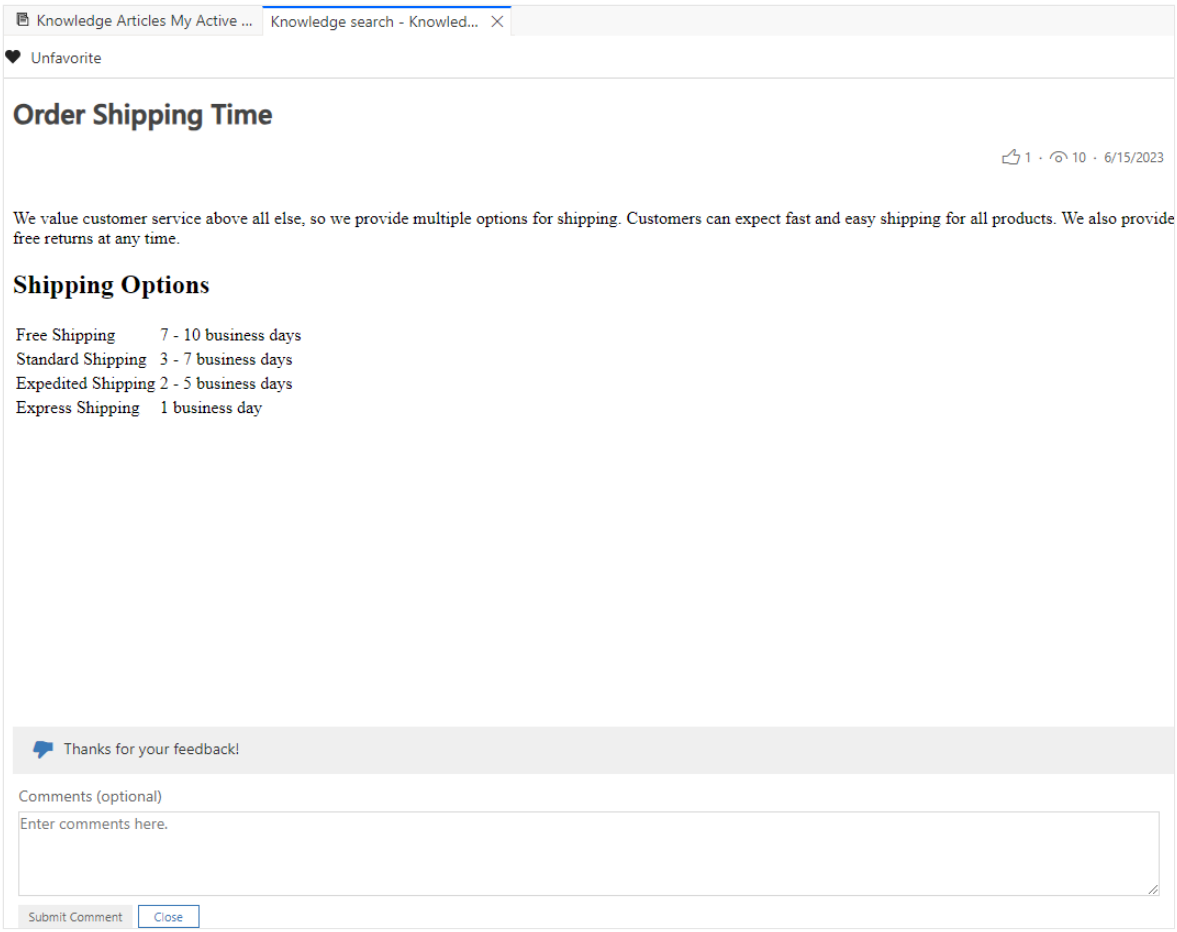
The value beside the **Thumbs up** icon doesn't represent an article's total number of likes. The number that you see might range from 0 to 1 and can include decimals such as 0.75. This is because the value beside the **Thumbs up** icon indicates the average rating of the article based on the feedback and the number of ratings received. The **knowledgearticle.rating** field is a rollup field defined as Aggregate(Average(feedback.normalizedrating)).

> ⓘ **Note**
>
> - Rating and view count numbers are rollup fields that aren't updated instantly. For more information, see **Define rollup fields**.
> - Customer service agents and customer service managers can create or view feedback based on their role and privileges in the feedback entity. Out of the box, customer service agents can create, view, or edit their own feedback only. Customer service managers or knowledge managers can view feedback submitted by all agents.

Submit ratings and feedback

1. On the Customer Service workspace site map, select **Knowledge Search**.
2. On the **Search** tab, select and open an article from the search results.

3. Select **Thumbs up** if the article was helpful to you, or select **Thumbs down** if it wasn't. Optionally, you can submit your feedback in the **Comments** box.



See also

Set up knowledge management

Enable an entity for feedback/ratings

Search knowledge articles

Create and manage knowledge articles

Understand knowledge base search mechanisms

Add the Knowledge Base Search control to forms

Convert a case to a Knowledge article

Article • 12/14/2022

There are times when existing knowledge articles don't contain relevant information for resolving a case. You, as an agent, can now contribute to the knowledge base by turning all information that's been researched for a case into a knowledge article. You can convert one case into multiple knowledge articles.

1. Make sure you have Create permissions on the Knowledge Article entity.
2. In the list of active cases, open the one that has the information that you want to convert to a knowledge article.
3. On the command bar, select the ellipsis **(...)** and go to **Convert To** > **To Knowledge Article**.

   The **Convert to Knowledge Article** dialog box opens. The title, owner, and subject of the article are populated based on the title, owner, and subject of the case. The content of the article is automatically populated with the description of the case. If the case is resolved, the content field shows the case description, case resolution, and case resolution description.
4. If you want to open the newly-created article, select the **Open the new knowledge article** field to set it to **Yes**, and then select **Convert**. Otherwise, set it to **No**.
5. If you set **Open the new knowledge article** to **Yes**, a knowledge article form opens. Fill in the necessary information for the knowledge article, and then select the **Save** button. More information: Create and manage knowledge articles

The knowledge article is created regardless of whether you set **Open the new knowledge article** to **Yes** or **No**.

See also

Learn the basics of the Customer Service Hub

Use the Main form and its components

Understand how search works in knowledge management

Article • 08/25/2022

Introduction

Setting up a comprehensive knowledge base is the key to increased customer satisfaction and improved productivity. A knowledge base is created to help you with solutions to the most common customer issues so that you can assist customers quickly. This topic describes how various search methods work in a knowledge base and how you can view accurate search results based on the keywords or operators that you use to search the knowledge base.

Dataverse search is enabled by default in all production environments, except those using their own encryption key. For more information, go to Enable Dataverse search. When Dataverse search is enabled, knowledge management search control uses Dataverse search to search for knowledge articles. For more information, go to What is Dataverse search?. If Dataverse search isn't enabled, the search mechanism switches to full-text search, which lets you run full-text queries against character-based data in SQL Server tables. For more information, go to Full-text search.

Depending on the configurations made in Dataverse search through the Quick Find view columns list, you can view the information provided in search results, such as keywords, description, attachments, or article number. More information: Prerequisites

How search works

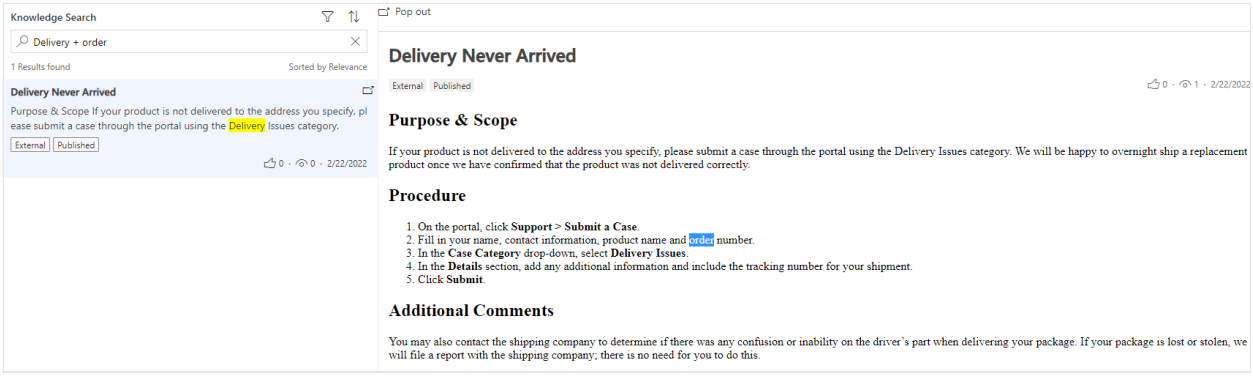
By default, the search mode is "any", which means that the search results will include articles that contain any of the search keywords you entered. However, if you have Dataverse search enabled along with the **Knowledge search logic** option in **Settings**, the search mode will be set to "all". This means that the search results will return records that contain all the search keywords you entered. More information: Set up knowledge search logic.

However, irrespective of your search settings, you can use the following search methods to search for your knowledge articles.

Boolean operators

AND operator

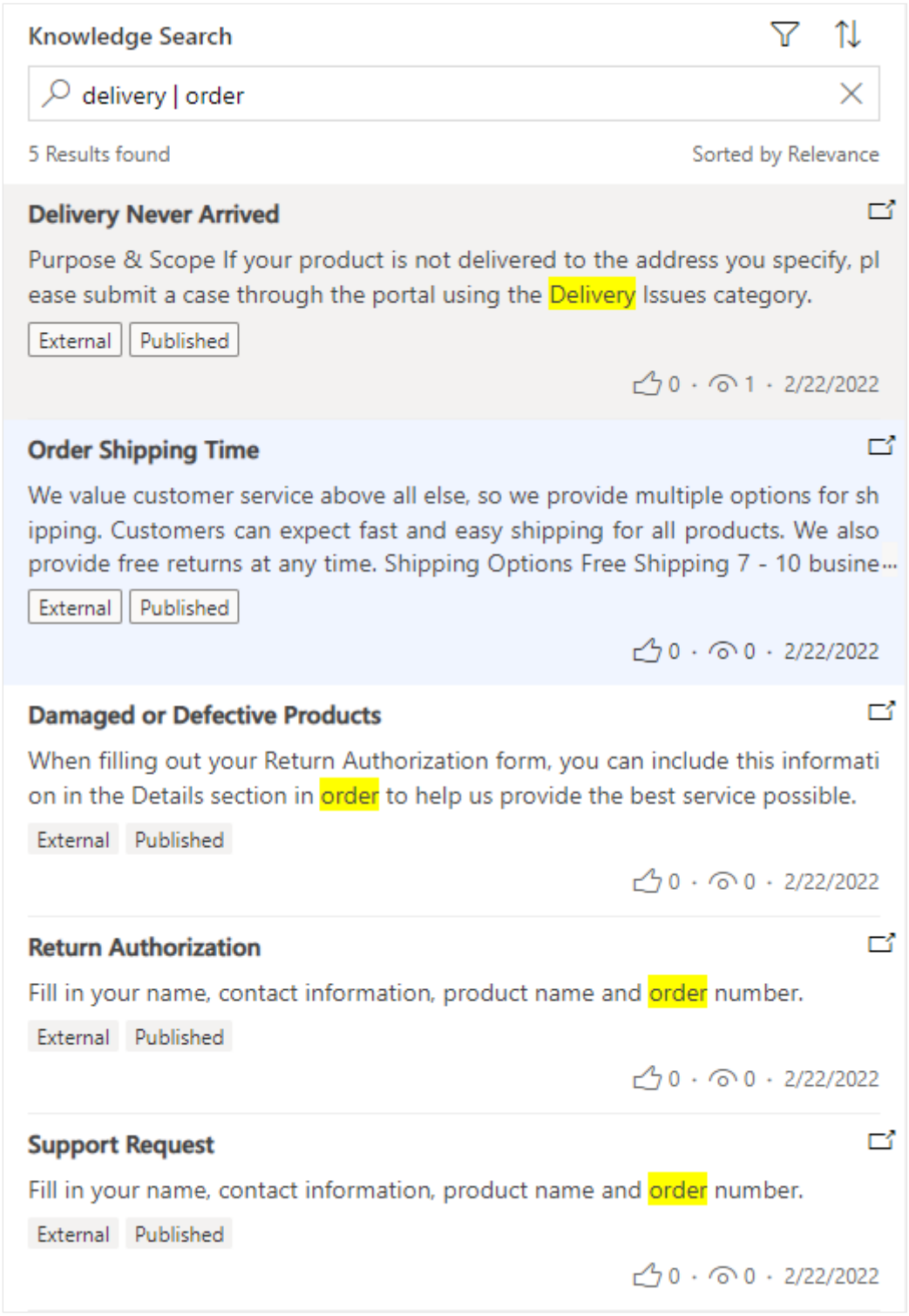
Use the AND operator when you need to search with a combination of words. The search results will only include articles that contain all the individual terms separated by (+). For example, **Delivery + order** returns the article **Delivery Never Arrived** which has **Delivery** and **order** in the article content.



- Query: AND operator; denoted by +

OR operator

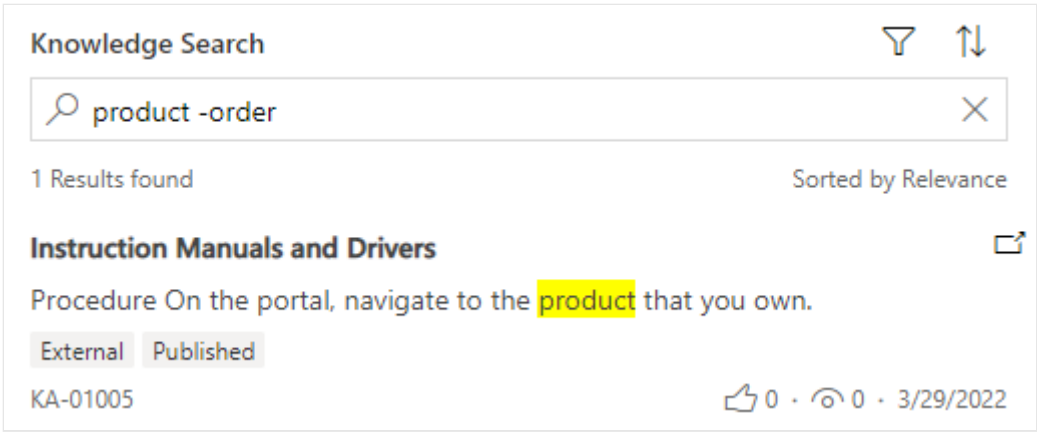
Use the OR operator to search for either of terms. Search terms separated by a vertical bar (|). For example, searching for **delivery | order** returns records with reference to either term.



Query syntax: OR operator; denoted by |

NOT operator

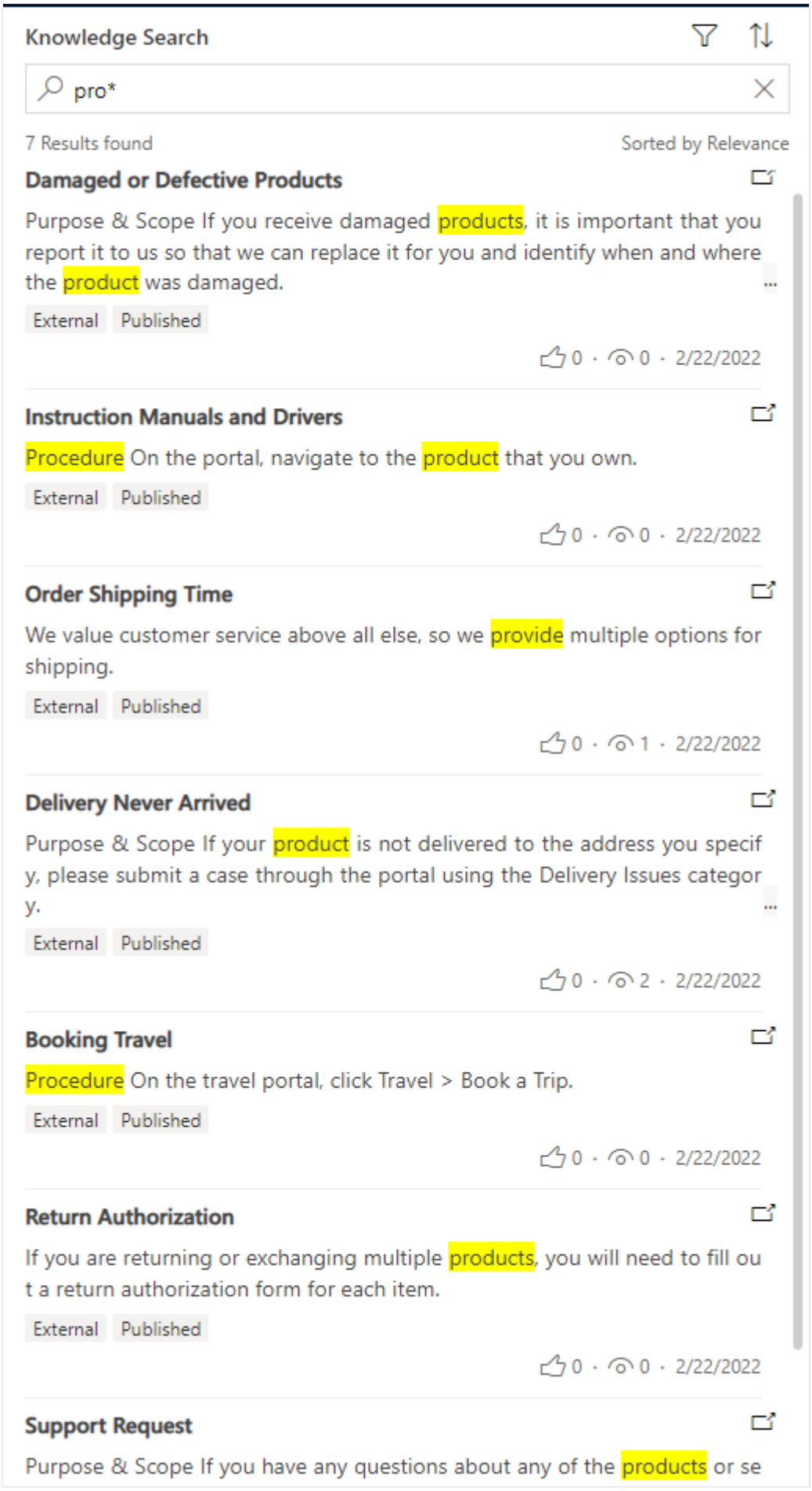
Use the NOT operator with a hyphen (-) before a keyword to indicate that it should be excluded from the search results. For example, when you search for **product**, all rows matching the term product will appear in the search results. However, searching for **product -order** will match all rows that contain the term **product** but not the term **order**.



- Query syntax: NOT operator; denoted by -

Wildcards

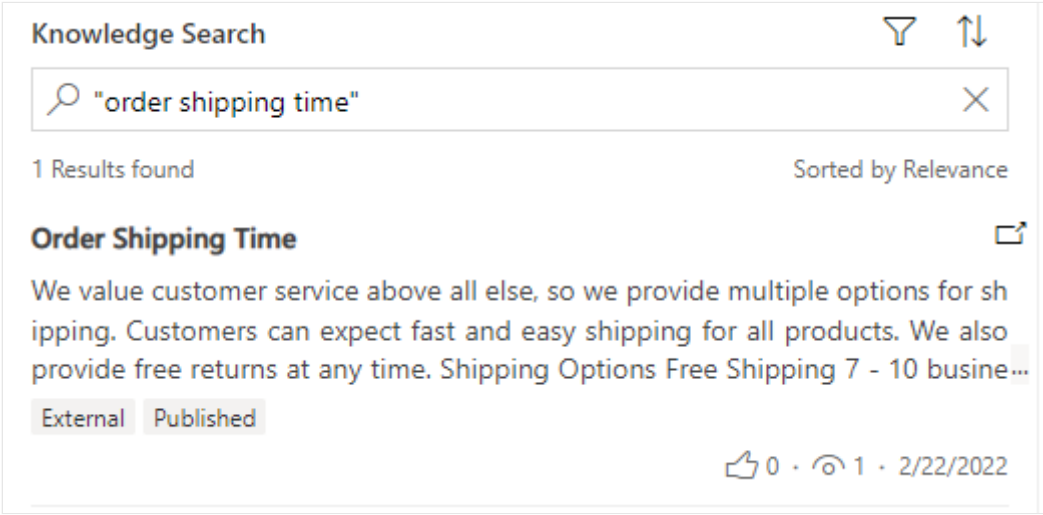
Use wildcards as placeholders for one or more text characters. Use an asterisk at the beginning or end of a keyword. For example, searching on **pro*** will show results for all records associated with a keyword that starts with **pro**. **Pro*** searches for **product**, **products**, and **procedure**.



- Query syntax: Search term with asterisk at the beginning or end of a keyword.

Exact matches

Use double quotation marks around a keyword to search for an exact match. For example, searching on "order shipping time" will match those exact keywords in an knowledge article. This type of search ignores commonly used words such as a, an, and the.



- Query syntax: Search term with double quotation marks around it.

See also

Add the Knowledge Base Search control to forms Create and manage knowledge articles Understand knowledge base search mechanisms Set up a search provider in Customer Service Hub Add a knowledge article subgrid to a form

Search the knowledge base on portals

Article • 09/28/2023

Having a knowledge base on the portal makes it a customer self-service portal where you can access and search for knowledge articles through simple queries. This functionality helps resolve issues and makes information easily accessible. You can search for your knowledge articles by selecting **Knowledge Base** from your portal.

You can search for a knowledge article after it's published to the portal. For more information, go to Publish knowledge articles. You can also share knowledge articles as URLs on an external portal. For more information, go to Set up knowledge management.

The following are the search options that you can use to search the knowledge base on the portal:

- **Lucene.Net search**: Searches within multiple tables and fields at once. More information: Search
- **Progressive search**: Lets you search without any mismatch between the results count and the number of records returned in the search results. More information: Configure progressive search counts
- **Dataverse search**: Lets you search across multiple tables sorted by relevance. For more information, go to What is Microsoft Dataverse?. To configure dataverse search on portals, go to Configure Dataverse search in portals (preview).
- **Faceted search**: Lets you search content on portals through filters based on content. More information: Use faceted search to improve portal search

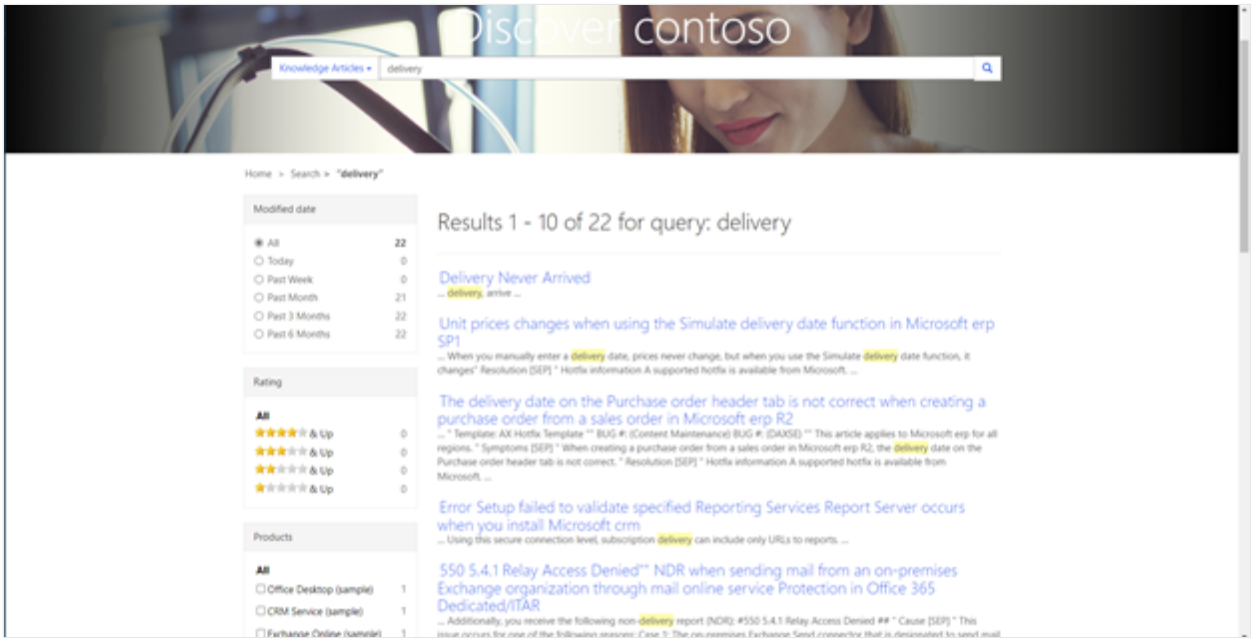
Use faceted search to refine the knowledge articles search query

Faceted search allows you to filter knowledge articles based on **Record Type**, **Modified date**, **Rating**, and **Products** to find the content you're looking for.

The following section describes how the search results are rendered:

- When you select a product from the product facet, search results only for the knowledge articles associated with that product are displayed.
- If the number of search results is less than 100, the exact number of results is displayed against the product facet.

- If the number of search results exceeds 100, a plus sign (+) appears against the product facet.
- If you go to the next page, the next 100 search results with the associated product facets are displayed.



Enable content access levels for knowledge articles from a portal

You can set the content access levels for users to control access to knowledge articles on a portal. More information: Manage knowledge articles by using content access levels

For content access level to work with relevance search, you must perform the following steps in the Dynamics 365 Portals app:

1. In the Portal Management site map, in the **Website** area, select **Site Settings**.
2. Select **New**.
3. Enter **Name** as **Knowledge Management/ContentAccessLevel/Enabled**.
4. Select your website record.
5. Set the Value to **true**. By default, the value of the site setting is set to **false**.
6. Select **Save**.

When performing a search on the portal, you might encounter an error while opening an article and also see the error message, "Update your origins allowlist if any iframe in the article doesn't work or displays error." This might be because the link types used in the article aren't a part of the origins allowlist. You must contact your administrator to update your origins allowlist. More information: Configure the origins allowlist for knowledge articles

See also

Add the Knowledge Base Search control to forms
Create and manage knowledge articles
Manage knowledge articles by using content access levels

Add the Knowledge Base Search control to forms

Article • 08/25/2022

Add a **Knowledge Base Search** control to Dynamics 365 for Customer Engagement forms to make it easy for users in your organization to find knowledge articles so they can answer common customer questions and resolve their issues right from the records, without having to switch to a different application.

You can configure the Knowledge Base Search control to:

- Show automatic suggestions in search results based on certain fields, or based on text analytics. The text analytics feature in only available for Dynamics 365 for Customer Engagement.
- Define filters that users can use on search results.
- Choose from a set of predefined contextual actions the users can take on an article.
- Add the control on any section of any entity that is enabled for knowledge management, including the timeline, and custom entities. The control is enabled in the case entity out of the box, and is added to the following forms:
  - Case main form - In the **Activity wall** section
  - Case for interactive experience main form – In the **Related** section

  > ⓘ **Note**
  >
  > The Knowledge Base Search control can be used on Microsoft Dynamics 365 for tablets and phones. However, some actions like Pop Out, Email Link, and Email Content aren't supported.

Microsoft Dynamics 365 Customer Service supports the native knowledge management, and this option is available for the Dynamics 365 Customer Service app users.

Prerequisites

Before you add the Knowledge Base Search control, make sure to:

- Set up knowledge management in Dynamics 365 for Customer Engagement. More information: Set up knowledge management
- Select the entity you want to enable knowledge management on while setting up knowledge management.

> **Note**
>
> All customization tasks for the Customer Service Hub must be done in Microsoft Dataverse.

Add the Knowledge Base Search control to main forms

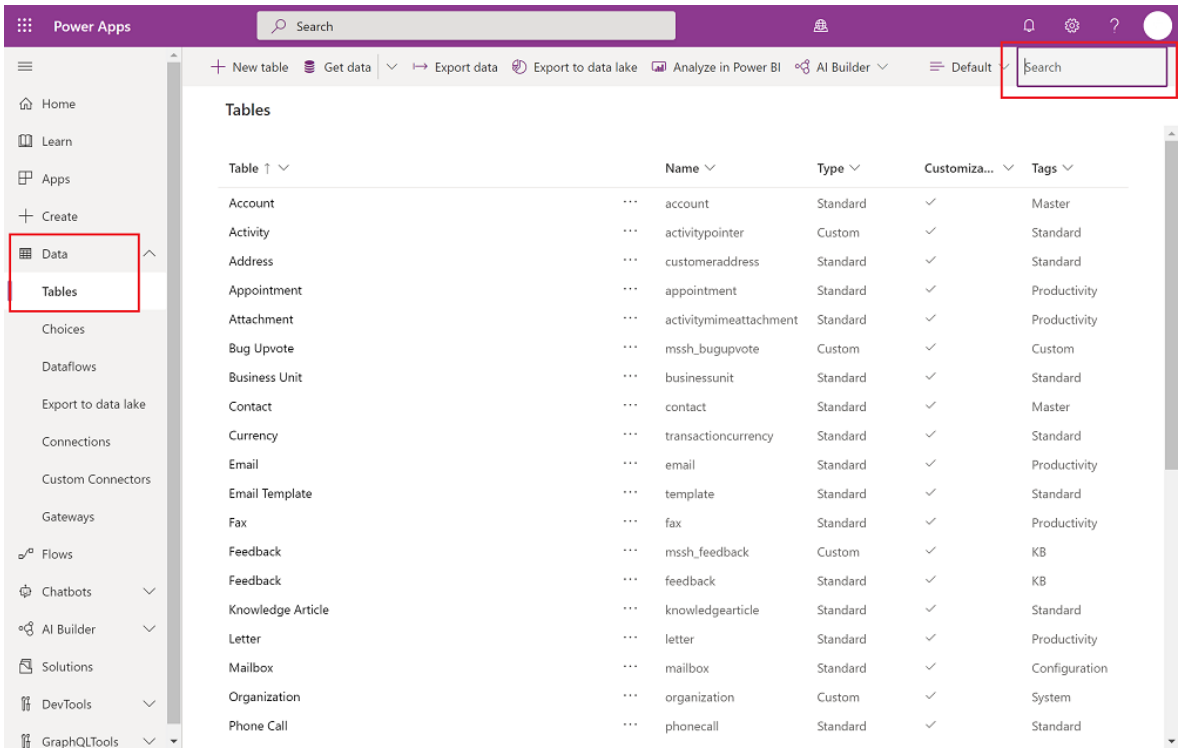
Depending on which experience you're using, you can add the knowledge base search control to main forms by using one of the following methods:

- Power Apps experience
- Web client experience

Power Apps experience

Make sure that you have the System Administrator or System Customizer security role or equivalent before you begin.

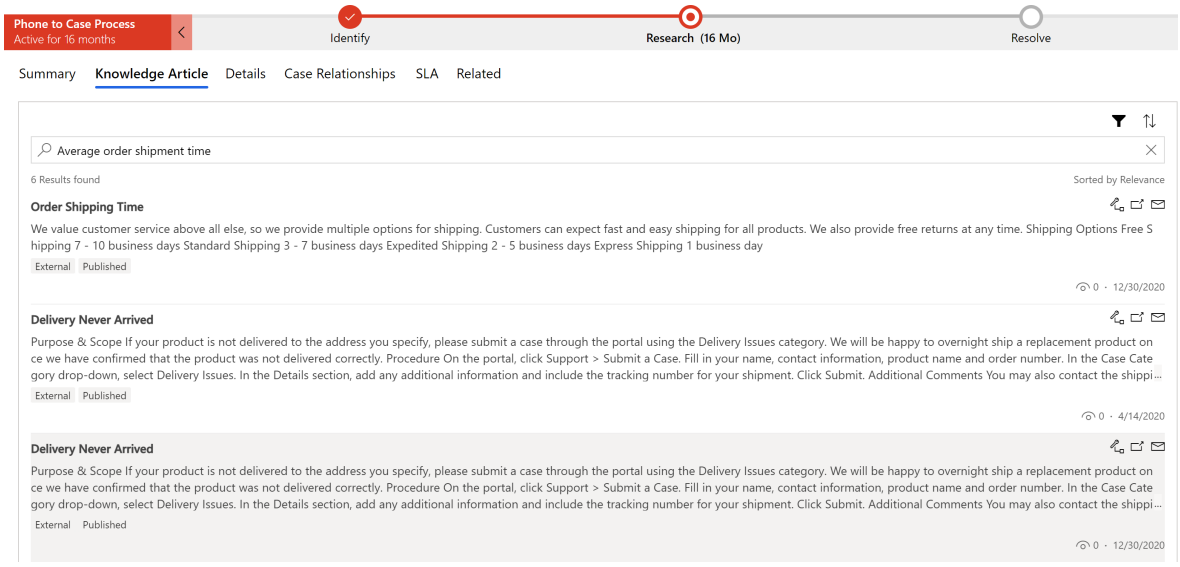
1. Go to Power Apps, and then on the left pane, select **Data** > **Tables**.
2. Ensure you have the Customer Service App installed, and then in the upper-right corner of the window, change **Default** to **All**.
3. Select the entity for which Knowledge is enabled. To search for the entity, in the **Search** field, enter the entity name.



4. Select the entity name, select the **Forms** tab, and then open the form where you want to add the knowledge control. To add the control, create a section and then add a knowledge search control within it. Select **+Component** to add a new component, select **Related Data**, and then **Knowledge Search**.

> **Note**
>
> If the option to add Knowledge Base Search is disabled, it could be because knowledge management isn't set up or isn't enabled for the entity for which you're adding the search control. Also, this control won't be enabled for reference panels until a later date.

5. After you've added your new section, select **Save and Publish**. You might need to refresh the screen to see the new section.



The knowledge properties will now be displayed in the standard view at runtime.

The following table describes the properties you can configure.

Property	Description
Reference name	**Required**: The unique name for the tab that's used when referencing it in scripts. The name must follow these rules: • Can't be empty • Must be a unique name • Must start with a letter only • Must contain only alphanumeric characters and underscores • Can't be greater than 100 characters
Label	**Required**: The localizable label for the tab visible to users. The label must follow these rules: • Can't be empty • Must be a unique name • Must start with a letter only • Must contain only alphanumeric characters and underscores • Can't be greater than 100 characters

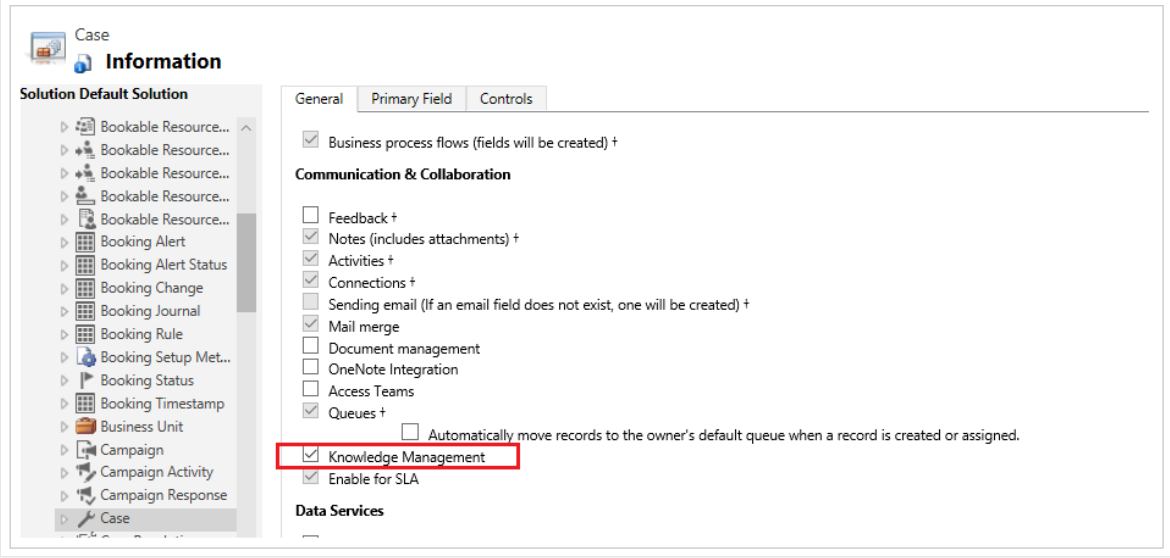
Property	Description
Results shown on page	Select the number of articles to be displayed in the search results. **Note**: What you specify in this field isn't applicable if at least one search provider is configured. For each configured search provider, three articles are displayed in the search results. More information: Set up a search provider in Customer Service Hub. If Relevance Search is enabled, the number of results that are displayed might differ from what you set due to the default Relevant Search setting. Your system administrator must disable Relevance Search or enable Simple Relevance Search for this property to work correctly. (Simple Relevance Search queries only articles, excluding attachments and notes.) For more information, see Understand knowledge base search mechanisms.
Automatic search > Provide search results using	After you open the entity form, automatic search is performed by using the field you specify in the field below. If you've enabled automatic suggestions, select the field for the entity that Dynamics 365 Customer Service will use to suggest article results in the Give knowledge base (KB) suggestions drop-down list. For example, if you're adding the search control to the Account entity and want Dynamics 365 Customer Service to automatically show search results that contain the account name, select Account Name in the drop-down list. **Note**: This drop-down list can include all fields that are text, multi-line text, or lookup type fields.
Actions	**Link article**: Lets users link a knowledge article to the record they're viewing the knowledge article search results in. **Unlink article**: Lets users unlink a knowledge article from a primary record. **Copy URL**: Lets users copy the external URL of the article so they can share it over channels like chat or email. In the native Dynamics 365 customer engagement knowledge management solution, the Copy URL option is available only for published articles. **Open in new tab**: Opens a knowledge article in a new tab within the same browser window. **Link article and email URL**: Lets users associate an article with the primary record and share the article URL with the customer through email. **Link article and send article content**: Lets users associate an article with a primary record and share the contents of the article with the customer through email.

Property	Description
Select default email recipient	Select who the email will be sent to when an agent sends the article link in email. This drop-down list includes all fields for the entity that are enabled for email (for example Customer, Contact, or Responsible contact). When the agent chooses to send a link to the article to the customer, the To field is automatically populated with the value of the field that you select here. If you leave it blank, in the email recipient display, it will show as blank and you need to fill it in manually.
Show article rating	Shows the rating on an article.
Show status filter	Allows the user to filter knowledge articles based on article status: Draft, Approved, or Published.
Show article language filter	Allows the user to filter knowledge article search results based on the language they choose. If you want users to see search results only for articles in a specific language, in the **Set Default Language** drop-down list, select a language. By default, User's Default Language is selected: • If you select User's Default Language, search results will be filtered based on the signed-in user's default language. • If the language you select isn't an active language, the search results will be filtered by using the signed-in user's default language. • If you select User's Default Language and the user's default language isn't an active language, the first active language available alphabetically is used as the default filter. • To let users select a different language filter on search results so they can see other articles in other languages, select the **Users can change Language Filter** check box. Only when you enable this option will users see an option to change the filter in the Search pane in a record.
Edit default filter selection	Allows you to change the default display for filtered articles, whether you want to show Draft, Approved, or Published articles.

Property	Description
Add refinement rules	Refinement rules function the same as automatic filtering in the web client experience. This feature opens a pop-out window where you can define more precise search results. Refinement rules help ensure that your customer service agents receive only the most relevant knowledge articles. As an administrator, you can configure rules so that knowledge articles are filtered based on source entity data without manual input from your agents. For example, if you set up refinement rules on the subject of a case, the knowledge articles that have the same subject as the case will be filtered in and will be shown to the agents. Other articles are automatically filtered out. Refinement rules can be extended to automatically filter knowledge articles on any lookup field that's present on source entities. **Note**: Polymorphic lookups aren't supported. Agents also have an option to turn off the filtering and search the entire knowledge base.

Web client experience

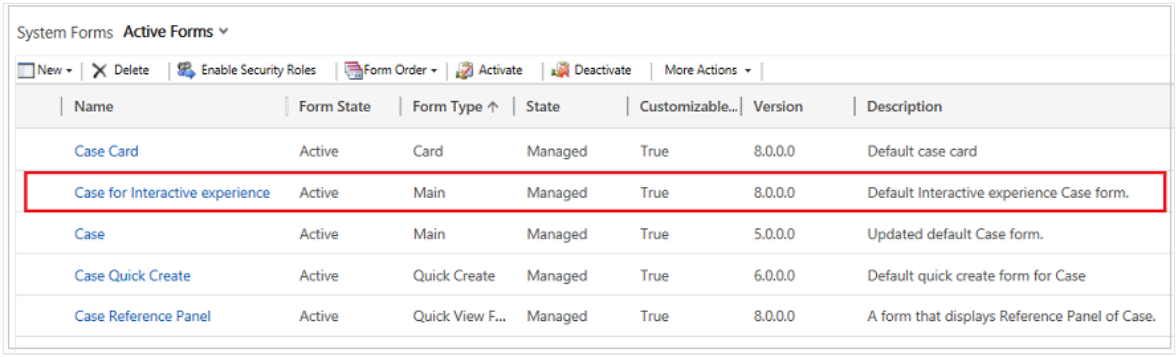
1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.
2. Go to **Settings** > **Customizations**.
3. Choose **Customize the System**.
4. In the solution explorer, choose the entity you want to add the search control to, and under **Communication & Collaboration**, make sure the **Knowledge Management** check box is selected.



Select the **Save** icon to save the setting for the entity.

5. Expand the entity you're adding the search control to, and select **Forms**.

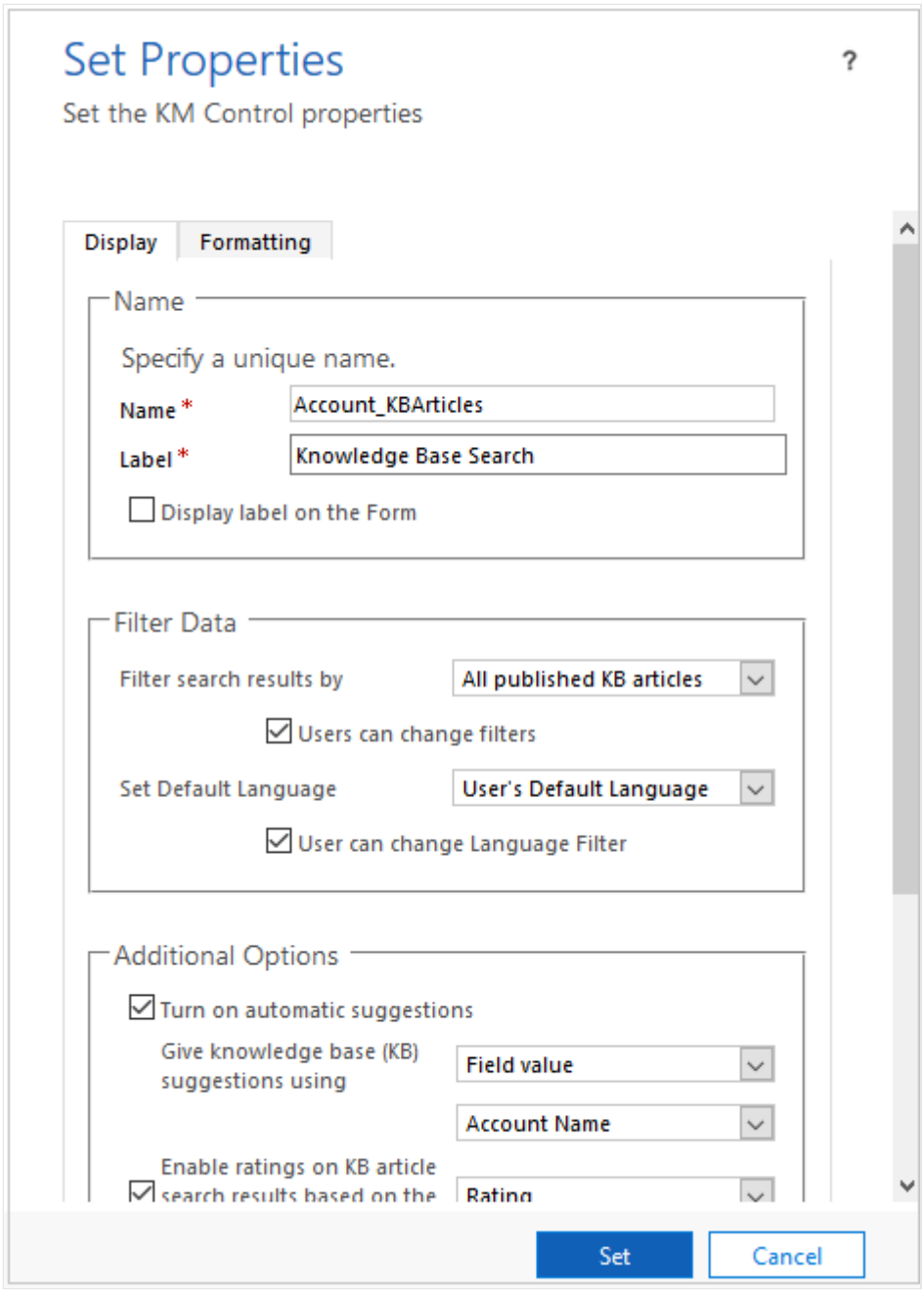
6. Choose the entity form of type **Main**.



7. Select the area where you want to place the search control, and on the **Insert** tab, select **Knowledge Base Search**.

   If the option to add Knowledge Base Search is disabled, it could be because knowledge management isn't set up or isn't enabled for the entity you're adding the search control to.

8. In the **Set Properties** dialog box, on the **Display** tab, specify fields as described in the following table, and then select **Set** to apply the settings.



Tab	Property	Description
Display	Name	**Required**: The unique name for the tab that is used when referencing it in scripts. The name can contain only alphanumeric characters and underscores.
	Label	**Required**: The localizable label for the tab visible to users.

Tab	Property	Description
	Filter Search results by	In the **Filter search results by** drop-down list, select the set of article states that you want Dynamics 365 Customer Service to search in: • In the native Dynamics 365 Customer Service knowledge solution, you can choose from all draft articles, all approved articles, or all published articles. • To let users select a different filter on search results so they can see other types of articles, select the **Users can change filters** check box. Only when you enable this option will users see an option to change the filter in the Search pane in a record. While searching for a knowledge article in the Related section (Reference panel), the following fields of a knowledge article are searched for the keywords that you enter: **Title**,**Content**, **Keywords**, **Description**, and **Article Public Number**. For more information, go to Search for knowledge articles.
	Set Default Language	If you want users to see search results only for articles in a specific language, in the **Set Default Language** drop-down list, select a language. By default, User's Default Language is selected: • If you select User's Default Language, search results will be filtered based on the signed-in user's default language. • If the language you select isn't an active language, the search results will be filtered by using the signed-in user's default language. • If you select User's Default Language, and the user's default language isn't an active language, the first active language available alphabetically is used as the default filter. • To let users select a different language filter on search results so they can see other articles in other languages, select the **Users can change Language Filter** check box. Only when you enable this option will users see an option to change the filter in the Search pane in a record.

Tab	Property	Description
	Additional Options	If you want Dynamics 365 Customer Service to suggest articles automatically based on the value in certain fields of the entity, select **Turn on automatic suggestions**. If you've enabled automatic suggestions, select the field for the entity that Dynamics 365 Customer Service will use to suggest article results in the **Give knowledge base (KB) suggestions** drop-down list. For example, if you're adding the search control to the Account entity and want Dynamics 365 Customer Service to automatically show search results that contain the account name, select Account Name in the drop-down list. **Note**: This drop-down list can include all fields that are text, multi-line text, or lookup type fields. If you want the article rating to appear for each article in the search results, select the **Enable ratings on KB article search results based on the specified field** check box, and then select the field from the drop-down list.
	Select Primary customer	In **Select primary customer**, select who the email will be sent to when a customer service rep sends the article link in email. This drop-down list includes all fields for the entity that are enabled for email, for example Customer, Contact, or Responsible contact. When the customer service rep chooses to send a link to the article to the customer, the **To** field is automatically populated with the value of the field that you select here.
	Number of results	Select how many articles to show in the search results at first. **Note**: If Relevance Search is enabled, the number of results that are displayed might differ from what you set due to the default Relevant Search setting. Your system administrator must disable Relevance Search or enable Simple Relevance Search for this property to work correctly. (Simple Relevance Search queries only articles, excluding attachments and notes.) For more information, go to Understand knowledge base search mechanisms.

Tab	Property	Description
	Actions	Select whether you want to make all the default actions available to reps or only selected ones. If you choose **Show Selected Actions**, select the actions you want to show. The following actions are available: • **Link the KB article**. Lets users link the knowledge article to the record they're viewing the knowledge article search results in. • **Unlink**. Lets users unlink the knowledge article from the primary record. • **Copy link**. Lets users copy the external URL of the article, so they can share it over channels like chat or email. In the native Dynamics 365 Customer Service knowledge management solution, the **Copy Link** option is available only for published articles. • **Link KB article and email link**. Lets users associate an article with the primary record and share the article link with the customer through email.
Formatting	Layout	Choose the type of layout to determine the number of columns the control should occupy.
	Row Layout	Select the maximum number of rows per page.

Configure automatic filtering for the web client

Improve knowledge article suggestions and search results by enabling automatic filtering. Automatic filtering ensures your customer service agents receive only the most relevant knowledge articles. As an administrator, you can configure Knowledge Base Search control to automatically filter knowledge articles based on case data without any manual input from the agents.

For example, if you set up automatic filtering of knowledge articles on the subject of the case, the knowledge articles that have the same subject as the case will be filtered in and will be shown to the agents. Other articles will be filtered out automatically.

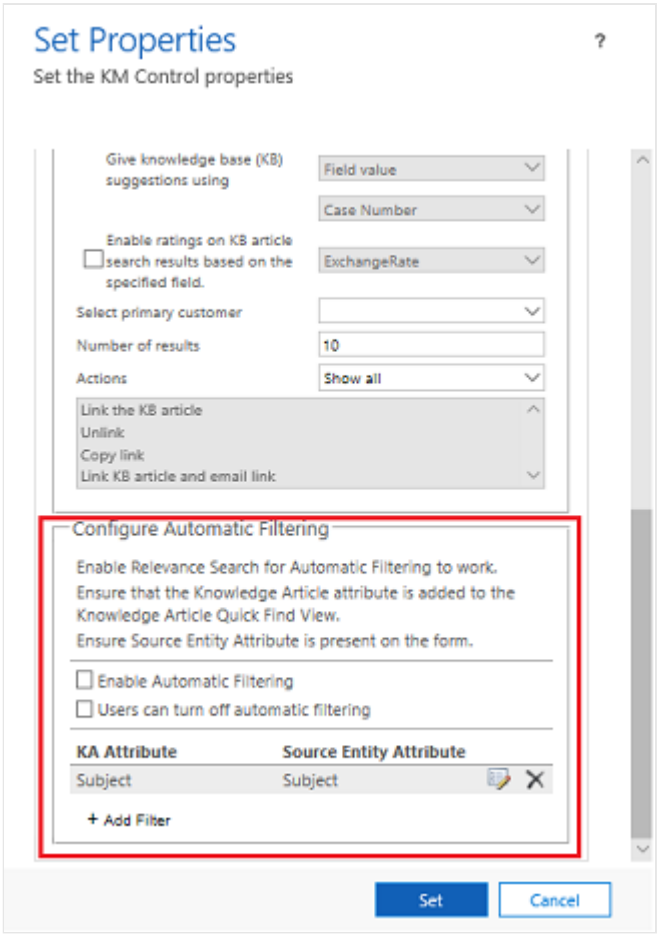
This feature can be extended to automatically filter knowledge articles on any lookup field that's present on both Case and Knowledge Article entities. Agents also have an option to turn off automatic filtering and search the entire knowledge base. Administrators can configure this option in the Knowledge Base Search control.

Open the **Knowledge Base Search** control and edit its properties to configure automatic filtering. In the **Set Properties** dialog box, on the **Display** tab, specify the following fields

in the **Configure Automatic Filtering** section.

1. Select the **Enable Automatic Filtering** check box to enable automatic filtering.
2. Select the **Users can turn off automatic filtering** check box if you want to provide your agents the option to turn off automatic filtering and search the entire knowledge base. This enables the **Auto filter results** option for agents on knowledge search control.
3. Select **Add Filter** to define filtering of knowledge articles on case subject or any other lookup field.
4. Select **Set** to save the properties.

> **Note**
>
> Ensure that Relevance search is enabled for automatic filtering to work. The Knowledge Article attribute must be added to the Knowledge Article Quick Find View. Ensure that the Source Entity Attribute is present on the form.



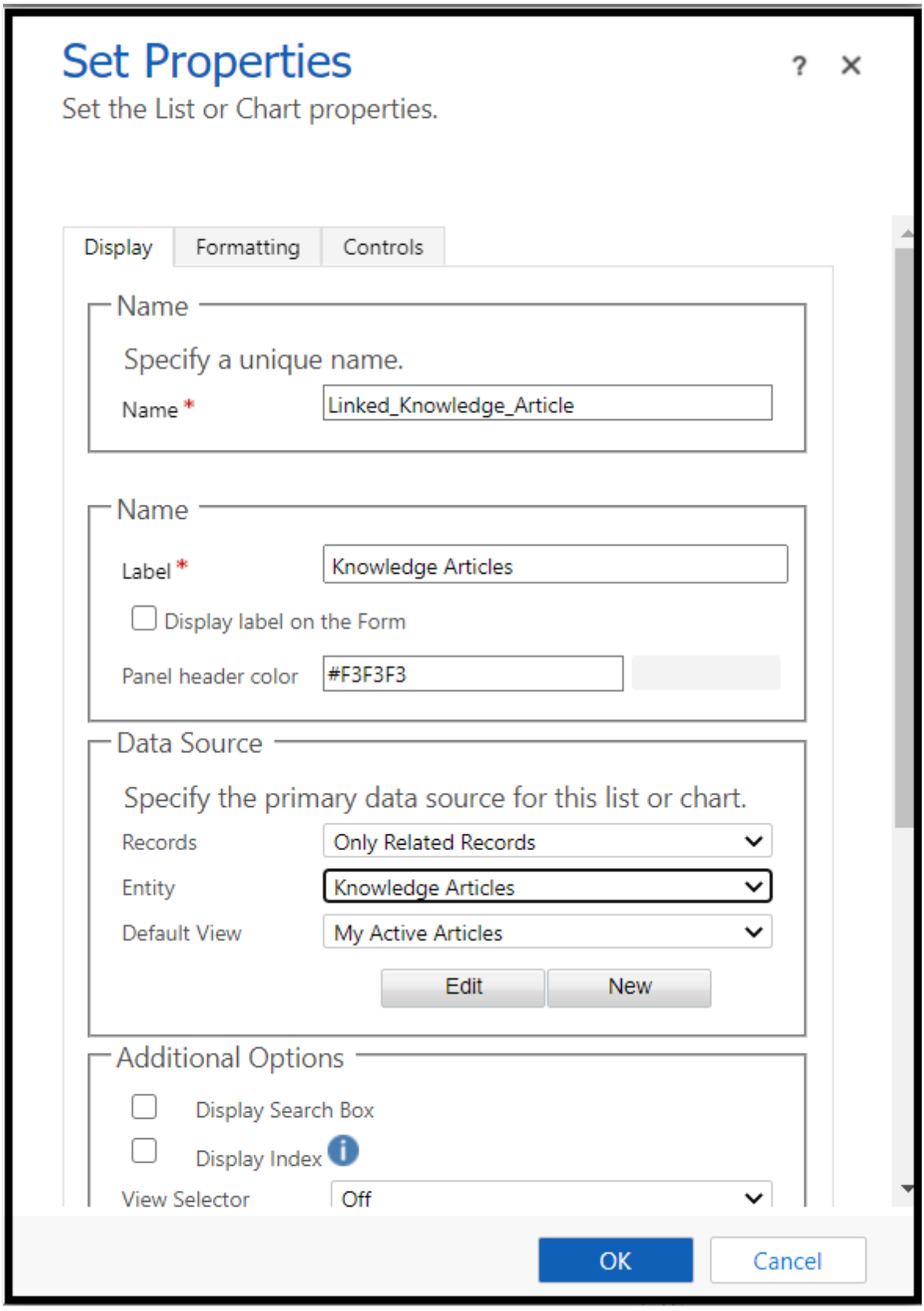
To learn more about how to use the automatic filtering option, go to View auto-filtered results

Add a knowledge article subgrid to a form

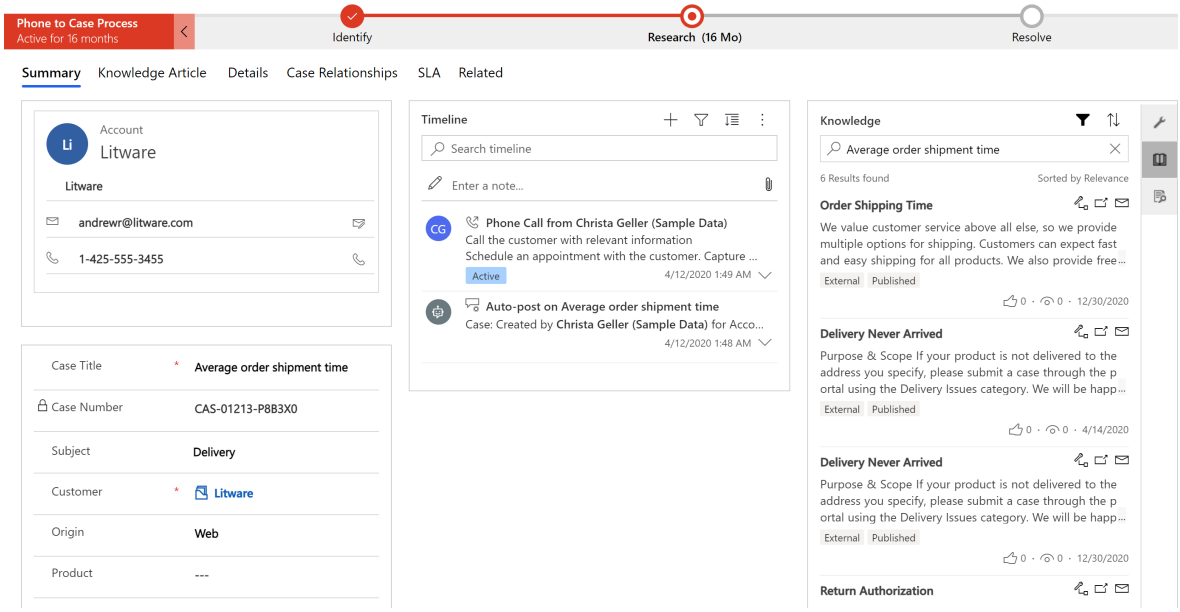
You can add a customized knowledge article subgrid to a form. To learn more about the components of a subgrid form, go to Add and configure a subgrid component on a form.

To add a subgrid

1. Sign in to the Dynamics 365 application, and then select **Settings** > **Advanced Settings**.
2. Select **Customizations** from the drop-down list, and then select **Customize the System**.
3. In the **Solution Default Solution** list, select the entity to which you want to add a subgrid, and then select **Forms**.
4. In the form designer, select **Insert** > **Sub-Grid**.
5. In the **Set Properties** dialog box, provide a unique name for your subgrid.
6. Ensure that the **Entity** value is set to **Knowledge Articles**.
7. Retain the default values for all the other fields, and then select **OK**.



8. Save your knowledge subgrid, and then select **Publish**.



The linked knowledge article subgrid that you add will be visible to the customer service representative on the entity form during runtime.

The Knowledge Search tab is available by default on the app side pane. You can use the knowledge search control either on the app side pane or embed it in the form through customization but make sure that you don't enable both simultaneously. Otherwise, when you try to access the embedded control, the "Error loading the control" message will appear.

See also

Reduce call handling times with Knowledge articles in the Customer Service Hub
Set up knowledge management using embedded knowledge search
Understand knowledge base search mechanisms
Linked knowledge articles subgrid

Add a knowledge article rich text editor control to a form

Article • 01/23/2023

By default, the rich text editor functionality is available for use with knowledge articles and emails. You can add the rich text editor control to other forms as well to leverage the benefits of the rich text editor functionality. More information: Use the rich text editor toolbar

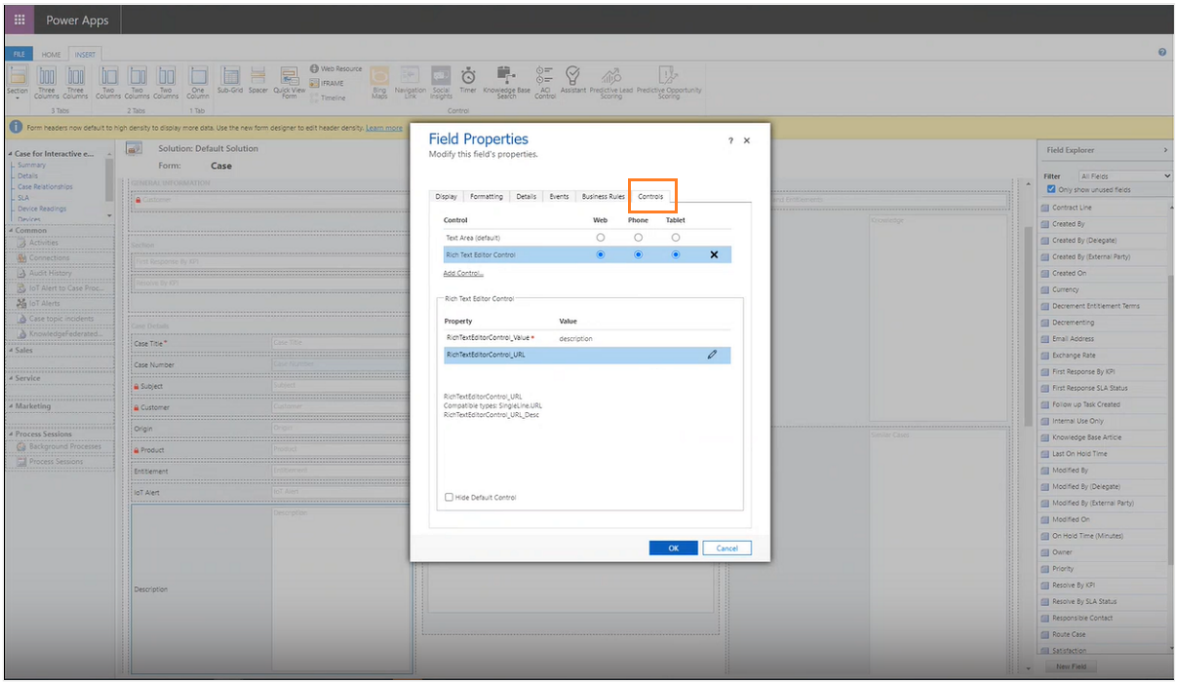
Add the rich text editor control to a form

Perform the following steps to add rich text editor control to a form.

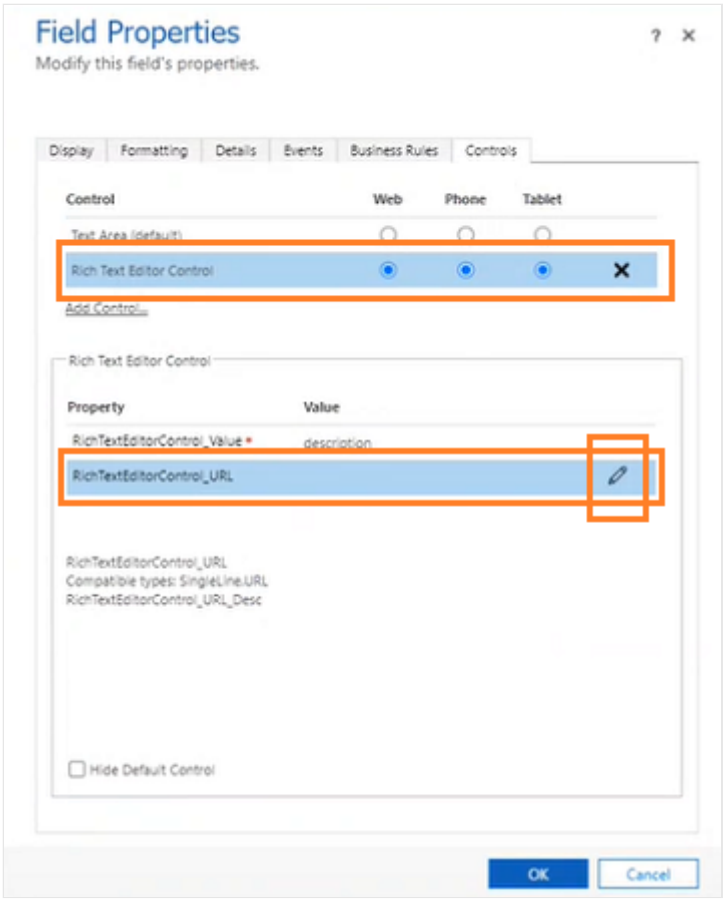
1. In Power Apps, go to the form where you want to add the rich text editor control, and double-click a field where you can enter single or multiple lines of text to open **Field Properties**.

2. On the **Field Properties** dialog, select the **Controls** tab.

3. Under **Controls**, select **Rich Text Editor Control**.

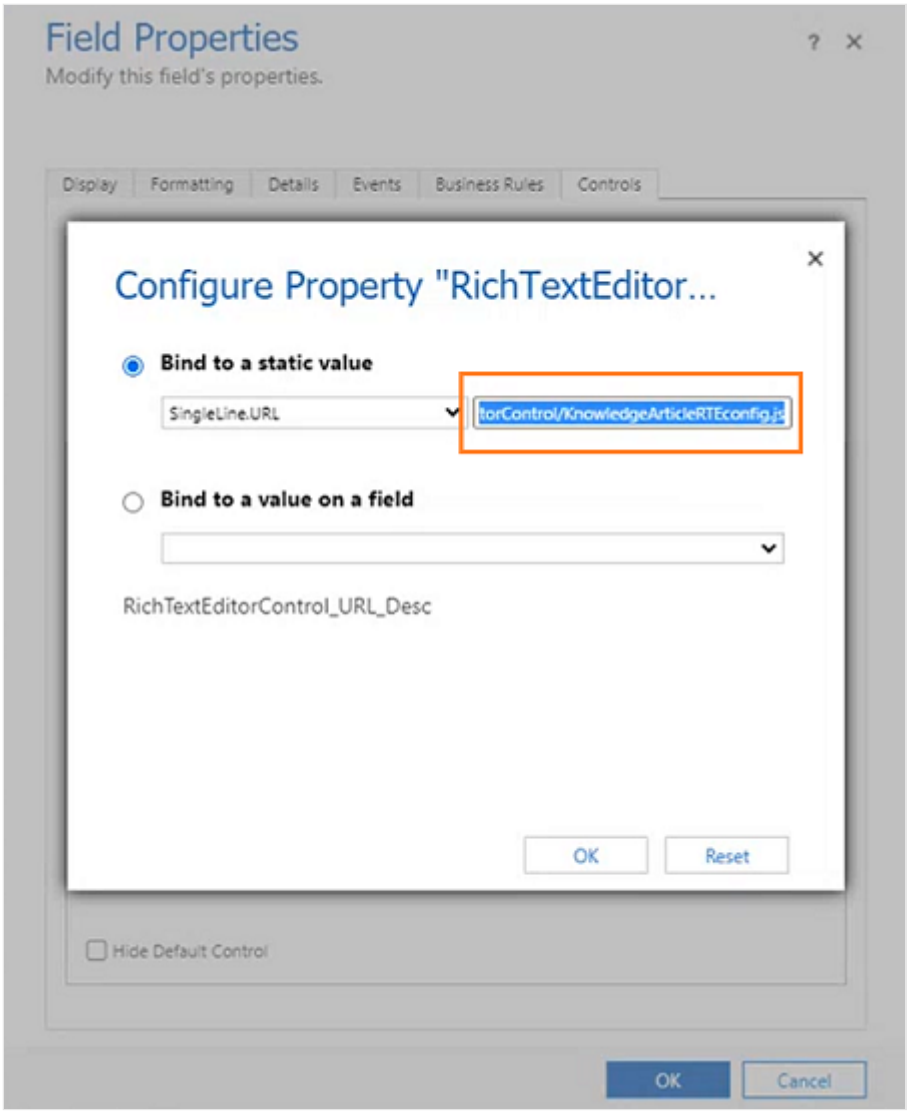


4. Under **Rich Text Editor Control** properties, select the pencil icon next to **RichTextEditorControl_URL**.



The properties configuration page is displayed.

5. In the **Bind to a static value** field, enter the following text:
   webResources/msdyncrm_/RichTextEditorControl/KnowledgeArticleRTEconfig.js



6. Select **OK** > **OK**, and then select **Save and Publish**.

For more information about rich text control properties, see Rich text editor control configuration options.

Configure the faceted search results web template from your portal

Article • 12/14/2022

You can view and search for knowledge article attachments on the portal based on Dataverse search. To do so, you must configure the faceted search results web template from your portal.

1. In the Portal Management site map **Content** area, select **Web Templates**.
2. From the **Active Web Templates** dropdown list, select your knowledge article web template.
3. On the **Web Template** page on the **General** tab, add the following snippet to the **Source** field.

JavaScript

```
                            {{#if relatedAttachments}}
                                {{#each relatedAttachments}}
                                    <li class="note-item">
                                    {{#if isImage}}
                                        <a id="kbattachment-{{entityID}}"
href="javascript:downloadKbAttachmentFile('kbattachment-{{entityID}}',
'{{title}}', {{fileSize}}, '{{fileType}}', '{{downloadBlockUrl}}',
'{{initializeDownloadUrl}}')"><span class="glyphicon glyphicon-file" aria-
hidden="true"></span> {{title}}</a>
                                    {{else}}
                                        <a id="kbattachment-{{entityID}}"
title="{{title}}" href="javascript:downloadKbAttachmentFile('kbattachment-
{{entityID}}', '{{title}}', {{fileSize}}, '{{fileType}}',
'{{downloadBlockUrl}}', '{{initializeDownloadUrl}}')"><span class="glyphicon
glyphicon-file" aria-hidden="true"></span> {{title}}</a>
                                    {{/if}}
                                    <p class="fragment text-muted">
{{{fragment}}}</p>
                                    </li>
                                {{/each}}
                            {{/if}}
<script type="text/javascript">
        function downloadKbAttachmentFile(attachmentElementId, fileName,
fileSize, mimeType, downloadBlockUrl, initializeUrl) {
                    // Download block API supports max 4MB block size
                    const blockSizeInBytes = 4096 * 1024;
                    const totalNumberOfBlocks = parseInt(fileSize /
blockSizeInBytes + 1);
                    var fileContinuationToken = "";
                    var contentString = "";
                    var numberOfBlocksDownloaded = 0;
                    var blockNumberToContentMap = {};
```

```
                    function downloadBlockCallback(i, result) {
                        numberOfBlocksDownloaded++;
                        blockNumberToContentMap[i] = result;
                        if (numberOfBlocksDownloaded == totalNumberOfBlocks)
{
                            for (var j = 0; j < totalNumberOfBlocks; j++) {
                                contentString += blockNumberToContentMap[j];
                            }
                            var isImage = mimeType.startsWith('image/');
                            const attachmentElement =
document.getElementById(attachmentElementId);
                            if (isImage) {
                                const bodyByteString = atob(contentString);
                                const bodyBuffer = new
ArrayBuffer(bodyByteString.length);
                                const bodyView = new Uint8Array(bodyBuffer);
                                for (var k = 0; k < bodyByteString.length;
k++) {
                                    bodyView[k] =
bodyByteString.charCodeAt(k);
                                }
                                var imageUrl = URL.createObjectURL(new
Blob([bodyBuffer], { type: mimeType }));
                                attachmentElement.href = imageUrl;
                                attachmentElement.target = "_blank";
                            }
                            else {
                                const linkSource = 'data:' + mimeType +
'; base64,' + contentString;
                                attachmentElement.href = linkSource;
                                attachmentElement.download = fileName;
                            }
                            attachmentElement.click();
                        }
                    }
                    shell.ajaxSafePost({
                        type: 'GET',
                        url: initializeUrl,
                        success: function (result) {
                            fileContinuationToken =
encodeURIComponent(result);
                            for (var i = 0; i < totalNumberOfBlocks; i++) {
                                url = downloadBlockUrl + "&blockNumber=" + i
+ "&fileContinuationToken=" + fileContinuationToken + "&blockSize=" +
blockSizeInBytes;
                                var x = downloadBlockCallback.bind(this,i);
                                shell.ajaxSafePost({
                                    type: 'GET',
                                    url: url,
                                    success: (result) => { x(result) }
                                });
                            }
                        }
                    });
```

```
                }
        </script>
```

4. Select **Save**.

See also

Add a file attachment to a knowledge article
Update knowledge article attachments for portal Display file attachments with knowledge articles

Create a knowledge article using a template

Article • 02/17/2022

Use the **msdyn_GetKAObjectFromTemplate** action to create a knowledge article from an existing knowledge article template programmatically.

Action parameters

The **msdyn_GetKAObjectFromTemplate** action requires the following parameters:

Name	Type	Nullable	Description
TemplateId	Edm.Guid	False	The GUID of the knowledge article template to use.

Action return type

Type	Description
KnowledgeArticle	The **msdyn_GetKAObjectFromTemplate** action returns the following value.

Example

Request

HTTP

```
POST [Organization URI]/api/data/v9.0/msdyn_GetKAObjectFromTemplate
Content-Type: application/json;charset=utf-8
OData-MaxVersion: 4.0
OData-Version: 4.0
Accept: application/json

{
    "TemplateId":"{A2AC047C-507D-E911-A828-000D3A1C16AF}"
}
```

Response

JSON

```
HTTP/1.1 200 OK
Content-Type: application/json; odata.metadata=minimal
OData-Version: 4.0

{
    "@odata.context":"[Organization
URL]/api/data/v9.0/$metadata#knowledgearticles/$entity",
    "@odata.type":"#Microsoft.Dynamics.CRM.knowledgearticle",
    "isinternal":false,
    "isinternal@OData.Community.Display.V1.FormattedValue":"No",
    "keywords":"test knowledge article",
    "title":"test",
    "_languagelocaleid_value":"56940b3e-300f-4070-a559-5a6a4d11a8a3",

"_languagelocaleid_value@Microsoft.Dynamics.CRM.associatednavigationproperty
":"languagelocaleid",

"_languagelocaleid_value@Microsoft.Dynamics.CRM.lookuplogicalname":"language
locale",
    "_subjectid_value":"8069216f-297d-e911-a828-000d3a53e137",

"_subjectid_value@Microsoft.Dynamics.CRM.associatednavigationproperty":"subj
ectid",
    "_subjectid_value@Microsoft.Dynamics.CRM.lookuplogicalname":"subject",
    "_subjectid_value@OData.Community.Display.V1.FormattedValue":"Query"
}
```

See also

Search for knowledge articles in the Customer Service Hub

Create and manage knowledge articles

Extend transformer logic on templates

Article • 03/17/2023

Transformer logic refers to moving the values of specific fields from the knowledge article template to the knowledge article. Standard fields are supported out of the box. Organizations can overwrite the out-of-the-box transformer logic by creating a plug-in and registering it as a `msdyn_GetKAObjectFromTemplate` message.

To extend the transformer logic for your knowledge article templates:

1. Create a plug-in by performing the steps mentioned in Create a plug-in project.
2. You can write your own mapping logic with the transformed `kaobject` using `context.OutputParameters["Result"]` as Entity. In this example, we'll show how you can build the knowledge article template transformer with the help of two new attributes, Article Type and Audience. In the plug-in that you created, replace the entire class with the following sample code:

```
///
```

```
    /// The plugin shows a sample of how to build a Knowledge Article
Template Transformer
    /// </summary>
    /// <remarks>
    /// To showcase the capabilities of the transformer, we have added 2 new
attributes to the Knowledge Article Template entity. These attributes have
also been added to the form.
    /// The first is Article Type with the logical name new_articletype that
is of type Option Set and points to a Global Option Set called Article Type
    /// The second is Audience with the logical name new_audience, also of
type Option Set. This is a local option set and has 3 values -
    /// Employee with value 100000000, Managers with value 100000001 and
Public with value 100000002
    /// Similarly, we have 2 new attributes on the Knowledge Article entity
which have been added to the Knowledge Article for Interactive Experience
form.
    /// The first is Article Type with the logical name new_kaarticletype
that is of type Option Set and points to the same Global Option Set Article
Type described earlier.
    /// The second is the Disclaimer with the logical name new_disclaimer
that is of type Single Line of Text. To ensure that it behaves like a
disclaimer, we have ensured that it is
    /// not editable on the form.
    ///
    /// The core goal of the transformer is to copy over the Option Set
value from the Article Type of the template record to the Article Type of
the article record.
    /// Having the same Global Option Set ensures that we don't need to
worry about mapping the values of one to the other. But that is also
```

```
possible as can be seen with the other attribute transform.
    /// Based on the audience of the template record, the disclaimer on the
article record is populated.
    /// </remarks>
    public class TemplatePlugin : IPlugin
    {
        #region Constants
        private const string TemplateIdParam = "TemplateId";
        private const string ResultParam = "Result";
        private const string KATemplateLogicalName =
"msdyn_knowledgearticletemplate";

        private const string KA_ArticleTypeName = "new_kaarticletype";
        private const string Tmpl_ArticleTypeName = "new_articletype";

        private const string KA_DisclaimerName = "new_disclaimer";
        private const string Tmpl_AudienceName = "new_audience";

        private const int Audience_Employee = 100000000;
        private const int Audience_Managers = 100000001;
        private const int Audience_Public = 100000002;
        #endregion

        public void Execute(IServiceProvider serviceProvider)
        {
            // Get all required services
            IOrganizationServiceFactory ServiceFactory =
(IOrganizationServiceFactory)serviceProvider.GetService(typeof(IOrganization
ServiceFactory));
            IPluginExecutionContext Context =
(IPluginExecutionContext)serviceProvider.GetService(typeof(IPluginExecutionC
ontext));
            IOrganizationService OrganizationService =
ServiceFactory.CreateOrganizationService(Context.UserId);
            ITracingService TracingService =
(ITracingService)serviceProvider.GetService(typeof(ITracingService));

            try
            {
                string templateIdStr =
Context.InputParameters[TemplateIdParam] as string;
                Guid TemplateId = new Guid(templateIdStr);


                Entity template = new Entity(KATemplateLogicalName);
                template =
OrganizationService.Retrieve(template.LogicalName, TemplateId, new
ColumnSet(GetColumns().ToArray()));

                Entity kaobject = Context.OutputParameters[ResultParam] as
Entity;

                TransformKAObject(kaobject, template);

            }
```

```
            catch (Exception ex)
            {
                TracingService.Trace("Exception: {0}", ex.Message);
                throw;
            }
        }

        #region Private Methods

        /// <summary>
        /// Returns a list of all the columns to be retrieved from the
template
        /// </summary>
        /// <returns>The list of columns to retrieve from the
template</returns>
        private List<string> GetColumns()
        {
            return new List<string> { Tmpl_ArticleTypeName,
Tmpl_AudienceName };
        }

        /// <summary>
        /// Transforms the <paramref name="templateEntity"/> template record
to the <paramref name="kaEntity"/> entity record
        /// </summary>
        /// <param name="kaEntity">The knowledge article entity record to
transform</param>
        /// <param name="templateEntity">The template entity used to
transform the article record</param>
        private void TransformKAObject(Entity kaEntity, Entity
templateEntity)
        {
            foreach (var attribute in templateEntity.Attributes)
            {
                if (!GetColumns().Contains(attribute.Key))
                {
                    continue;
                }
                kaEntity[GetKAAttributeName(attribute.Key)] =
GetKAConvertor(attribute.Key)(attribute.Value);
            }
        }

        /// <summary>
        /// Gets the mapped attribute name for the article entity for the
corresponding template attribute
        /// </summary>
        /// <param name="templateAttributeName">The attribute name used for
retrieving the mapping</param>
        /// <returns>The attribute name of the knowledge article entity that
maps to the <paramref name="templateAttributeName"/> template entity
attribute</returns>
        private string GetKAAttributeName(string templateAttributeName)
        {
            switch (templateAttributeName)
```

```
            {
                case Tmpl_ArticleTypeName:
                    return KA_ArticleTypeName;
                case Tmpl_AudienceName:
                    return KA_DisclaimerName;
                default:
                    return string.Empty;
            }
        }

        /// <summary>
        /// Gets the object convertor for the article entity for the
corresponding template attribute
        /// </summary>
        /// <param name="templateAttributeName">The attribute name used for
retrieving the mapping</param>
        /// <returns>A function that can transform the value stored in the
template entity <paramref name="templateAttributeName"/> attribute to the
knowledge article entity</returns>
        private Func<object, object> GetKAConvertor(string
templateAttributeName)
        {
            switch (templateAttributeName)
            {
                case Tmpl_ArticleTypeName:
                    return (object templateValue) =>
                    {
                        return templateValue;
                    };
                case Tmpl_AudienceName:
                    return (object templateValue) =>
                    {
                        var audienceVal = templateValue as OptionSetValue;
                        switch (audienceVal.Value)
                        {
                            case Audience_Employee:
                                return "Internal Use Only";
                            case Audience_Managers:
                                return "For Managers Only";
                            case Audience_Public:
                            default:
                                return "Generally Available";
                        }
                    };
                default:
                    return (object templateValue) =>
                    {
                        return null;
                    };
            }
        }
        #endregion
    }
```

3. Follow the steps mentioned in Register a plug-in to register your plug-in.
4. Now, when you create a knowledge article from a template, the values of the option sets are transformed and inserted in the article.

See also

Create a knowledge article using template
Tutorial: Write and register a plug-in

Transform, map external source data to knowledge fields

Article • 03/01/2023

When you're mapping information from external data providers to knowledge article entities, if the source value is of a different data type, you'll have to transform the value before you can map it to the target knowledge attribute. You can create a plug-in and register it on `Create` and `Update` messages so that the target knowledge article attributes have values that are inline with the articles from the external providers.

To transform and map the source values, perform the following steps:

1. Create a custom field in the `KnowledgeArticle` entity. More information: How to create and edit columns.
2. Map the required external source value to the newly created custom field. More information: Configure knowledge article schema mapping (preview). This is a temporary mapping from which your plug-in picks up the source value.
3. Create a plug-in. For more information, see: Create a plug-in project.
4. You can write your own code to convert the external source value and map it to the required target knowledge article attribute.
   In this example, we'll show how you can map a source value that's of the type **String** to an article field attribute of type **OptionSet**. In the plug-in that you created, replace the entire class with the following sample code.

C#

```
using System;
using System.Collections.Generic;
using System.Linq;
using System.Runtime.Remoting.Contexts;
using System.Runtime.Remoting.Services;
using System.ServiceModel;
using Microsoft.Xrm.Sdk;
using Microsoft.Xrm.Sdk.Messages;
using Microsoft.Xrm.Sdk.Metadata;

namespace PowerApps.Samples
{
   /// <summary>
   /// The plug-in shows the sample code to map the external source value to
the target attribute, when they're of different types
   /// </summary>
   /// <remarks>
   /// To showcase the capabilities of the plugin, we have added 2 new
```

```
attributes to the KnowledgeArticle entity.
   /// The first attribute new_documentationcentersourcevalue is a String
attribute that is mapped to the external source value. This is a temporary
mapping that stores the source value.
   /// The plugin picks up the source value from
new_documentationcentersourcevalue. The source value can take the following
values: Develop, Content, and Test.
   ///The second attribute, new_documentationcenter, is the target attribute
of type OptionSet to which the source value must actually be mapped to.
   /// Develop with value 100000000, Content with value 100000001, and Test
with value 100000002
   /// The goal of this plugin to read the value from the
new_documentationcentersourcevalue, retrieve the option set metadata of the
target attribute new_documentationcenter, and map it to the value in
new_documentationcentersourcevalue.
   /// </remarks>
   public sealed class KnowledgePlugin : IPlugin
   {
       /// <summary>
       /// Execute method that is required by the IPlugin interface.
       /// </summary>
       /// <param name="serviceProvider">The service provider from which you
can obtain the
       /// tracing service, plug-in execution context, organization service,
and more.</param>
       public void Execute(IServiceProvider serviceProvider)
       {
           //Extract the tracing service for use in debugging sandboxed
plug-ins.
           ITracingService tracingService =

(ITracingService)serviceProvider.GetService(typeof(ITracingService));

           // Obtain the execution context from the service provider.
           IPluginExecutionContext context = (IPluginExecutionContext)
               serviceProvider.GetService(typeof(IPluginExecutionContext));

           // The InputParameters collection contains all the data passed in
the message request.
           if (context.InputParameters.Contains("Target") &&
               context.InputParameters["Target"] is Entity)
           {
               // Obtain the target entity from the input parameters.
               Entity entity = (Entity)context.InputParameters["Target"];

               // Verify that the target entity represents knowledgearticle.
               if (entity.LogicalName != "knowledgearticle")
               {
                   tracingService.Trace("KnowledgePlugin: Plugin is
incorrectly called for the entity: " + entity.LogicalName);
                   return;
               }

               //Skip the plugin for RootArticles
               const string isRootArticleAttributeName = "isrootarticle";
```

```
                bool isRootArticle = entity.GetAttributeValue<bool>
(isRootArticleAttributeName);
                if (isRootArticle)
                {
                    tracingService.Trace("KnowledgePlugin: Returning for Root
Article");
                    return;
                }

                try
                {
                    const string sourceValueAttributeName =
"new_documentationcentersourcevalue";
                    const string targetValueAttributeName =
"new_documentationcenter";

                    //Get the source value
                    string sourceValue = entity.GetAttributeValue<string>
(sourceValueAttributeName);
                    if (string.IsNullOrEmpty(sourceValue))
                    {
                        tracingService.Trace("KnowledgePlugin: " +
sourceValueAttributeName + " is not set");
                        return;
                    }

                    // Obtain the organization service reference.
                    IOrganizationServiceFactory serviceFactory =
(IOrganizationServiceFactory)serviceProvider.GetService(typeof(IOrganization
ServiceFactory));
                    IOrganizationService service =
serviceFactory.CreateOrganizationService(context.UserId);

                    // Retrieve the option set metadata of the target field.
                    OptionSetMetadata retrievedOptionSetMetadata =
RetrieveOptionSet(service, entity, targetValueAttributeName,
tracingService);

                    // Check if the source data value is present in the
retrieved target option set metadata.
                    OptionMetadata matchedOptionMetadata =
retrievedOptionSetMetadata?.Options?.First(optionMetadata =>
optionMetadata.Label.UserLocalizedLabel.Label == sourceValue);
                    if (matchedOptionMetadata == null ||
matchedOptionMetadata.Value == null)
                    {
                        tracingService.Trace("KnowledgePlugin: Matching
OptionMetadata is not found");
                        return;
                    }

                    // Map the option set value of the string
new_documentationcentersourcevalue to the target option set
new_documentationcenter.
                    int optionSetValue = (int)matchedOptionMetadata.Value;
```

```
                    entity[targetValueAttributeName] = new
OptionSetValue(optionSetValue);
                    tracingService.Trace("KnowledgePlugin: Successfully set
the value.");
                }
                catch (FaultException<OrganizationServiceFault> ex)
                {
                    throw new InvalidPluginExecutionException("An error
occurred in the KnowledgePlugin plug-in." + ex + "\n InnerException: " +
ex.InnerException);
                }

                catch (Exception ex)
                {
                    tracingService.Trace("Exception in KnowledgePlugin: {0}",
ex);
                    throw ex;
                }
            }
        }

        /// <summary>
        /// Fetch the optionset metadata from the entity metadata
        /// </summary>
        /// <param name="service">Organization Details</param>
        /// <param name="entity">Entity record</param>
        /// <param name="targetValueAttributeName">Optionset Attribute
Name</param>
        /// <param name="tracingService">Tracing Service</param>
        private OptionSetMetadata RetrieveOptionSet(IOrganizationService
service, Entity entity, string targetValueAttributeName, ITracingService
tracingService)
        {
            RetrieveEntityRequest retrieveEntityRequest = new
RetrieveEntityRequest
            {
                LogicalName = entity.LogicalName,
                EntityFilters = EntityFilters.Attributes,
                RetrieveAsIfPublished = true
            };
            RetrieveEntityResponse retrieveEntityResponse =
(RetrieveEntityResponse)service.Execute(retrieveEntityRequest);
            EntityMetadata metadata = retrieveEntityResponse.EntityMetadata;
            PicklistAttributeMetadata picklistMetadata =
metadata.Attributes.FirstOrDefault(attribute =>
string.Equals(attribute.LogicalName, targetValueAttributeName,
StringComparison.OrdinalIgnoreCase)) as PicklistAttributeMetadata;
            return picklistMetadata.OptionSet;
        }
    }
}
```

3. Register the plug-in on `Create` and `Update` SDK messages of the KnowledgeArticle entity in the PreOperation stage. More information: Register a plug-in

See Also

Manage integrated search providers (preview)
View and use insights for search providers (preview)

Overview of collaboration

Article • 05/12/2022

Collaboration features make it easy for agents to find the help they need in Microsoft Teams from within the following apps:

- Dynamics 365 Customer Service admin center
- Dynamics 365 Customer Service Hub
- Dynamics 365 Customer Service workspace
- Your custom apps

Using collaboration features, agents can find experts, chat with peers in Teams, and set meetings. Collaboration helps turn your business into a unified and cohesive customer service center.

Embedded chat using Teams

Agents can start a new chat or link an existing chat to a record in Teams without switching context or leaving the application. Linking all the associated chats to a record can help agents maintain the chats in one place. More information: Configure Teams chat

Customer support swarming using Teams

Customer support swarming helps agents more quickly resolve issues by bringing together the right experts across your business. More information: Configure customer support swarming

Share Dynamics 365 records within Microsoft Teams conversations

Agents can share the record of the chat conversation and let participants view it without navigating away from Teams. They can share any Dynamics 365 record on Teams channels and chat conversations, and share records using search in the app. More information: Share Dynamics 365 records within Microsoft Teams conversations

See also

Configure Teams chat

Use Teams chat

Configure customer support swarming

Use customer support swarming to resolve customer issues

Configure Microsoft Teams chat in Customer Service

Article • 08/04/2023

You can configure the ability for agents to chat in Microsoft Teams from within Customer Service Hub, Customer Service workspace, and your custom apps. Teams chat is also available in other customer engagement apps such as Dynamics 365 Field Service and Dynamics 365 Sales.

> **Note**
>
> Teams chat is already enabled for Customer Service workspace and Customer Service Hub, and you can select other apps that you want to enable it for.

When the feature is enabled for an app, when they work on customer records, agents can start a new chat or connect an existing chat to a record, and thus collaborate efficiently without switching context or leaving the application. Connecting the associated chats to a record can help agents maintain all the chats related to the record in one place. You can also configure an optional introduction note that agents can use to provide further context when collaborating in Teams.

Enable or disable Teams chat

If you're using the Customer Service workspace or Customer Service Hub apps, Teams chat is automatically enabled. If you want to use it in other customer engagement apps, you must manually enable it, and it requires certain permissions to access Teams data. Review the following permissions required section to learn more.

Permissions required

When Teams chat is enabled, the app has the following permissions:

Permission	What the app does with the permission
Chat.ReadWrite.All	Reads user's chats and recent messages to display in chat list.
Directory.Read.All	Reads user's teams and channels display name.
Presence.Read.All	Reads presence information of all users to be displayed on the user avatars in chat list.

Permission	What the app does with the permission
User.Read.All	Reads users' display name and licenses to validate if the suggested participants have a Teams license assigned. This permission is used by the suggested section in the chat list.
User.ReadBasic.All	Reads users' photos.

In order to use Teams chat in multisession environments, users must have the same permissions as those in the **Productivity tools user** role.

Users need read permission for the following entities to access the productivity pane for custom roles:

- App profile
- Application tab template
- Notification field
- Notification template
- Pane tab configuration
- Pane tool configuration
- Productivity pane configuration

Data security and privacy

The following data security and privacy considerations apply for Teams chat functionality in Dynamics 365:

- Dynamics 365 doesn't store any Teams data except for the mapping between the record ID and the connected chat ID. No data from Teams is duplicated in Dynamics 365 unless the user manually adds it to the record notes or tasks.
- The communication between the applications is secured through TLS.
- The integration honors policies that apply both to Teams and Dynamics 365. For example, confidential files shared in a connected chat are only accessible to permitted users. Similarly, a record shared in a Teams chat in Dynamics 365 can only be accessed if the user has permission to view it.
- The app requires certain permissions to start a chat, display suggested contacts, show presence, and so on. For more information, review Permissions required.

Add the Teams collaboration and chat settings page to the sitemap of your app

1. Sign in to Power Apps.
2. Select the environment, and then select **Apps**.
3. Select your custom app, and then select **Edit**.
4. In the **App Designer**, edit the **Sitemap**.
5. To add the Teams **Chat and collaborate** settings page, add a subarea component, and then for the **Type**, select **URL**.
6. Copy the following value and paste it into URL field:
   `/main.aspx?pagetype=control&controlName=MscrmControls.TeamsCollaborationAdmin.TeamsCollaborationAdmin`
7. Save and publish the changes.

Access the Teams settings

> **Note**
>
> Teams settings are enabled by default for the Customer Service workspace and Customer Service Hub apps. If you're using either of these apps, you can skip this section. If you want to enable Teams chat for other apps, follow these steps.

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. On the **Microsoft Teams collaboration and chat** page, turn on the toggle for **Turn on Microsoft Teams chats inside Dynamics 365**.
3. Select one of the following:

   - **Turn on for all Dynamics 365 apps** – Enables Teams chat for all supported Dynamics 365 apps in your organization, including any that you add in the future.

- **Turn on for selected Dynamics 365 apps** – Enables Teams chat for the apps you choose. If your organization already uses Teams, the selection you made previously remains. If you haven't yet set up Teams, it's enabled by default for the Customer Service workspace and Customer Service Hub apps.

4. Save the changes.
   Teams settings are now enabled for Dynamics 365 Customer Service Hub, Customer Service workspace, and your custom apps (and also Field Service and Sales customer engagement apps, if you're using them). You can open a record and verify if you're able to view the chats and channels related to the record.

Add the Teams chat settings page for specific multisession users

If you're using the default profile, once you complete the steps in Add the Teams chat settings page to the sitemap of your app, Teams chat is enabled.

If you want Teams chat to work for specific users, you must enable the feature for your custom profile. For more information about creating custom profiles in App profile manager, see Overview of App profile manager.

To enable Teams chat settings for a custom multisession user, complete the following steps:

1. Create the custom profile from the default profile in App profile manager. More info: Create an app profile

2. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

3. Ensure that the toggle for **Turn on Microsoft Teams chats inside Dynamics 365** is set to **Yes**, and then in **Turn on for specific multisession users**, select **Manage**. The **Agent experiences profiles** page is displayed.

4. Select the profile to open it.

5. On the profile page, you can do the following:

- **Add users** More information: Assign profiles to users
- **Add an entity session template** More information: Manage session templates
- **Enable the inbox** More information: Configure the inbox for agents
- **Enable productivity pane features** More information:
- **Set up channel providers** More information: Overview of productivity tools

Configure the ability to connect chats to Dynamics 365 records

Once you've enabled Teams chats, you can connect the chats to different record types. Standard record types, including case, account, contacts, knowledge article, and email, are available out-of-the-box, or you can add your desired record type.

To configure the ability to connect a chat to a record type:

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. Under **Connect chats to Dynamics 365 records**, select the record type you want to configure.
   If you want to add a record type, see Add record types

3. Select **Save**.

Add record types

To add a record type to connect chats to in Dynamics 365 records:

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

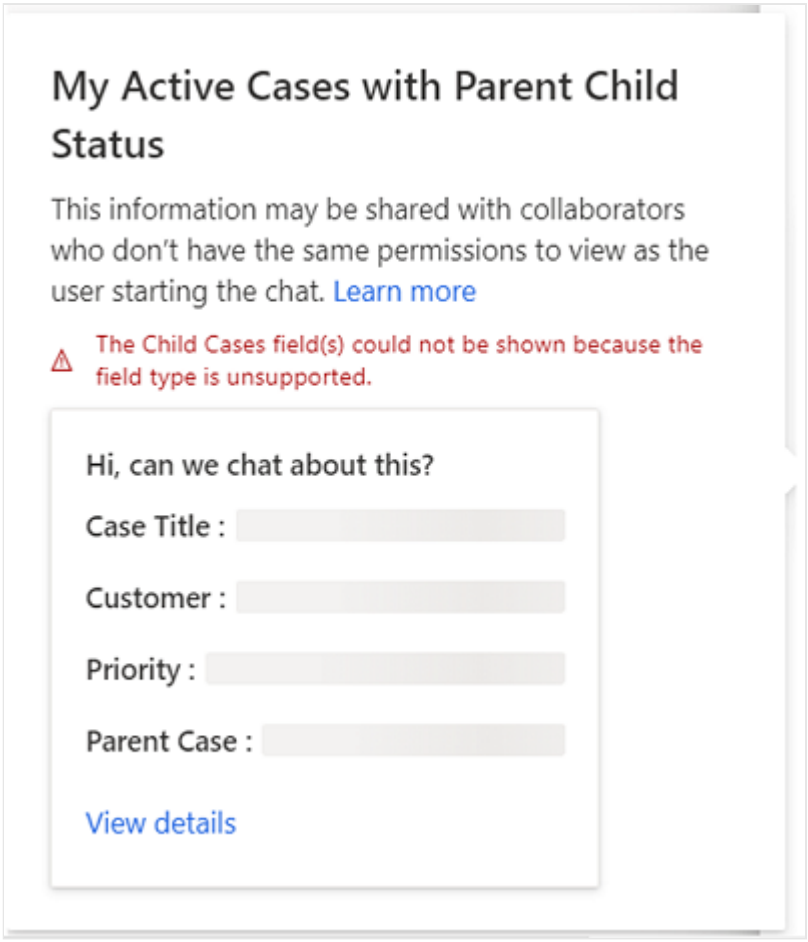
   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. Under **Connect chats to Dynamics 365 records**, select **Add record types**.
3. In the **Allow chats to be connected to this record type** pane, in **Choose record type**, type the name of the record type you want to use.
4. (Optional): If you want to display content for new connected chats, toggle **Include a note** to **On**, and then use the existing views functionality to define the fields that represent the context card or create a custom view in Power Apps. You can choose up to five fields you want to include as a context card.
5. Select **Save**.

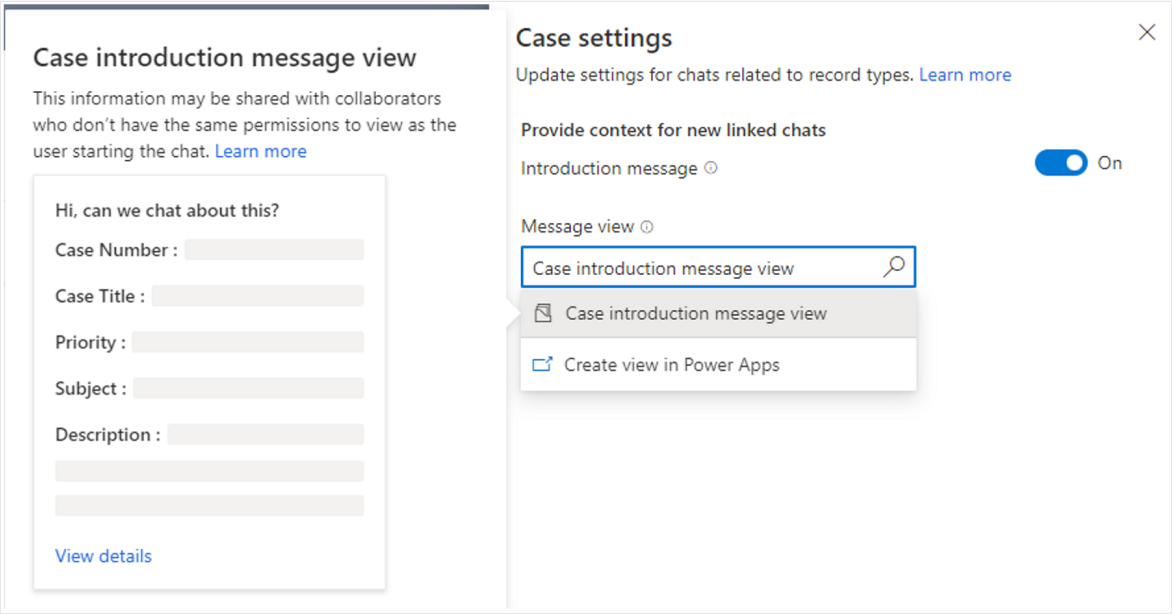
For any view that's selected, keep in mind the following details:

- The first five fields of any view are used as the context card details (in addition to a connection to the record).
- If a field isn't supported, it's skipped and the display includes the first four fields that are supported. You're able to see from the configuration experience that the specific field isn't supported.



- Because the data fields are static, field-level permissions aren't checked for collaborators. This means if the agent has the field-level permissions to view data fields, collaborators can also see those fields.

- If you don't select a view for the Case record type, agents see the default, out-of-box **Case introduction message** view.



- For other out-of-box standard record types, including account, contacts, knowledge article, and email, the default view is the **Quick find** view.

Assign permissions to disconnect chats for specific user and user roles

Agents can create Teams chats directly from Dynamics 365 apps and then connect them to records. They can also connect existing chats to Dynamics 365 records from the Teams embedded chat experience.

> **Note**
>
> The retroactive connect chat experience can only be set up in Dynamics 365 apps.

As an admin, you can control which user or role can disconnect chats that are connected. These user permissions help give you the flexibility to adapt the Teams embedded chat experience to match your business processes.

You can choose from the following options for assigning permissions to agents:

- Assign disconnect chat rights to specific users
- Assign disconnect chat rights for security roles

Assign disconnect chat rights to specific users

You can assign the ability to disconnect chats to record owners or users who connected a chat to a record. For new organizations, by default, these settings are enabled.

- **Record owner can disconnect chats**: When enabled, record owners can disconnect any chats that are connected to a record. As an admin, you can assign this permission at a record-type level (for example, a case, contact, and so forth).
- **Chat connector can disconnect chat**: When enabled, users who connected a chat to the Dynamics 365 record can disconnect that connected chat. This permission can also be assigned at the record level.

To enable or disable user-specific rights to disconnect chats:

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. Select the record type (for example, **Case**), and then in the settings pane, in **Disconnecting chats**, toggle on or off **Record owner can disconnect chats** and/or **Chat connector can disconnect chat**, depending on your preferences.

3. Select **Save**.

Assign disconnect chat rights for security roles

When you assign disconnect chat rights to a security role, all users with that role can disconnect chats that are connected to any record type. Certain role types have disconnect chats rights by default.

The following table details the apps and security roles where the disconnect chats feature is configured:

App	Security role
Admin	System admin
Customer Service apps	CSR manager Customer Service Representative
Omnichannel for Customer Service	OC admin OC supervisor

App	Security role
	OC agent

To edit disconnect chat rights to security roles:

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

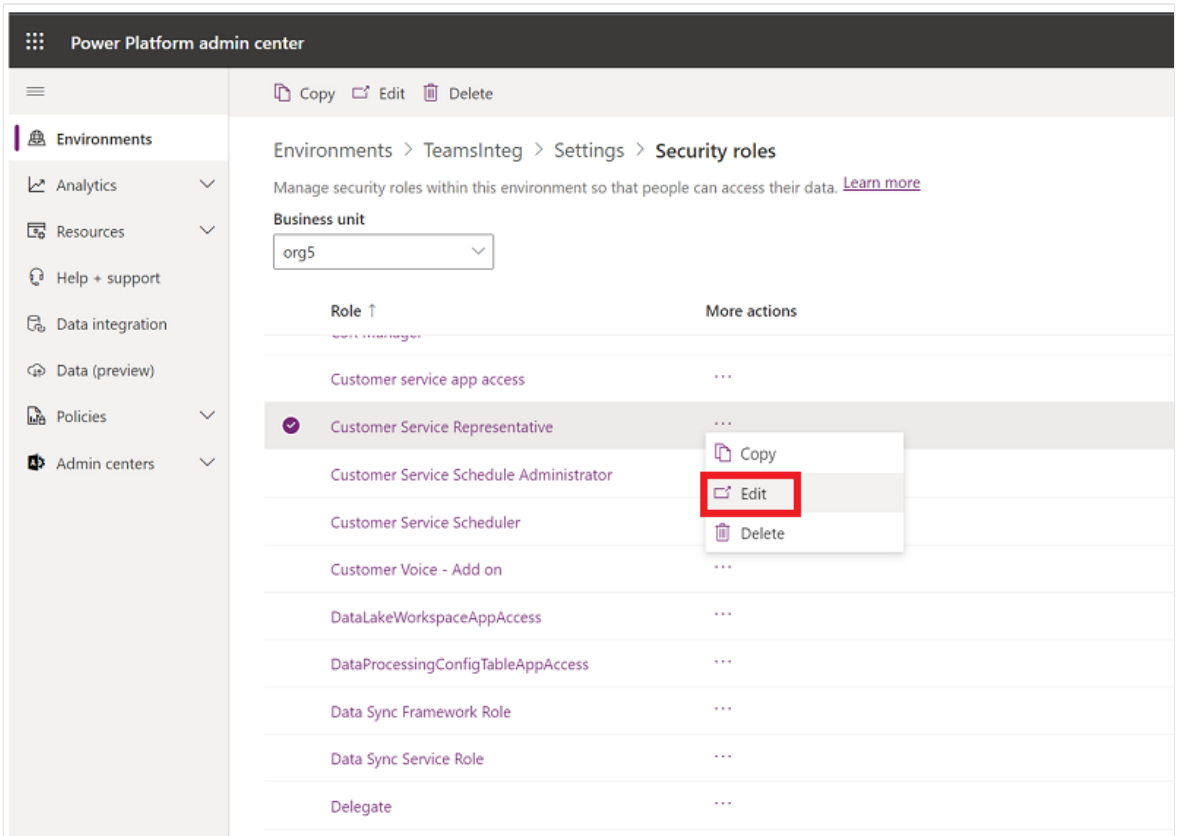
   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

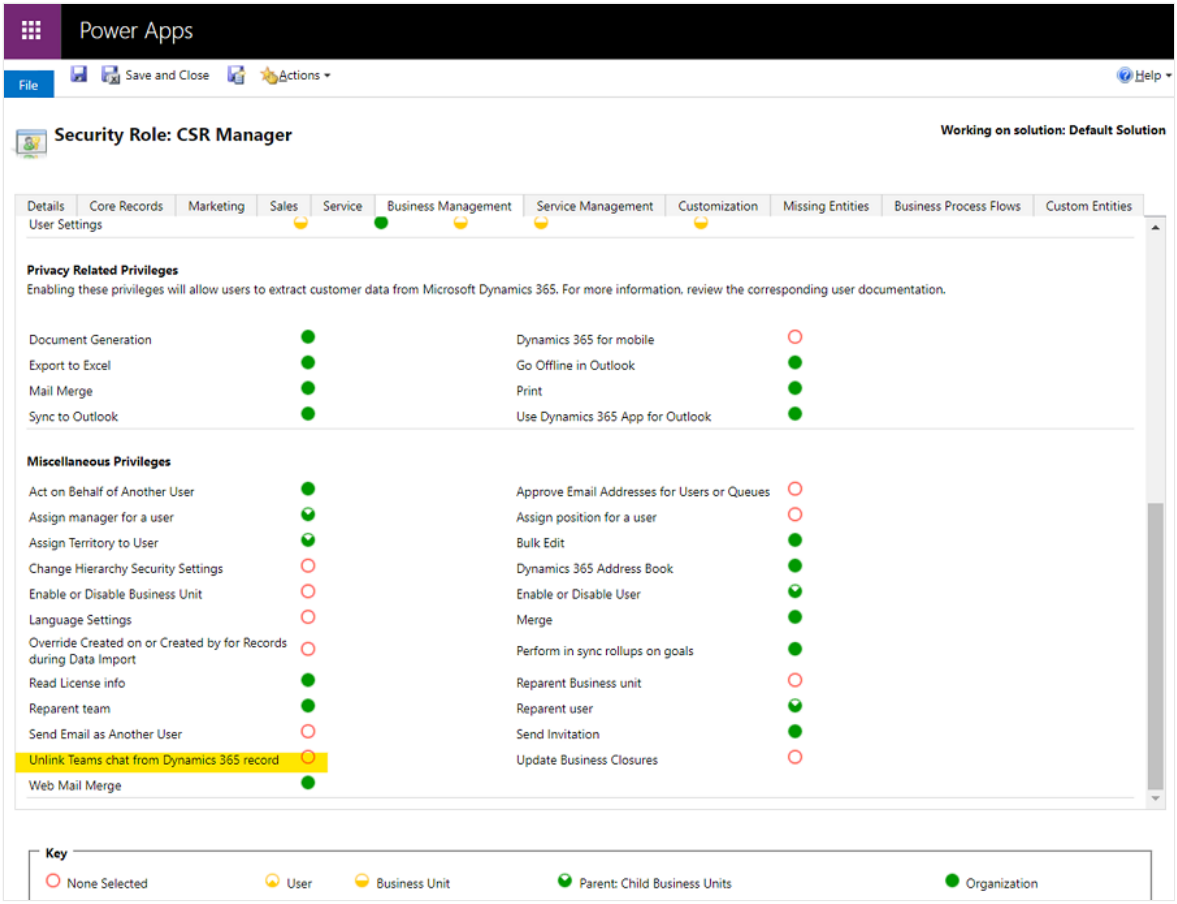
2. On the **Microsoft Teams collaboration and chat** page, scroll down to **More settings**.

3. In **Set who can disconnect chats**, select **Edit in security roles settings**. The Power Platform admin center app is opened.

4. In **Security roles**, select the role that you want to assign the rights to, and then select **Edit**.



5. For the specific security role, go to **Business management** > **Miscellaneous Privileges** > **Disconnect Teams chat from Dynamics 365 record**.



How user rights work together for disconnecting chats

The following table summarizes whether a user can disconnect a connected chat based on the rights assigned to them. You can use the table as a guide for how to use these chat rights to help you configure a secure and effective collaboration experience for your business and users.

Scenario	Scenario	Scenario	Scenario	Scenario	Result
Record is user/team-owned and current user is owner	Current user was most recent to disconnect chat	"Record owner can disconnect chat" toggle is on	"Chat creator can disconnect chat" toggle is on	Global disconnect chat permissions are assigned to user	User can disconnect?
Y	Y/N	N	N	N	N
Y	Y/N	Y	Y/N	Y/N	Y
Y/N	Y	N	N	N	N
Y/N	Y	Y/N	Y	Y/N	Y

Scenario	Scenario	Scenario	Scenario	Scenario	Result
Y/N	Y/N	Y/N	Y/N	Y	Y
N	N	Y	N	N	N
N	Y	N	N	N	N
N	N	N	N	N	N

Configure the ability for users to join chats

As an admin, you can enable users to view and easily join chats that are connected to records they have write access to, even if they weren't originally part of those chats. You can configure the ability for users to join connected chats at a record-type level. This functionality can help you tailor the user experience for your business processes.

> ⓘ **Note**
>
> The join chat feature only works for connected chats and is on by default for the case record type.

The ability for users to join existing chats related to cases is especially useful for the following scenarios:

- **Case transfers**: If an agent has onboarded to a case that was previously handled by another agent, they can join existing connected chats to better understand the context of the case and what steps the previous agent took, and then continue to collaborate with their relevant colleagues.
- **Case escalations**: If a case needs attention from someone with specific knowledge, the subject-matter expert who reviews it can participate in the relevant conversations.

To turn on or off the join chat capability for a record type:

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. On the **Microsoft Teams collaboration and chat** page, in **Connect chats to Dynamics 365 records**, select the specific record type (for example, Case), and then in the settings pane, toggle **Join chat** on or off.

3. Select **Save**.

Keep chat participants informed when fields are updated

You can reduce the overhead on your agents by automatically updating all participants in a chat when an essential field on a connected record is updated. This time-saving feature helps keep everyone informed without manual effort and allows agents to focus on important matters. It also helps experts in the chat be aware of important updates.

Limitations for automatic event updates

This section describes the limitations of the automatic event functionality.

Entities and attribute type limitations

The following entities aren't configurable for automatic event updates:

- Virtual entities
- Entities that don't have the Update SDKMessageFilter defined

The following attribute types aren't supported for automatic event updates:

- PartyList
- Image
- Integer
- File

Inline image limitations

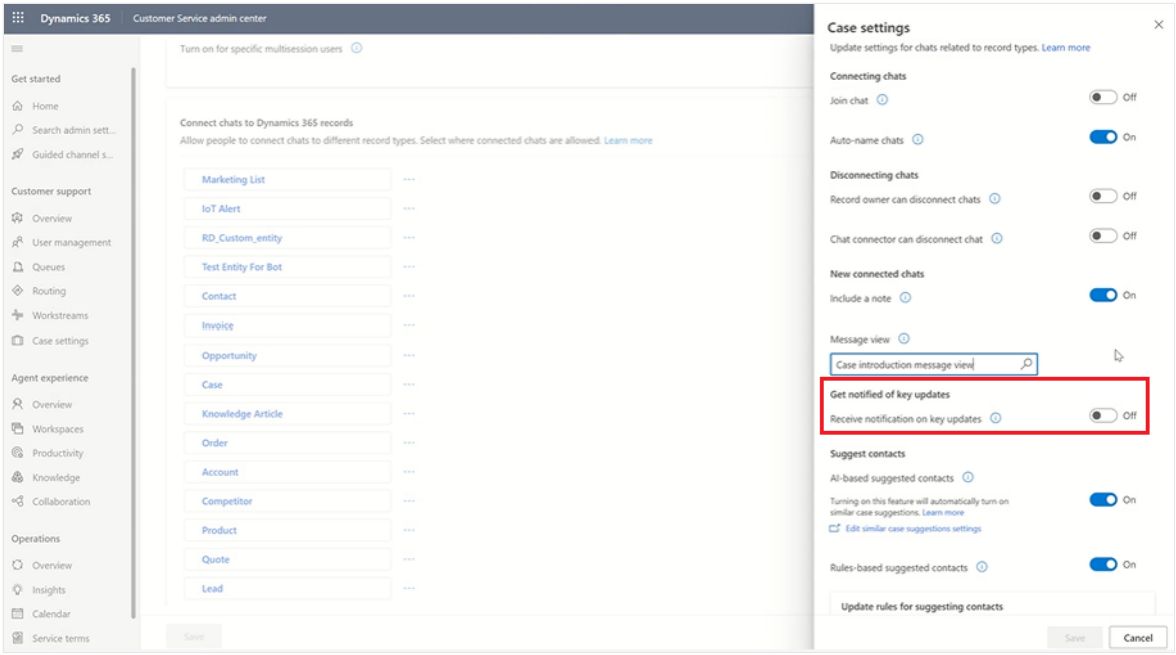
Automatic event updates can't fully render inline images in rich text fields.

Configure chat update when a field is changed

1. In **Customer Service admin center**, select **Collaboration**, and then set the toggle to **On** for **Turn on Microsoft Teams chats inside Dynamics 365**.

2. Next to **Embed chat using Teams**, select **Manage**.

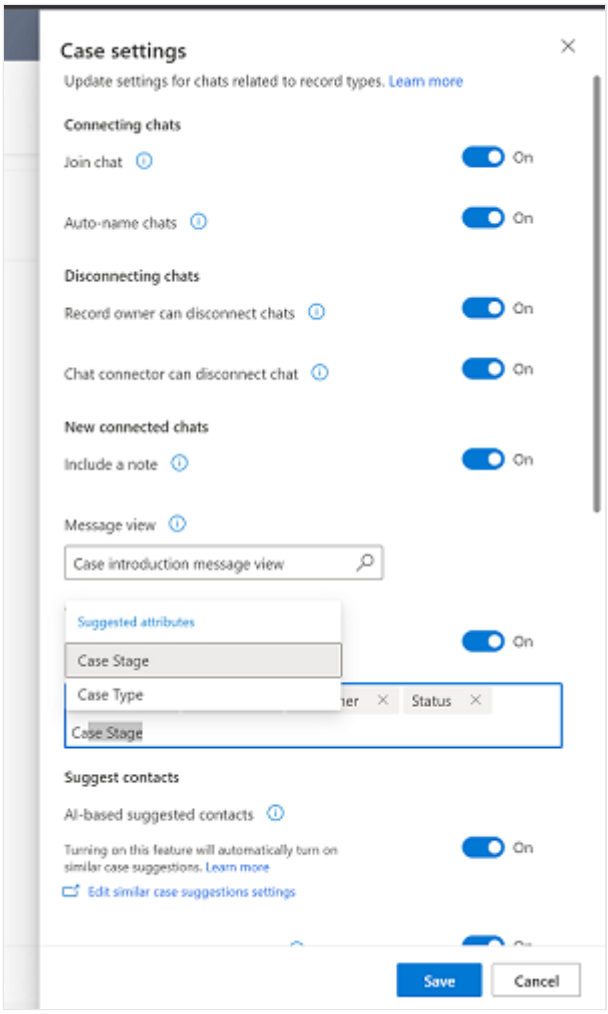
3. On the **Microsoft Teams collaboration and chat** page under **Connect chats to Dynamics 365 records**, select the entity for which you want to enable automatic event updates, or create a new one if the one you want isn't listed. The record settings pane for that entity is opened on the right side of the page.



4. Set the **Receive notification on key updates** toggle to **On**.

5. View the Suggested attributes list by placing your cursor in the field below the toggle, and then select up to five attributes for which you want notifications to be sent.

> **Note**
>
> For the Case entity, the following settings are preconfigured:
>
> - Priority
> - Status
> - Status Reason



6. Save your changes. Automatic notifications will now be sent whenever the attributes you defined for the entities are updated.

Configure the ability for agents to view Teams chats on a connected record's timeline (preview)

You can configure the ability to sync data from Teams to Dataverse so that agents can see chat entries in the timeline when they start a connected chat or connect an existing chat to a record. Agents will see the chat appear as a new activity on the timeline. It will show details about who connected the chat and when they connected, as well as the last person to send a message in the chat and the time they sent it.

Additionally, if the agent assigned to the record changes, the new agent (who may not have been part of the chat originally), can see the chat on the timeline. If the Join chat setting is turned on, the new agent can directly join the chat (and be added as a chat participant) to see the full chat exchange.

Prerequisites

- Only global administrators can configure Teams chat data to sync with Dynamics 365 records.
- For multisession users, you must enable Teams integration in the productivity pane for the app profile assigned to the signed-in user in order for them to be able to select **Open chat** on the timeline.

Enable agents to view Teams chats on a connected record's timeline:

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. Set the toggle to **Yes** for **Turn on Microsoft Teams chats inside Dynamics 365**.

3. Set the toggle to **Yes** for **Sync Teams chats with records (Preview)**.

See also

Use Teams chat
FAQ about Teams chat
Install and set up Microsoft Teams integration
Microsoft Teams integration FAQ
Configure AI suggestions for contacts in Microsoft Teams
Collaborate with AI-suggested agents in Microsoft Teams

FAQ about setting up Teams chat

Article • 08/04/2023

View answers to questions about setting up Teams chat in customer engagement apps.

How do I turn off Teams collaboration?

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. Set the toggle to **No** for **Turn on Microsoft Teams chats inside Dynamics 365**.

3. Save your changes.

How do I turn on Teams collaboration for specific apps?

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. On the **Microsoft Teams collaboration and chat** page, turn on the toggle for **Turn on Microsoft Teams chats inside Dynamics 365**.

3. Select **Turn on for selected Dynamics 365 apps**, and then select the desired apps.

   ⓘ Note

If you're using Teams chat for the first time or previously enabled the setting, Customer Service workspace and Customer Service Hub are preselected and appear in the list of selected apps.

4. Save your changes.

See also

Configure Teams chat
Install and set up Microsoft Teams integration
Use Teams chat

Enable Microsoft Teams meeting integration in Customer Service (preview)

Article • 06/22/2023

> **ⓘ Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

The Microsoft Teams meeting integration feature allows your Dynamics 365 Customer Service agents to quickly access and update records in Microsoft Teams before, during, and after meeting with their customers.

By enabling this feature, you can help give agents and supervisors in your organization a cohesive, seamless experience between Dynamics 365 and Teams. Agents can use the meetings functionality to more efficiently meet their customers' needs.

Prerequisites

To enable Teams integration in Customer Service, the following prerequisites must be met.

- You must have a Dynamics 365 Customer Service license for your organization.
- As an administrator, you must configure the ability for agents in your organization to add and join Teams meetings in the Power Platform admin center app. More

information: Manage feature settings - Power Platform

- Optional: Configure the ability to sync calendars so that any meetings that are created in Dynamics 365 apps will show up on calendars in Microsoft Outlook and Teams. More information: Set up server-side synchronization of email, appointments, contacts, and tasks - Power Platform

Enable Teams meeting integration

Complete the following steps to enable Teams meeting integration.

1. a. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Meeting integration using Teams (preview)**, select **Manage**.

2. Toggle **Show Dynamics 365 data in Teams meetings (preview)** to **Yes**.

3. Select **Save**.

As mentioned in the prerequisites, the following settings are displayed on the page:

- **Sync calendars**: This optional setting ensures that the meetings created in Dynamics 365 are added to Microsoft Outlook and Teams, and show up on agent calendars. More information: Set up server-side synchronization of email, appointments, contacts, and tasks - Power Platform
- **Add and join meetings**: This required setting ensures that an agent can create and join Microsoft Teams meetings directly from Dynamics 365. More information: Manage feature settings - Power Platform

> ⓘ **Note**
>
> The **Record and get insights** setting is only available in Dynamics 365 Sales apps where customers have a premium license.

Configure record side panel

The side panel helps agents quickly view and update details of the related record during a Teams meeting. The side panel displays notes, tasks, and activities associated with the record. As an administrator, you can customize the side panel to meet the needs of your agents. The record side panel supports only Contact, Opportunity, Lead, Account, and Case entities.

> ⓘ **Note**
>
> The record side panel can be customized by customizing the **In Context Form** of a table. The following table lists the supported and unsupported customizations for the side panel.

Supported customizations	Unsupported customizations
Define (add or remove) fields in the header.	Enable or disable tabs. Rearrange tabs.
Define (add or remove) fields in the Key Details section. Change a field label. Set a field requirement (for example, read-only).	Enable or disable tabs. Rearrange tabs. Add custom tabs or sections. Add sections other than Key Details, Contacts, Notes, Tasks, Collaboration, and Recent Opportunities. Add a web resource. Add a subgrid. Change the format or layout for headers, tabs, sections, or fields. Change certain properties for headers, tabs, sections, or fields. For example, the **available on phone** property can't be changed.

To customize the record side panel:

1. Sign in to Power Apps.
2. Select the environment, and then select **Dataverse** > **Tables**.
3. In the upper-right corner, select the dropdown list, and then select **All**.
4. Search for the required table and then select it to open it.
5. Go to the **Forms** tab and select the **In Context Form** form.
6. Edit the form to manage the fields that appear in the side panel. By default, all the fields in the form are editable. If you want to set a field as read-only, select the field, and then enable the **Read-only** property.

Enable Teams meetings to be added to your Outlook calendar

To see appointments in Teams, enable mailbox record integration by following these steps.

1. In Dynamics 365, go to **Settings** > **Email Configuration** > **Mailboxes**.
2. Select the mailbox record, and then select **EDIT** on the ribbon.
3. For **Appointments, Contact, and Tasks**, select **Server-Side Synchronization**.
4. Select the mailbox record, and then select **APPROVE EMAIL** on the ribbon.
5. Select the mailbox record again, and then select **TEST & ENABLE MAILBOX** on the ribbon.
6. Refresh the record until you see **Success** for the status. Then you can create an appointment with a Teams meeting and it'll be added to the Teams calendar.

See also

Use Microsoft Teams Meeting integration in Customer Service

Configure AI suggestions for contacts in Microsoft Teams

Article • 09/20/2022

Agents can collaborate with other contacts directly through Microsoft Teams to quickly resolve customer issues. As an administrator, you can enable the Microsoft Teams collaboration feature to help them find the right contacts.

This feature uses the AI capability to automatically suggest contacts in real-time, based on the currently open active case or support conversation when agents explore contacts in the embedded chat experience.

> **Note**
>
> Through Teams, agents can connect and engage with customers also if Omnichannel for Customer Service is enabled.

How AI-suggested contacts works

The suggestions capability uses AI to recommend contacts who might be able to help agents resolve an issue described in an active case or a support based on similar cases those contacts have worked on. It uses similar case suggestions to find similar cases, and then identifies the most logical contacts based on a few factors related to the experience and proficiency of the contacts in resolving those similar cases, including the following:

- The number of similar cases that the suggested contacts have resolved. A higher number of similar cases that the suggested contacts have resolved might indicate that they have more experience in resolving the issue described in the cases or conversations.
- The similarity level of the similar cases to the active case. A higher similarity of the cases means that the similar cases the contacts have resolved are more related to the active case or conversation that agents are currently working on.
- How recently the suggested contacts have resolved the similar cases. More recent experience might indicate the contact has more current knowledge about resolving the issue described in the cases or conversations.

- The average time that the suggested contacts use to resolve similar cases. Less time spent in resolving similar cases compared to others might indicate that the contact is more familiar than others about how to resolve the issue type.

AI-suggested contacts works with a set of out-of-the-box AI models, so that admins can enable the feature by setting the toggle without the need for extra model training.

For more information about similar case suggestions that impact the AI-suggested contacts, see How AI suggestions for similar cases and knowledge articles work.

Regional availability and supported languages

The AI suggestions are supported in geographical locations that AI suggestions for similar cases supports. More information: Regional availability and service limits for Customer Service

The AI suggestions feature is supported in the following languages:

- Dutch
- English
- French
- German
- Italian
- Japanese
- Spanish

Prerequisites

- AI suggestions for similar cases must be enabled. More information: Enable AI suggestions for similar cases
- Tenant permissions to enable the enhanced integration with Microsoft Teams feature.

Enable collaboration with Microsoft Teams

To enable collaboration with Microsoft Teams and chat

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

a. In the site map, in **Agent experience**, select **Collaboration**.

b. In **Embedded chat using Teams**, select **Manage**.

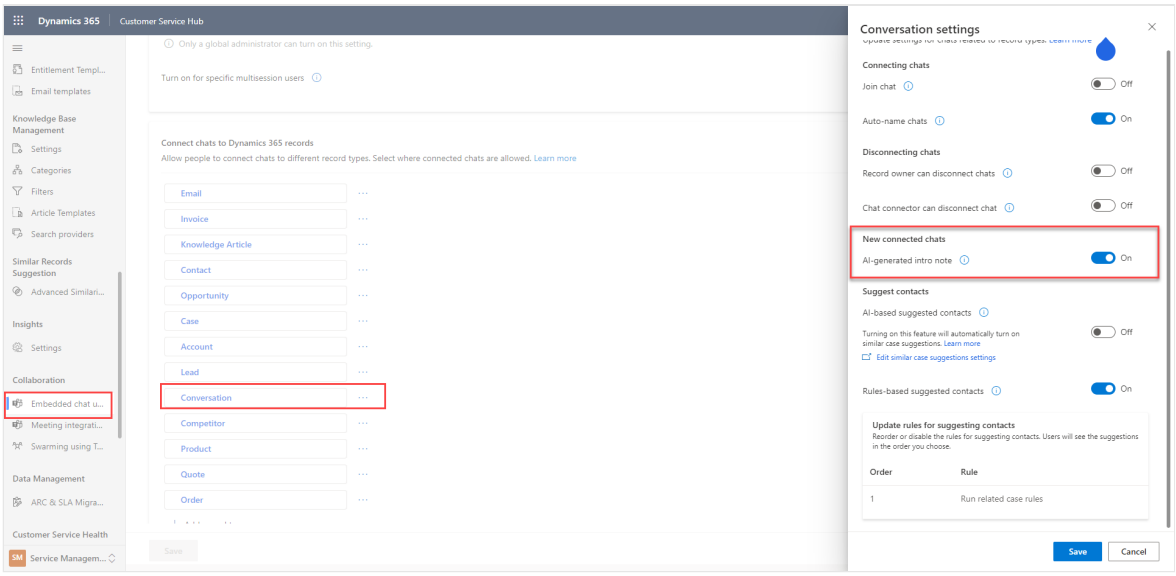
2. On the **Microsoft Teams collaboration and chat**, set the toggle for **Turn on the linking of Dynamics 365 records to Microsoft Teams channels** to **Yes**.

3. To get suggested contacts for active cases or supported conversations, perform the following steps:

   a. In **Connect chat to Dynamics 365 records**, select **Case** or **Conversation**. Based on your selection, the **Case settings** or **Conversation settings** pane appears on the right.

   b. In **Suggest contacts**, turn on the toggle for **AI-based suggested contacts**.

   It takes 24 hours for the data to be preprocessed for the first time use.



4. Optionally, set the toggle for **Turn on Enhanced Microsoft Teams Integration** to **Yes**. This setting lets agents pin records and views to a Teams channel directly from Dynamics 365 and also suggests agents who worked on similar cases.

5. Optionally, set the toggle for **Enable Confidential Labels** to **Yes** to create private Teams messages and add sensitivity or confidentiality labels in enhanced Microsoft Teams integration.

See also

Collaborate with AI-suggested contacts in Microsoft Teams chat
Overview of Customer Service workspace

Configure rules-based suggestions for contacts in Microsoft Teams

Article • 07/22/2023

Agents can collaborate with other contacts directly through Microsoft Teams to quickly resolve customer issues. As an administrator, you can enable rules-based suggested contacts that are displayed when an agent starts a new connected chat. This feature can help agents in your organization to quickly find the right coworkers to collaborate with.

A maximum of 10 rules are supported per record type.

Turn on the suggested contacts for a record type

> **Note**
>
> For the case record type, there are two types of contact suggestions: AI and rules-based. Most record types enabled for connected chats only have rules-based suggestions. For more information about configuring AI-suggested contacts in Teams, see **Configure AI suggestions for contacts in Microsoft Teams**

To enable collaboration with Microsoft Teams and chat

1. In Dynamics 365, go to one of the apps and perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. On the **Microsoft Teams collaboration and chat** page, set the toggle for **Turn on the linking of Dynamics 365 records to Microsoft Teams channels** to **Yes**.

3. To get suggested contacts for any record type, perform the following steps:

   a. In **Connect chat to Dynamics 365 records**, select record type for which you want to enable rules-based suggested contacts. Based on your selection, the relative settings pane appears on the right.

b. In **Suggest contacts**, turn on the toggle for **Rules-based suggested contacts**.

4. In the **Update rules for suggesting contacts** section, reorder or disable the rules for suggesting contacts. Users see the suggestions in the order you choose.

   - To reorder the rules, hover over a rule, and then select the up or down arrow to move the rules up or down, respectively.
   - To disable a rule, hover over a rule, and then select . When the rule is disabled, a check mark is displayed when you hover over the disabled rule.
   - To delete a rule, hover over the rule, and then select . Deleting a rule removes it entirely so it won't influence suggested contacts in the future.

5. Select **Save**.

Add a new rule

1. On the settings pane, in the **Update rules for suggesting contacts** section, select **Add new rule**. The **Add rule** pane is displayed for the record type you selected.

2. Type a **Rule name** for the rule. The name you enter displays on the contact, and also appears in the rule list.

3. Select from the following **Rule type** options:

   - **Relational**: Suggest a user who has a relationship with the linked record type or one of its related records. In the rule settings section, the dropdown allows you to select a user directly on the record type for which you're creating a rule or an entity that's related to it. You can select up to 10 related entities, each one being associated with the previous selection. Once you've selected a user, either on the record type or related entity/entities, you can save the rule.
   - **Custom**: You can use your own custom logic with a record type, and then apply it.

4. Select **Save**.

Use a custom action

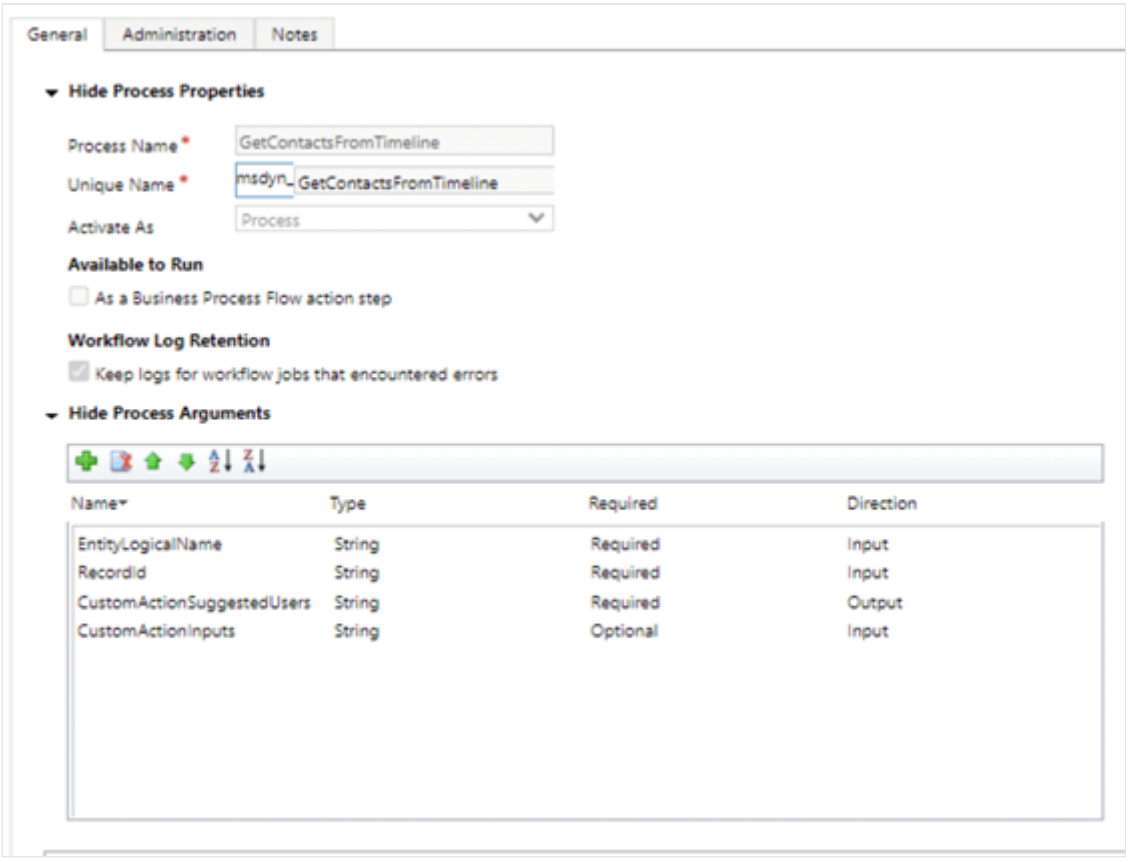
> ⓘ **Important**

We recommend that you have previous experience working with custom actions before configuring them for rules-based suggestions. More information: **Create or edit custom actions from a workflow**

You can call a custom action to handle advanced scenarios. The suggested contacts identifier passes along the ID and entity type as arguments, and expects the custom action to return users. In the rule settings section, type the name of an existing action.

To use the custom rule type, you must have an existing custom action that has the following arguments:

Name	Type	Required	Direction
EntityLogicalName	String	Required	Input
Recordid	String	Required	Input
CustomActionSuggestedUsers	String	Required	Output
CustomActionInputs	String	Optional	Input



The output, CustomActionSuggestedUsers, is a list of objects that follow this contract:

```
public class ContactSuggestionCustomActionOutput
  {
    public Guid AADUserId { get; set; }
    public Guid systemUserId { get; set; }
    public string description { get; set; }

    public ContactSuggestionCustomActionOutput(Guid AADUserId, Guid
systemUserId, string description)
    {
        this.AADUserId = AADUserId;
        this.systemUserId = systemUserId;
        this.description = description;
    }
  }
```

Language localization

To ensure that the user's language is localized, make sure they have Read privileges for the following entities:

- msdyn_contactsuggestionrule
- msdyn_contactsuggestionruleset

See also

Configure Microsoft Teams chat in Customer Service
Use Teams chat in Customer Service

Set up auto-summarization for conversations

Article • 04/05/2023

Agents can collaborate with other agents and contacts directly while they're working in Dynamics 365 Customer Service. To help agents easily recap an ongoing customer interaction, turn on auto-summarization for conversations. Agents can generate a conversation summary when they either transfer a conversation, add a user to consult, or start a linked Teams chat. The summary quickly provides context and relays any steps they've already taken.

Components of an auto-summarize conversations

The conversation summary feature uses an AI natural language model to summarize a transcript of an active conversation. Summaries are limited to the first 7,000 characters of a transcript.

A summary includes the following components:

- **Issue description**: Summarizes the key customer problems to solve in a conversation. The model needs at least three customer messages to generate the issue description.
- **Resolution tried**: Summarizes any troubleshooting steps or possible solutions that agents have tried. If the model can't identify a resolution from the transcript, this section is blank. If the case is resolved or the conversation ends, the application displays this label as **Resolution**.

Regional availability and supported languages

The auto-summarization of conversations is available in United States and Europe.

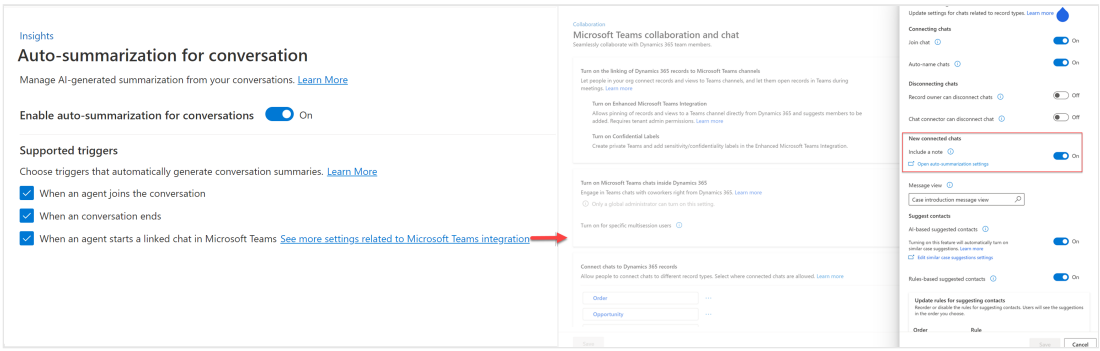
This feature is supported only in English.

Prerequisites

Tenant level access to enable the enhanced integration with Microsoft Teams feature.

Turn on auto-summarization for conversations

1. In Customer Service admin center, select **Operations** > **Insights**.
2. In **Insights**, select **Manage** next to **Auto-summarization for conversations**.
3. Turn on **Enable auto-summarization for conversations**. When you enable this option, agents can see **AI summary** in the communication panel of a session.
4. The **Supported triggers** section is displayed. Select the following options to define when you want the conversations to be summarized:
    - **When an agent joins the conversation**: To display the conversation summary when an agent has joined the conversation. This is applicable to conversations escalated to a human agent from a bot, transferred conversations, or when the agent invites a collaborator.
    - **When the conversation ends**: To display the summary when the conversation ends.
    - **When an agent starts a linked chat in Microsoft Teams**: To display the summary when the agent starts a linked Teams chat. Alternatively, you can select the **See more settings related to Microsoft Teams integration** link and turn on **Include a note** in the **Case settings** flyout of **Microsoft Teams collaboration and chat**.



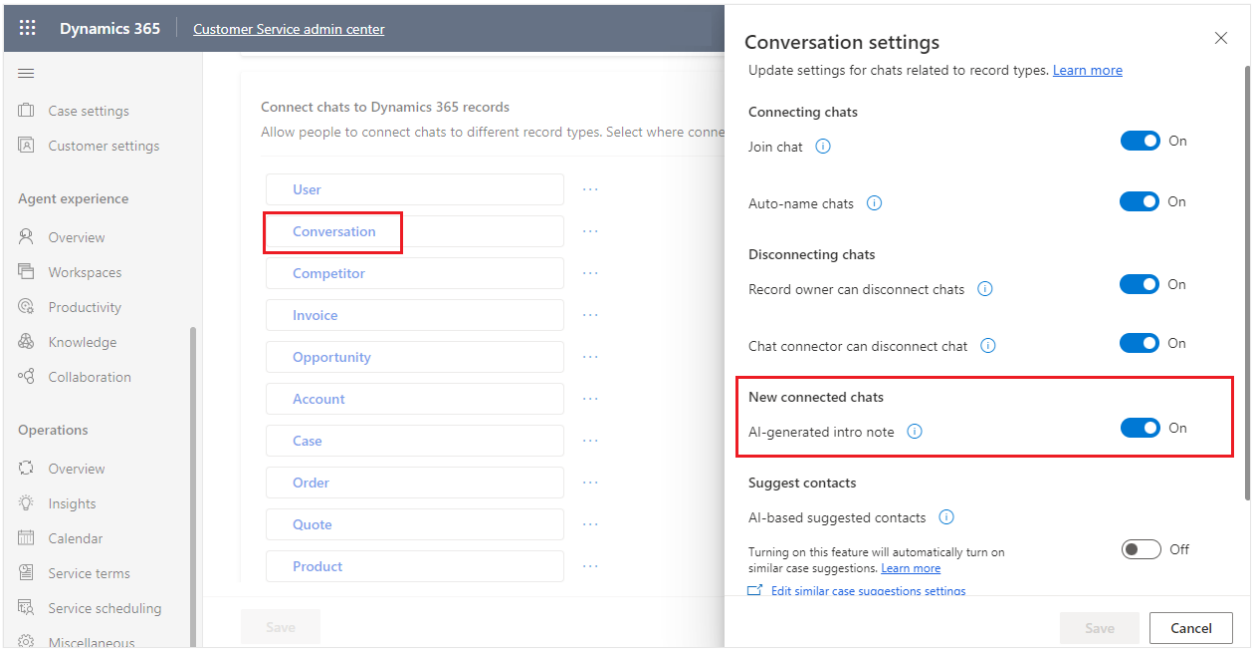
Turn on the auto-summarization of Microsoft Teams conversations

You can also enable this feature from the Customer Service Hub app. Perform the following steps to enable aut-generated summary for Microsoft Teams chats:

1. In the site map, select **Service Management**.
2. In **Collaboration**, select **Embedded chat using Teams**.

3. In **Connect chats to Dynamics 365 records**, select **Conversation**.

4. In **Conversation settings**, in **New connected chats**, turn on **AI-generated intro note**.



See also

View and share an AI-generated conversation summary in Teams

Overview of Customer Service workspace

Regional availability and service limits for Customer Service

Set up Join a Teams call for agent conversations with customers (preview)

Article • 10/02/2023

> **ⓘ Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Join a Teams call is a new feature that helps agents in your organization give their customers a more personalized support experience by using Teams to share their screen, cobrowse, and connect through video. Customers don't need to have a Teams license or previous experience using Teams.

Prerequisites

Ensure that the following prerequisites are met:

- Agents in your organization must be able to access and use Teams.
- Agents must be able to access the productivity pane to see the Join a Teams call app. More information: Assign templates and enable the productivity pane and channels
- If you want agents to be able to invite their customers to Teams meetings via email, their email must be configured for outbound email.

Set up Join a Teams call for agents

1. In Power Platform admin center, go to **Settings** > **Product** > **Collaboration**, and then toggle on **End users can join Teams meetings from appointments**.
2. In Customer Service admin center, go to **Agent experience** > **Collaboration**.
3. In **Join a Teams call**, select **Manage**.
4. On the **Join a Teams call** page, turn on the toggle for **Join a Teams call**.

5. If you want to enable the Join a Teams call feature for nondefault agent profiles, you must manually enable them. Select **Manage** next to **Turn on for specific multisession users.** More information: Add the Teams chat setting page for specific multisession users

6. Save the changes. The Join a Teams call feature is now enabled for Customer Service workspace.

See also

Configure Teams
Use Join a Teams call
Configure Teams chat in Customer Service

Configure customer support swarming for complex cases

Article • 05/19/2023

> **ⓘ Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

Customer support swarming is a way to quickly bring together experts across your business to help agents solve issues. As an administrator, you can enable your agents and subject matter experts to "swarm" together to resolve complex cases.

Customer support swarming is particularly useful when agents need to take the following actions:

- Collaborate with experts across your organization to get help on complex cases.
- Use an expert finder to locate experts with the right skills to help.

Some of the key benefits of customer support swarming include:

- Improved first contact resolution
- Reduced average time to resolution
- Accelerated on-the-job training for agents

Swarming features are available in Dynamics 365 Customer Service workspace, Customer Service Hub, and custom apps. Swarming works with either the Microsoft Teams desktop or web apps.

Prerequisites

The following licenses are required for the swarm feature.

- To configure the customer support swarming feature, you must have the Customer Service System Administrator role.
- Agents who use the swarm feature must have both a Dynamics 365 Customer Service Enterprise license and Microsoft Teams license.
- Experts who join a swarm must have a Teams license.

Guided setup experience for customer support swarming

If you're new to using customer support swarming, you can use the step-by-step guided swarm setup wizard to help walk you quickly through the configuration using default settings.

If this is your first time accessing the guided setup, follow these steps:

1. In Customer Service admin center, go to the sitemap, and then in **Agent experience**, select **Collaboration**.
2. On the **Collaboration** page, on the top banner, select **Get started**. The swarm set-up page is displayed.
3. Follow the wizard to complete the setup.

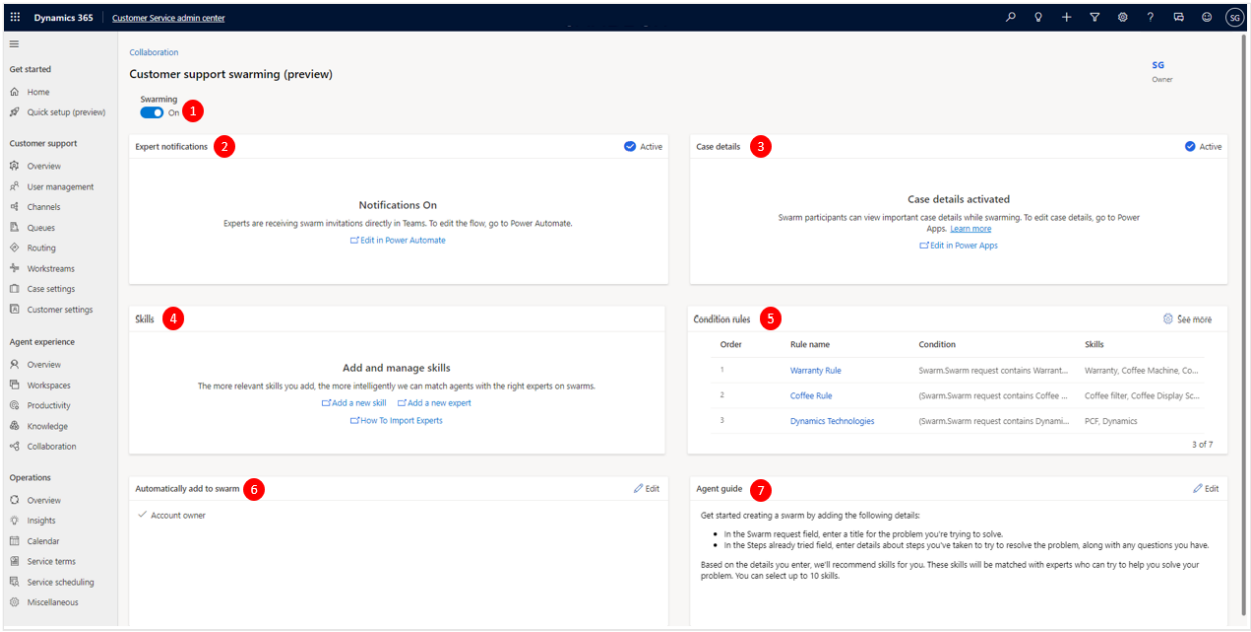
You can alternatively choose to opt out of the wizard by selecting **Skip setup**.

If you've completed at least one setup, or previously chose to skip the setup, you can launch the guided experience again using the following steps:

1. On the Collaboration page, next to Customer support swarming (preview), select **Manage**. The Customer support swarming (preview) page is displayed.
2. On the right side of the page, select **Manage setups**. The Swarming setups page is displayed.
3. Select **Start new**, and then follow the wizard to complete the setup.

Overview of the customer support swarming page

Use the following image and legend to understand the layout of the customer support swarming page.



Legend

Number	Functionality	Description
1	Swarming toggle	Turns on the swarming feature.
2	Expert notifications	The Power Automate flow that turns on and manages swarm invitations that are sent to experts.
3	Case details	Add out-of-box case fields. Administrators can configure which case fields show on the form.
4	Add and manage skills	Add relevant skills to help match experts for swarming. Onboard coworkers outside of your team as experts (through mapping or bulk-importing) so they can be recommended for swarms.
5	Condition rules	Conditions that define which skills to attach to swarms. The attached skills are then used to find and invite experts to swarms.
6	Automatically add to swarm	Team contacts automatically added to swarms because of their relationship to the customer or the agent assigned to the issue.
7	Agent guide	Administrator-provided guidance to help agents know what content to include to begin a swarm or manage the swarm process.

To configure customer support swarming, you must have administrator privileges and complete the following steps.

1. Turn on the Embedded chat using Teams feature for Microsoft Teams desktop or web apps.
2. Activate case details on swarms
3. Turn on the swarm expert notification flow in Power Automate

Turn on Embedded chat using Teams

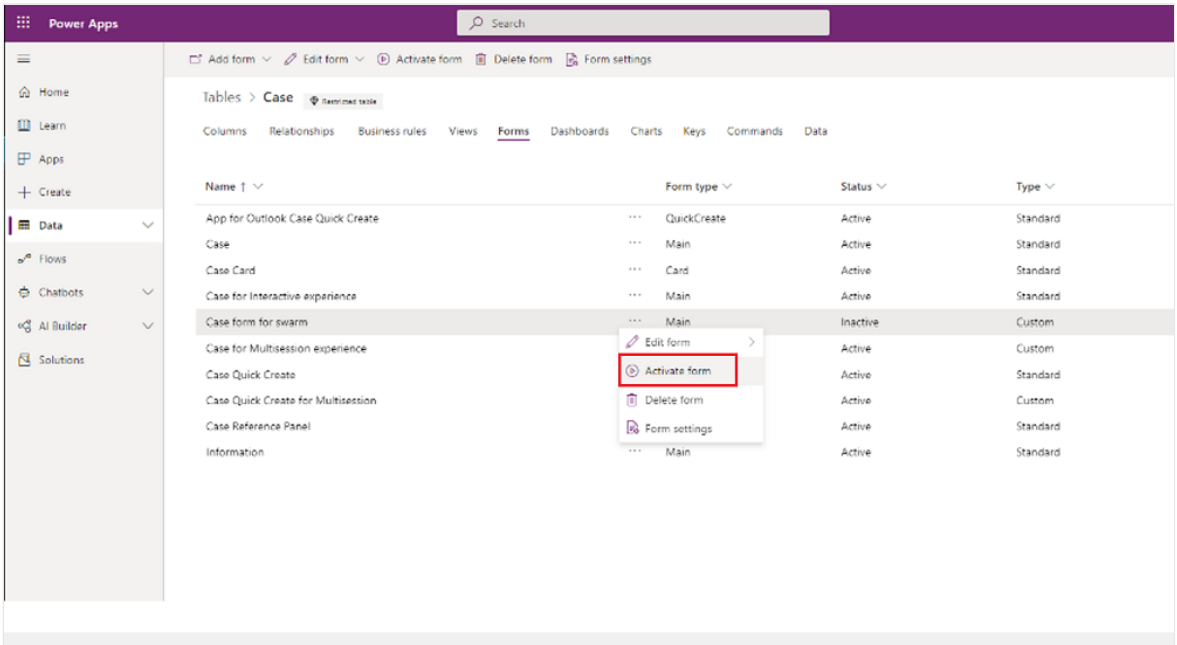
You can set up Embedded chat using Teams in the Customer Service admin center. The settings you configure for embedded chat using Teams in the Customer Service admin center app are carried over to the Customer Service Hub app.

1. Select **Collaboration** in the site map. The **Collaboration** page is displayed.
2. Next to **Embedded chat using Teams**, select **Manage**.
3. Set the **Turn on Microsoft Teams chats inside Dynamics 365** toggle to **On**.

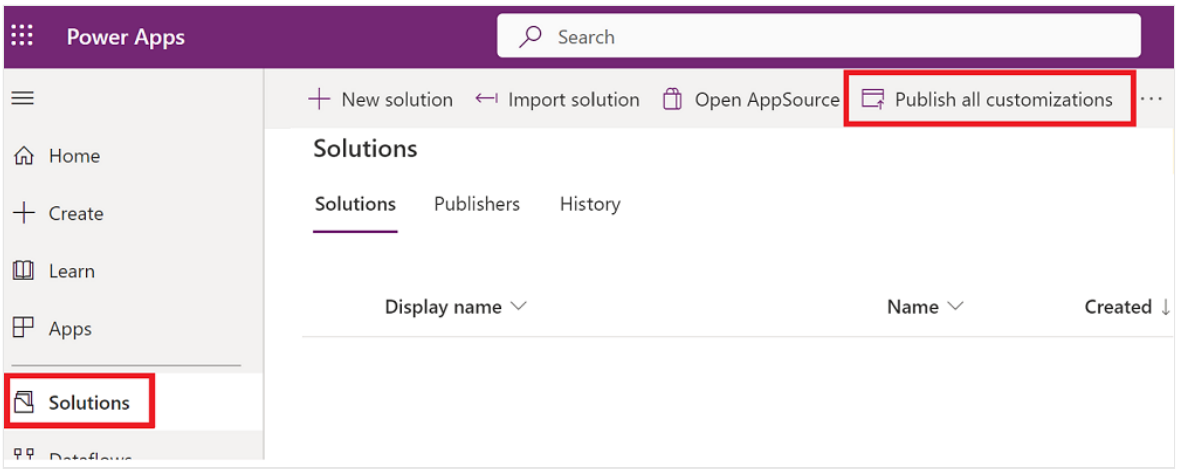
Activate case details on swarms

If you haven't already activated the case details for the swarm form, perform the following steps.

1. Select **Collaboration** in the site map. The **Collaboration** page is displayed.
2. Next to **Customer support swarming (preview)**, select **Manage**. The **Customer support swarming (preview)** page is displayed.
3. On the **Case details** card, select **Activate case form for swarming**.
4. Select the **Case form for swarming** form, select the ellipsis, and then select **Activate form**. The form becomes active.



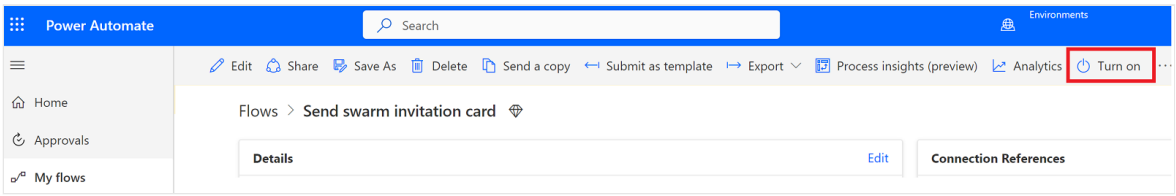
5. Go to the **Solutions** tab and select **Publish all customizations**.



Turn on the swarm expert notification flow in Power Automate

To ensure that swarm experts receive invitations directly in Teams, turn on the Microsoft Power Automate flow for swarm expert notifications. Perform the following steps.

1. On the **Customer support swarming (preview)** configuration page, go to the **Expert notifications** card.
2. Select the **Edit in Power Automate** link. The **Case form for swarming** page is displayed.
3. After completing the edits, select **Save**.
4. Return to the main form and select **Turn on** to activate the flow.



> **Note**
>
> You can configure various administration sections without turning on swarming. This is useful in ensuring you've fully configured the feature before enabling the feature. Once enabled, it appears on the agent's desktop, which might cause issues if it's not fully functional.

Edit case details

When an agent creates a swarm, the system includes fields from the related case and account to provide more context for the swarm participants who join.

You can configure which case fields to include as part of the swarm form. Out of box, the following fields are included:

- Account
  - Customer Name
  - Email
  - Phone number
- Case
  - Case title
  - Case number
  - Subject
  - Customer priority
  - Status
  - Product
  - Case description

To configure case details, perform the following steps:

1. On the **Customer support swarming (preview)** configuration page, go to the **Case details** card.
2. Select **Edit in Power Apps**.
3. Select **Case form for swarming** from the list, and then select **Edit** either from the command bar or by selecting the ellipsis next to the form.
4. Edit the form. When finished, select **Back**.
5. Select the **Solutions** from the site map, and then select **Publish all customizations**.

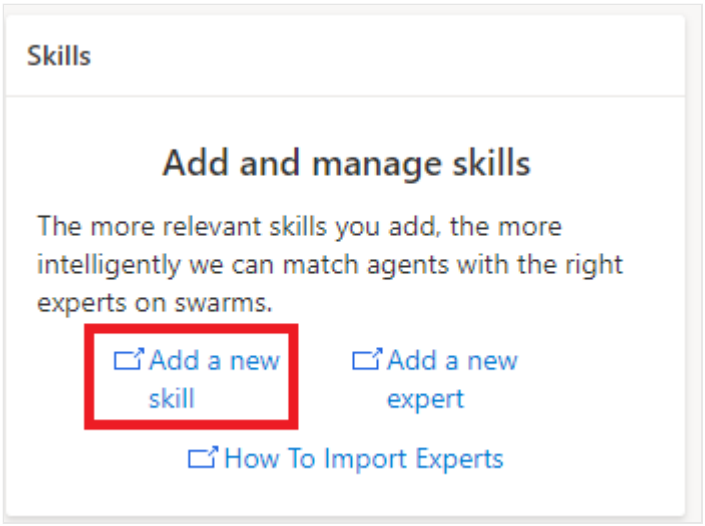
Add and manage skills

If your organization is already using skills in resource scheduling or Omnichannel for Customer Service, you can reuse the skills to define swarm rules.

If you haven't already configured skills, then complete the following steps.

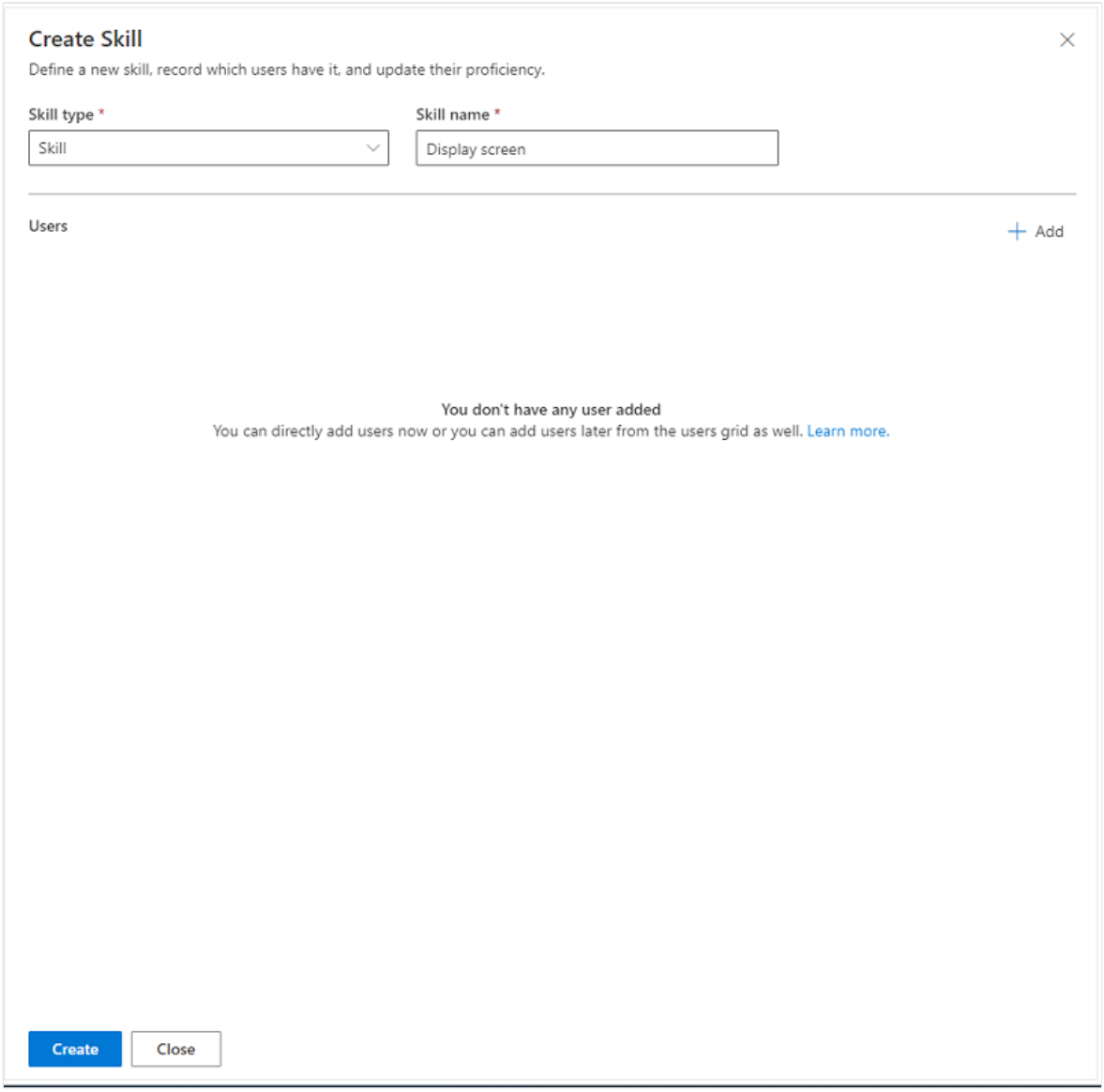
1. On the **Customer support swarming (preview)** configuration page, go to the **Skills** contact card.

2. Select the **Add a new skill** link.



3. On the **Skills** page, select **Create**.

4. On the **Create Skill** page, select the **Skill type**, and then in the **Skill name** field, type a name for the skill.



5. Select **Create**.

Attach the new skill to an expert

To use the new skill in customer support swarming, you must attach it to a user.

1. On the **Edit Skill** page, in the **Users** section, select **+ Add**.
2. On the **Add Users** page, select the user type from the dropdown list.
3. Select the name of the user you want to add, and then select **Add selected users**.
4. Select **Save**.

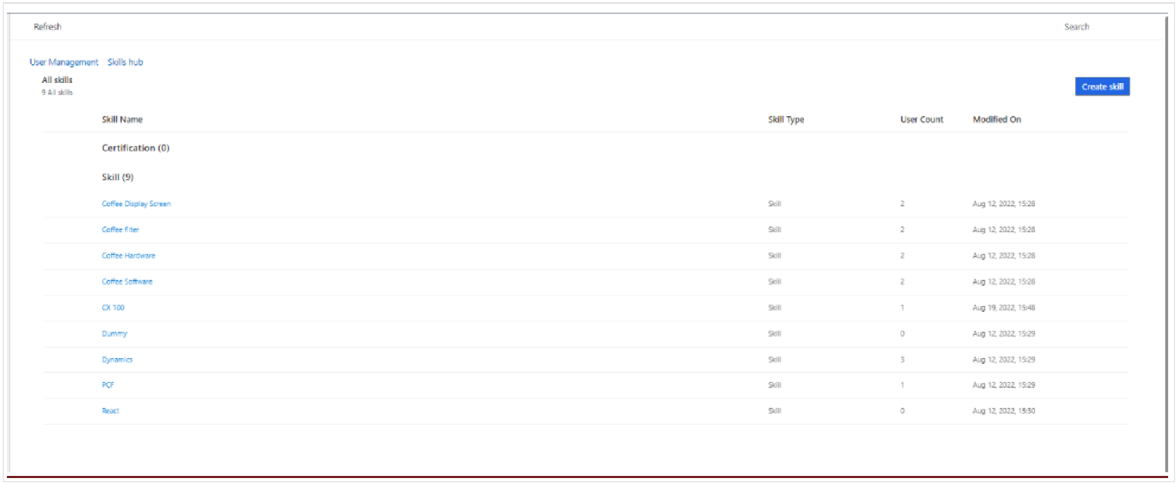
Bulk import skills (optional)

If the skills you want to use to match experts to swarms are stored in another system outside of Dataverse, you can import them using Excel using the following steps.

1. In the Customer Service admin center site map, select **User management**. The **User management** page is displayed.

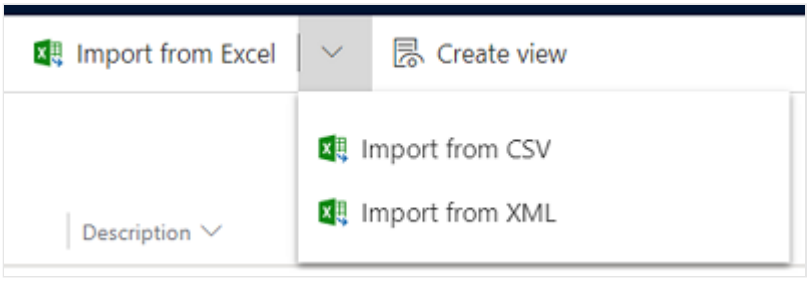
2. Next to **Skills**, select **Manage**.

3. On the skills page, select the list of skills, and then select **Export to Excel**.



4. Add the needed skills to the spreadsheet, and then save it.

5. Import it using the **Import from Excel** wizard.

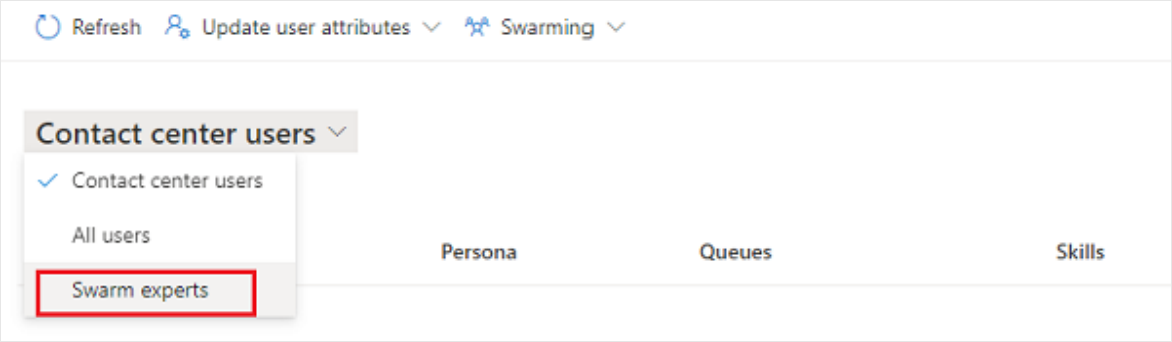


Add experts

If your organization is already using bookable resources in resource scheduling or omnichannel, you can reuse the resources to define your swarm rules.

If you haven't already configured experts, then perform the following steps.

1. On the **Customer support swarming (preview)** configuration page, go to the **Skills** card and select **Add a new expert**.
2. On the **Contact center users** page, select **Swarm experts** from the dropdown menu.



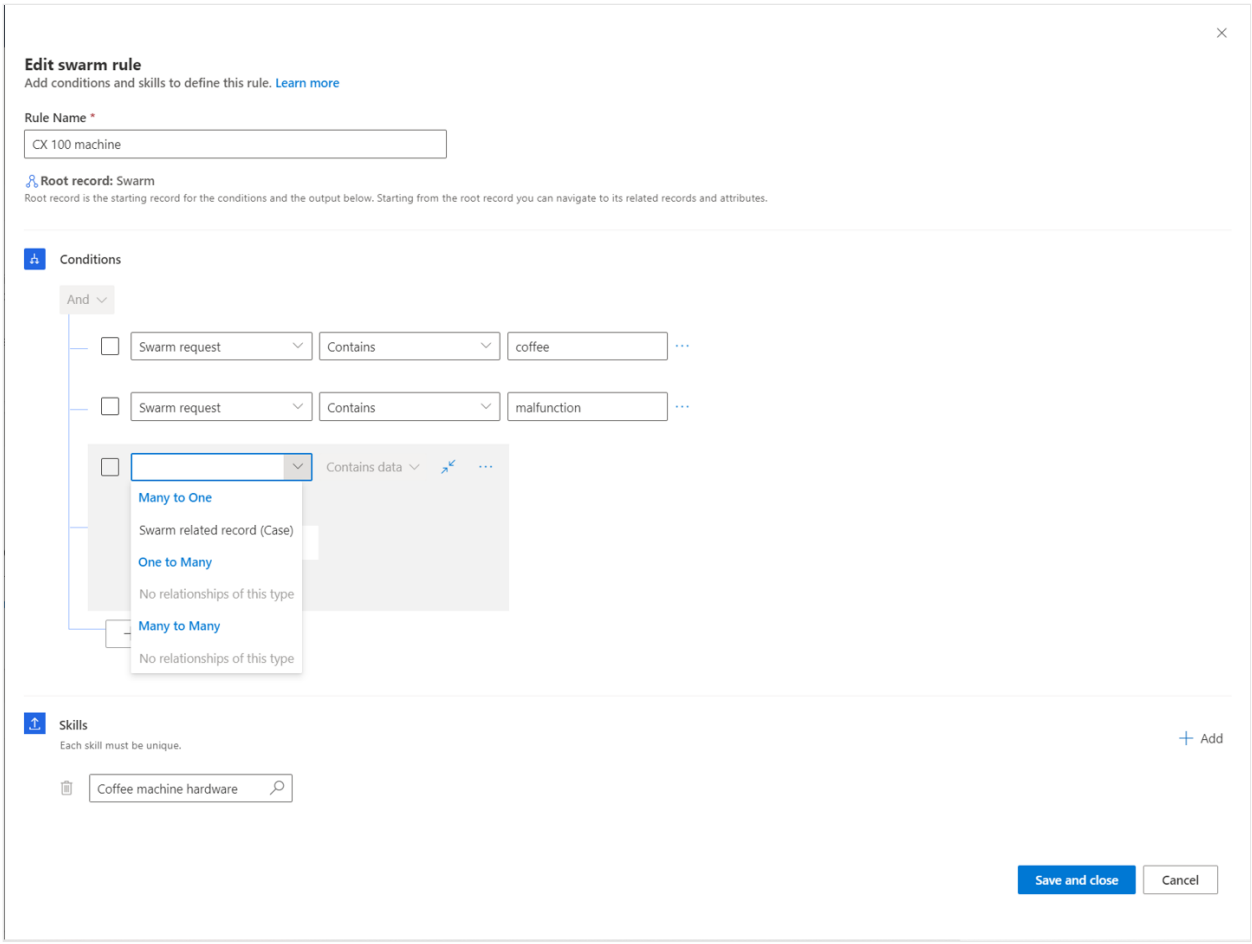
Bulk update skills

If you want to update the skills for multiple experts, you can update them in bulk using the following steps.

1. On the **Customer support swarming (preview)** configuration page, go to the **Skills** card and select **Add a new expert**.
2. On the **Contact center users** page, select **Swarm experts** from the dropdown menu.
3. Select the users you for which you want to bulk update the skills, and then on the command bar, select **Update user attributes**.
4. On the **Update Skills** page, select the skills and proficiency levels from the dropdown list, and then select **Save**.

Define condition rules

You can define swarm rules that identify the skills that should be suggested when an agent makes a swarm request. Expert suggestions are defined with the goal of finding the minimum set of experts in your organization who match the maximum number of skills suggested for a swarm.

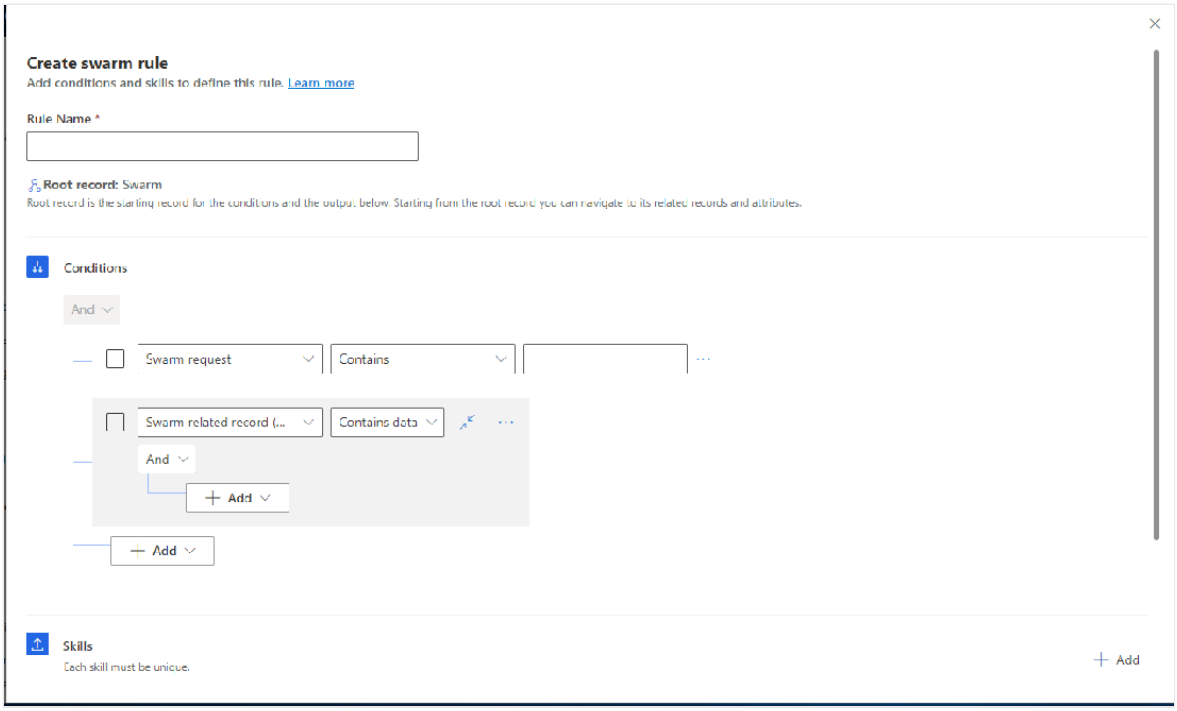


The following aspects apply to swarm rule configuration.

- Only the top three rules are shown on the main swarm page. To view more rules, select **See more**.
- You can define rules based on the related case and account attributes. By default, the swarm request, or the question the agent needs help with, is automatically suggested as one of the conditions.
- Depending on the rules you define, you can add one or more specific unique skills.
- When skills are being matched, the system runs through all possible rules, up to 100 rules.
- Rules are run in the order in which they're listed. As an administrator, you can reorder, edit, delete, or copy rules.

To add a new rule, perform the following steps.

1. On the **Condition rules** card, select **See more**.
2. On the **Condition rules** page, select **Create rule**. The **Create swarm rule** page is displayed.



3. Add a name for the rule, and then add the conditions and skills to define the rule.

4. To add a new skill from the rule builder, do the following:
   a. In the **Select skills** field, select the search icon. A **Lookup Records** pane is displayed.
   b. In the **Look for characteristic** field, select the search icon. A list of **Characteristics** is displayed.
   c. Select the characteristics you want, or select **Advanced lookup**. A page opens where you can choose skills (characteristics) using **Add new record**. If you choose **New characteristic** on the **Lookup records** pane, you have to leave the current page to create the new skill.

How contacts are added automatically to swarms

In addition to matching skills to find experts, by default, the system adds out-of-box contacts to the swarm. These participants are added to the swarm automatically without a swarm invitation. Typically, their role is to observe the swarm process and provide customer information if needed, or manage customer communications.

Swarm contacts can optionally include any of the following persons.

- The agent's supervisor. (This person can be the same for many agents on the team). If a supervisor isn't identified for the agent, the administrator who enabled the swarm is automatically added.
- The administrator of the team the agent is a member of.

- The owner of the related account.

Edit the agent guide

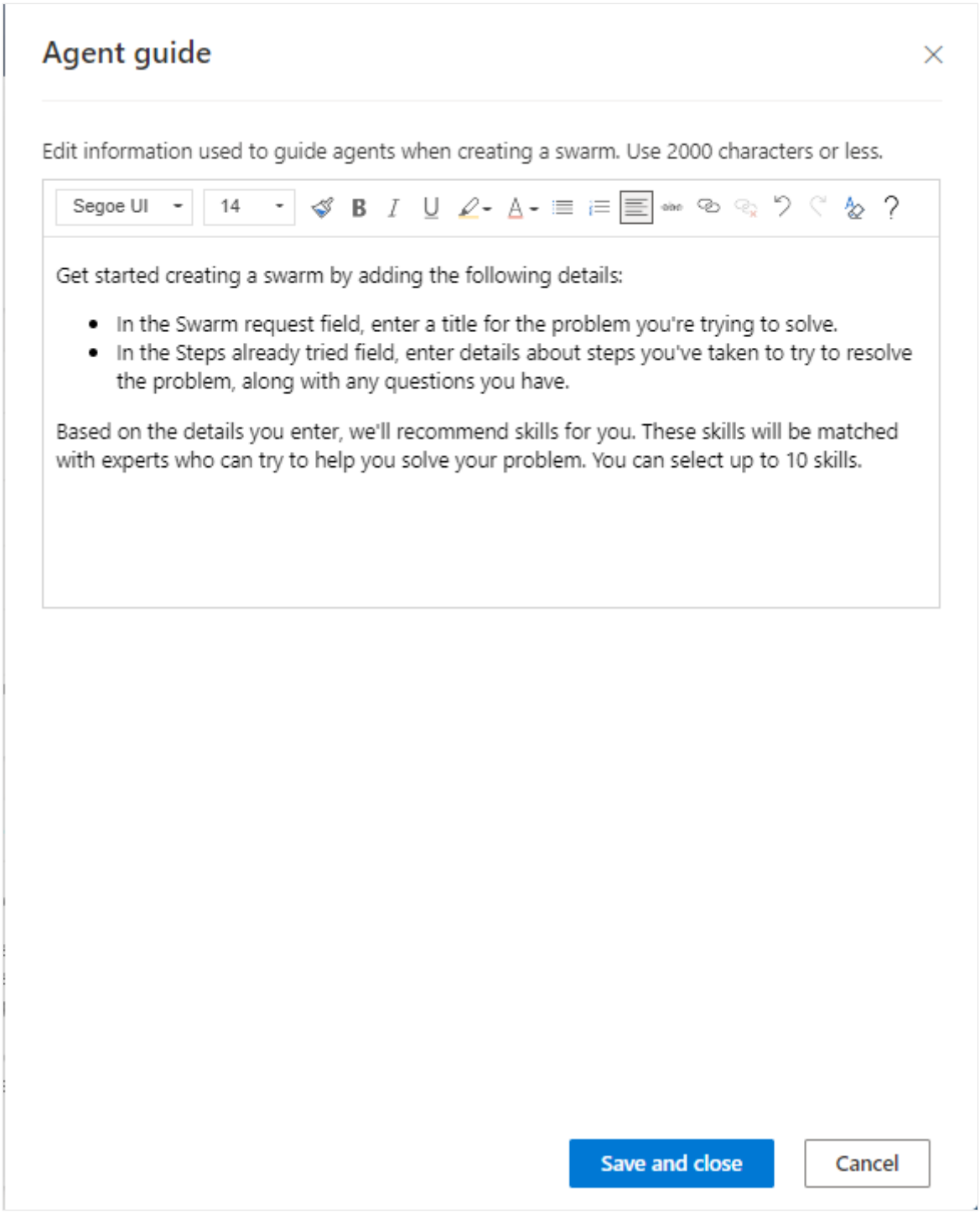
The agent guide is the direction provided by you, as the administrator, that appears in the swarm form when the agent opens it. The agent guide helps ensure that your agent types the right questions. It provides helpful context to effectively match skills and experts.

When creating the agent guide, keep the following things in mind:

- You can edit the guide content, and the guide you create will apply to all different swarm types. It can't be further customized.
- The guide template is rich text-enabled.
- The guide template has a 2,000-character limit.

To create the agent guide, perform the following steps.

1. On the **Agent guide** card, select **Edit**. The **Agent guide** page is displayed.



2. Type your details, and then select **Save and close**.

Grant swarm privileges for agents

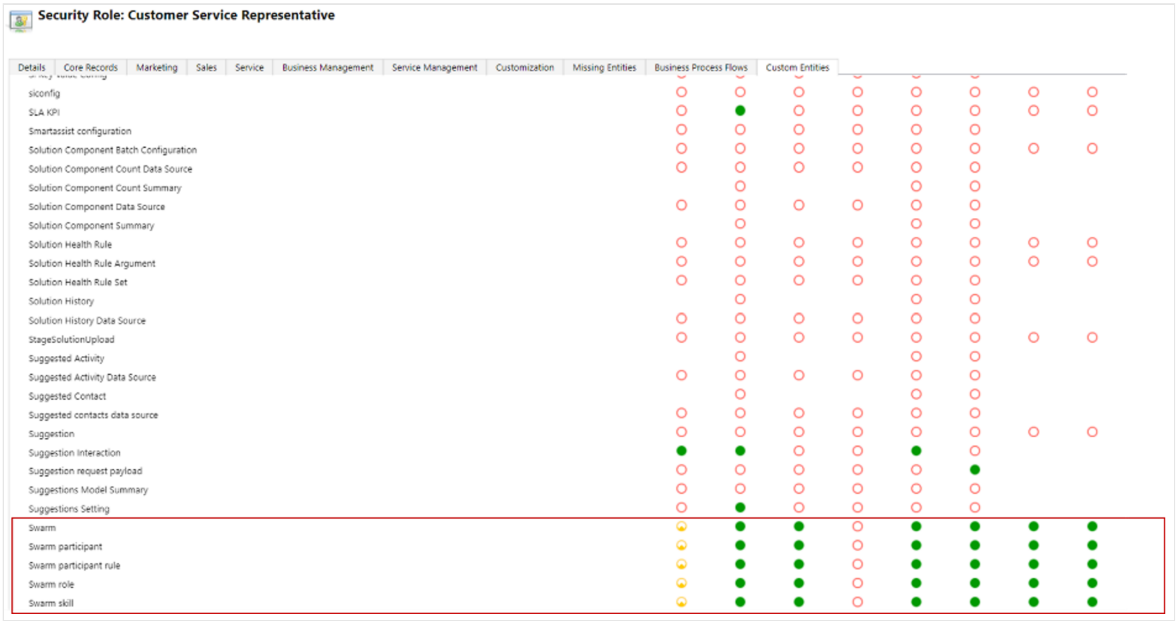
Agents need specific privileges to ensure that they can effectively swarm. Use the following table to understand the privileges and types.

Swarm privilege	Privilege type
Swarm	Read, create, update, share
Swarm participant	Read, create, update, share

Swarm privilege	Privilege type
Swarm participant rule	Read
Swarm skill	Read, create, update, share
Swarm role	Read
Characteristic	Read
System user	Read

To set up swarm privileges for agents, perform the following steps.

1. Go to Power Platform admin center, and then in **Environments** > **Environment name**, select the ellipsis, and then select **Settings**.
2. In **Users + permissions**, select **Security rules**.
3. Select the security role (for example, **Customer Service Representative**), and then select the following roles to apply the following privileges:
    - Swarm
    - Swarm participant
    - Swarm participant rule
    - Swarm role
    - Swarm skill



4. Select the **Service** tab, and then for **Characteristic**, select the security privileges.
5. Save and publish your changes.

Turn on the swarm feature on the Customer support swarming page

1. Select **Collaboration** in the site map. The Collaboration page is displayed.
2. Next to **Customer support swarming (preview)**, select Manage.
3. Set the **Swarming** toggle to **On**.

See also

Use customer support swarming

Use Teams chat in Customer Service

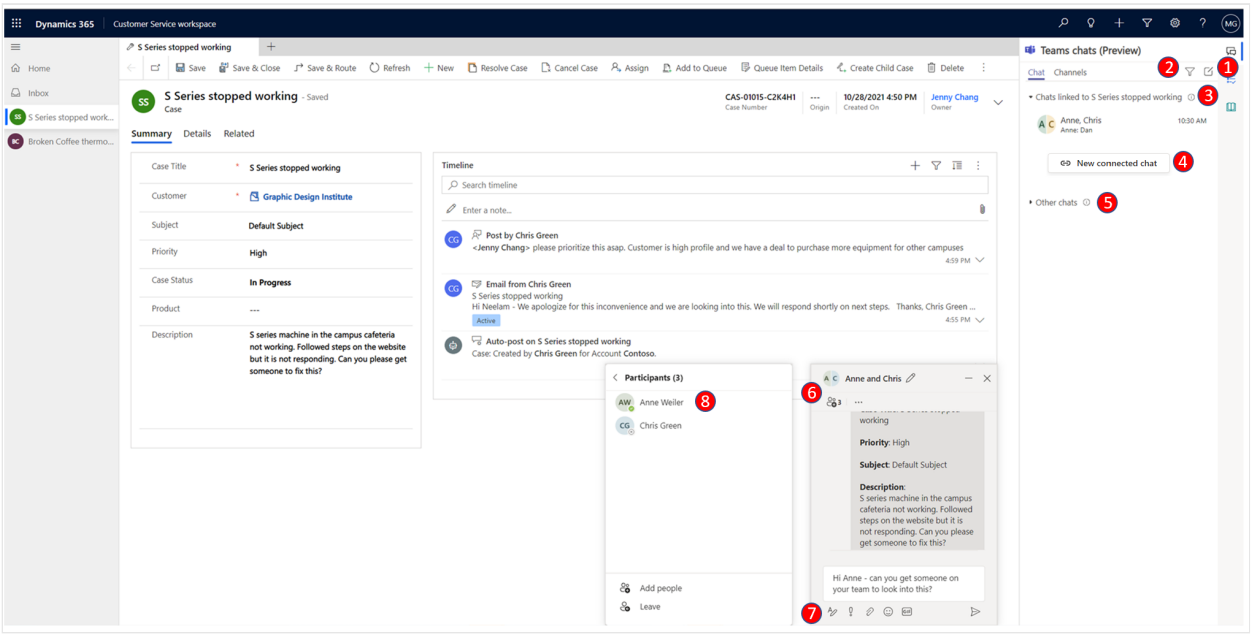
Article • 10/03/2023

As an agent, you can chat in Microsoft Teams from within Dynamics 365 Customer Service Hub, Customer Service workspace, and any custom app. While working on customer records, you can start a new chat or connect an existing chat to a record, and thus collaborate efficiently without switching context or leaving the application. Connecting all the associated chats to a record can help you maintain all the conversations related to the record in one place.

> **Note**
>
> This feature must first be enabled by an administrator, and you must have certain permissions to access Teams data. More information: **Configure Teams chat in Customer Service**

Agent overview of key features for Teams chat

The following image displays the key features of the agent Teams chat experience.



The following legend describes the numbered callouts in the above image.

Number	Feature	Description
1	New chat	Create chats that aren't associated with any Dynamics 365 records.

Number	Feature	Description
2	Filter	Filter chats by name.
3	Chats connected to other records	Chats that are associated with other Dynamics 365 records that the current user is a part of. Users can prioritize responses to these chats over other chats.
4	New connected chat	Start a new chat that is connected with the record. These chats can only be viewed in Dynamics 365 by the chat participants.
5	Other chats	Chats that aren't connected to any records or started from Teams.
6	Chat control	Allows users to multi-task across chats.
7	Basic Teams functions	Format, use emojis or .GIFs, set delivery options, and attach files.
8	Add/remove participants	Select who participates in the chat and who doesn't.

Open Teams chats that are related to a record

You can open any Dynamics 365 Customer Service record and select the **Teams chats and channels integration** icon. The **Teams chats** panel opens with the following sections in the **Chat** tab:

- Chats connected to the record: Lists Teams chats that either you've connected to the selected record or someone else has connected a chat with you as a participant.
- Suggested contacts: Lists suggested contacts depending on the users who are working on the record. For more information, see Use suggested contacts to collaborate with the right coworkers.
- Other chats/All recents: Lists your top 50 chat conversations on Teams. You can select any existing conversation and connect it to a record.

Start a new connected chat

You can start a new connected chat or convert an existing Teams chat into a connected chat to associate the chat with a Dynamics 365 record. Standard record types, including case, conversation, account, contacts, knowledge article, and email, are available out of the box, or your administrator can add your desired record type.

Your administrator can configure an optional message that you can send when using the chat to start a collaboration. This message helps you to share succinct, read-only context with your collaborators on Teams.

If you're using Teams for the first time within Customer Service Hub or Customer Service workspace, you can select the blue bubble, and then follow the interface guidance.

1. Open any Dynamics 365 Customer engagement record, and then select the **Teams chats and channels integration** icon. The **Teams chats** panel opens.

   - You can access the embedded chat from Customer Service Hub and custom apps. When you select the Teams chat icon, the chat pane opens as an app in the right-side pane.
   - If you're in a multisession app, such as Customer Service workspace, you can access the chat pane directly from the productivity pane.

     > ⓘ **Note**
     >
     > You can also access the chat pane from the home session in Customer Service workspace. When using the chat pane from the home session, you'll see two sections: Chats connected to records and Other chats (if enabled by your administrator).

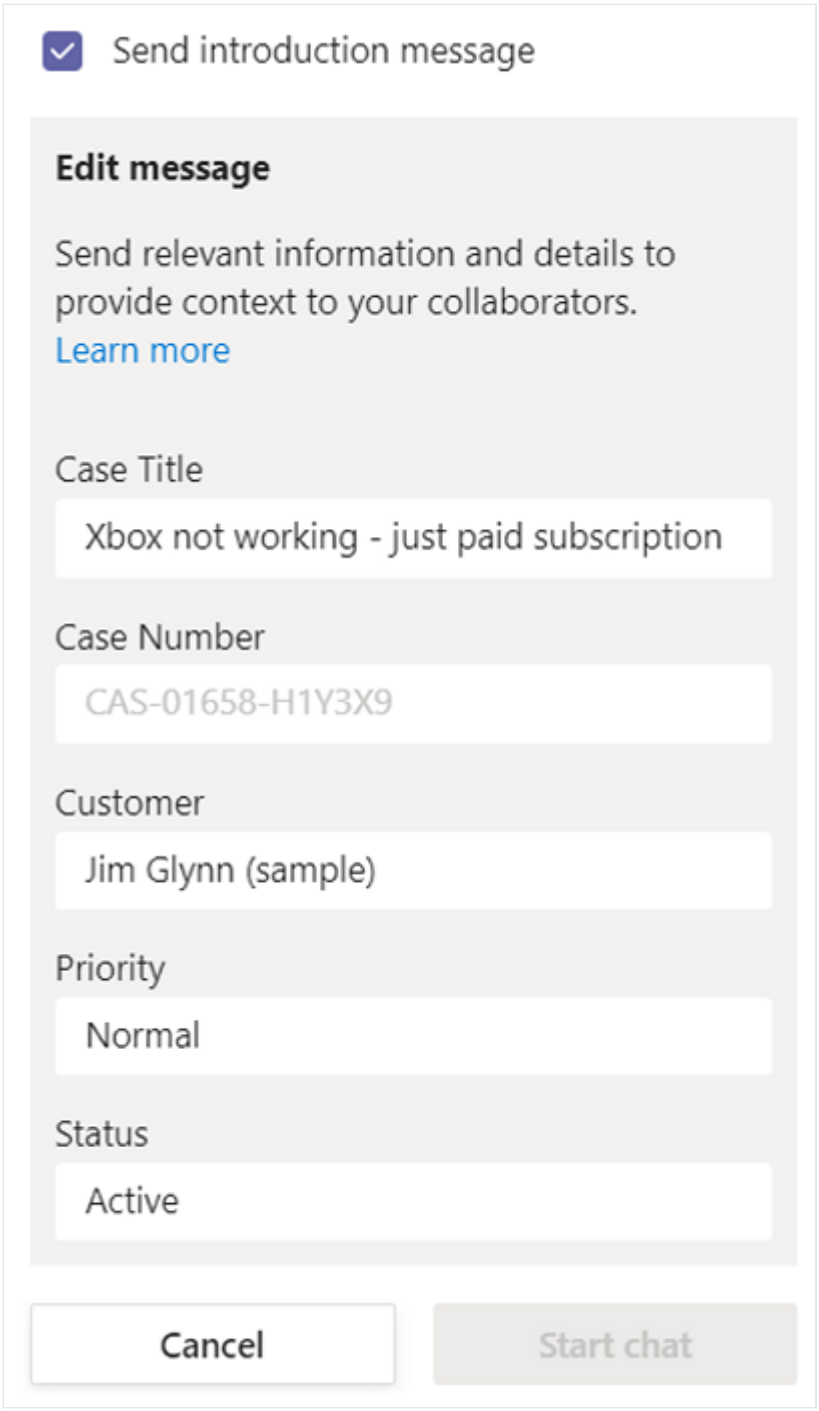
2. Use one of the following methods:
   a. To start a new connected chat with a participant, select **New connected chat** in the **Chats connected to record** section. Type the name(s) of the participant(s) you want to chat with. You can start with just one collaborator and then progressively add more as needed (see step 6). Every new connected chat starts fresh, without bringing context from one-to-one chats or other chats you may have had with the participants. Therefore, it's important to name your chats appropriately to match the context of the record and conversation. For more information, see step 3.

   b. To start a connected chat with a suggested contact directly on the chat list, select the contact with whom you want to chat.

   > ⓘ **Note**
   >
   > You can only connect group chats to records. Direct, one-to-one chats can't be connected, and will instead display an option to start a new connected chat with that contact.

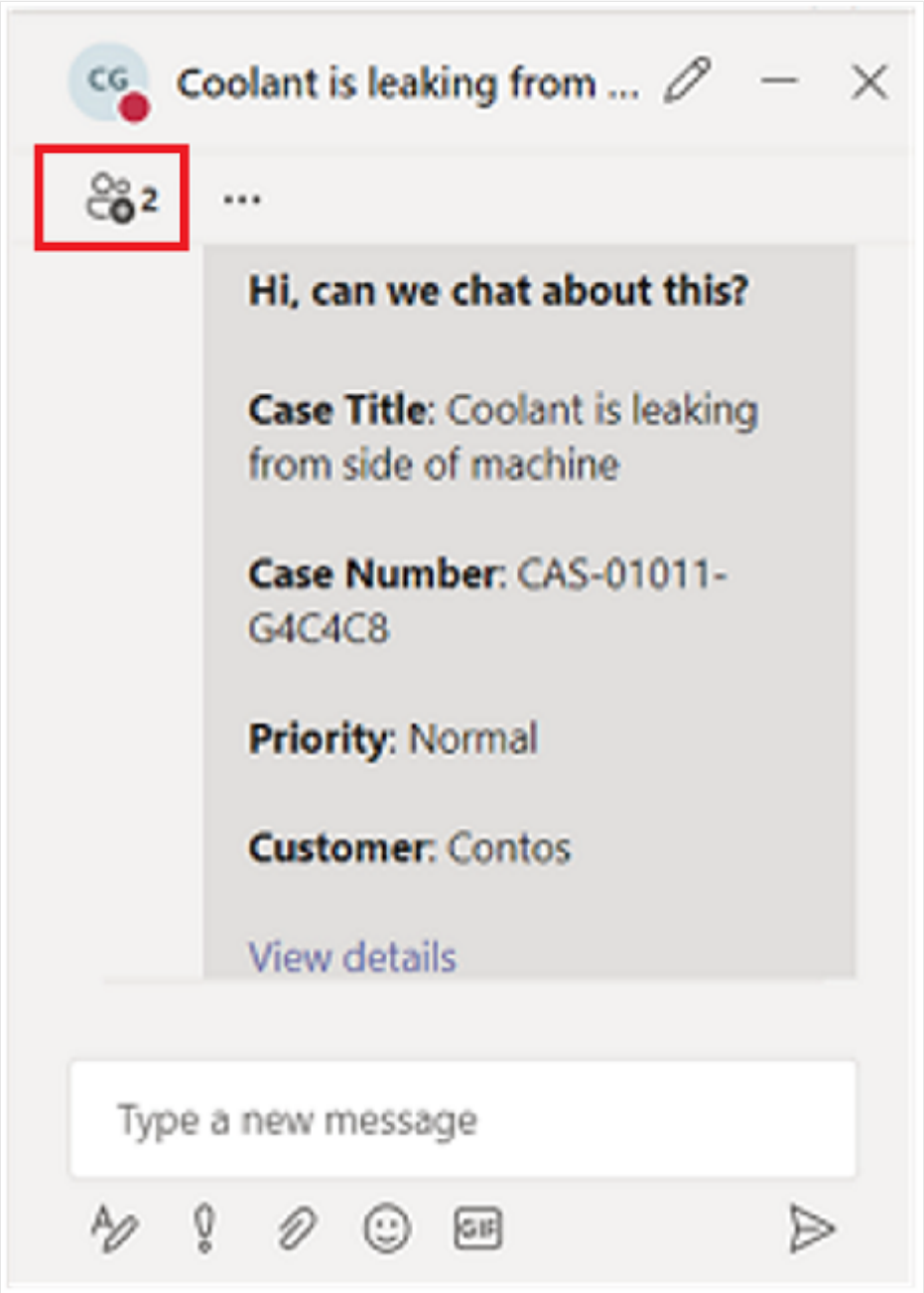
3. The chat name uses the record name or the participants' name, depending on the configuration that your administrator has set up. To set the chat name as the record name, you can ask your administrator to turn on the **Auto-name chats** setting. You can modify the chat name. Provide a meaningful name to the chat so that you can identify the chat, even on Teams. The name also helps your collaborators on Teams to easily identify chats that are associated with Dynamics 365 records.

4. Your administrator can configure an optional note that you can send when using the chat to start a collaboration. The introduction note uses selected data fields from the associated record. This note helps you to share succinct, read-only context with your collaborators on Teams. The note also includes a link to view the associated record in Dynamics 365. If your collaborators have a Dynamics 365 license and access to the record, they can view the full record details in a browser tab.



5. To convert an existing group chat into a connected chat, select a chat from the **All recents** section. Select the **More Commands** ellipsis (...), and then select **Connect chats to record**.

6. (Optional) You can add more participants to the chat directly from the chat control by selecting the **View and add participants**.



Connect or disconnect an existing chat from a record

You can connect a chat to a single record or multiple records. For example, if you have a chat about a case that turns into a work order, you can also connect the chat to the work order. If you decide later that you don't want the chat to be connected to the case, you can disconnect it if your administrator grants you permission to do so.

- To connect a chat to a record, select ellipses next to the chat, and then select **Connect to this case**.
- To disconnect a chat from a record, select ellipses next to the chat, and then select **Disconnect from this case**.

Understand how disconnected chat rights are assigned

As an agent, you have the following three options for getting rights to disconnect chats, all of which your administrator controls.

- You're the record owner, and your administrator enables this capability.
- You're the most recent user to connect the chat to the record, and your administrator enables this capability.
- Your administrator assigns the right to disconnect chats to you if you need the ability to disconnect chats from records.

If your administrator hasn't assigned any of the above rights to you or your role, you won't be able to disconnect any chat that you or other users have connected to records. If you need the ability to disconnect chats from records, ask your administrator to assign the rights to you.

Use suggested contacts

The suggested contacts list displays users who are connected or have interacted with the record. Suggested contacts might include a team administrator or members who have logged an activity in the record timeline, and so forth. There are two different types of suggestions: AI-based and rules-based. For more information, see Use suggested contacts to collaborate with the right coworkers.

Connect a Teams channel to a record

The **Channels** tab lists the channels that either you've connected to the selected record or someone else has connected a channel where you're a participant. If you've connected a record to a channel using basic or enhanced collaboration experience, that channel is also listed in this tab.

You can connect relevant Teams channels to a record, so that all the members can easily access the connected channels from the record and follow the conversation.

1. Open any Dynamics 365 Customer Service record, and select the Teams chat icon.
   The **Teams chats** pane opens.
2. Select the **Channel** tab. The tab lists the channels that are already connected to a record.
3. Select the **Connect a channel** icon in the upper-right corner of the Teams chats pane.

The **Collaborate with Microsoft Teams** dialog opens.

4. To start a new connected channel, select **Create a new connection**.
5. To connect an existing channel, select the channel from the list, and then select **Start collaboration**.

Join a chat

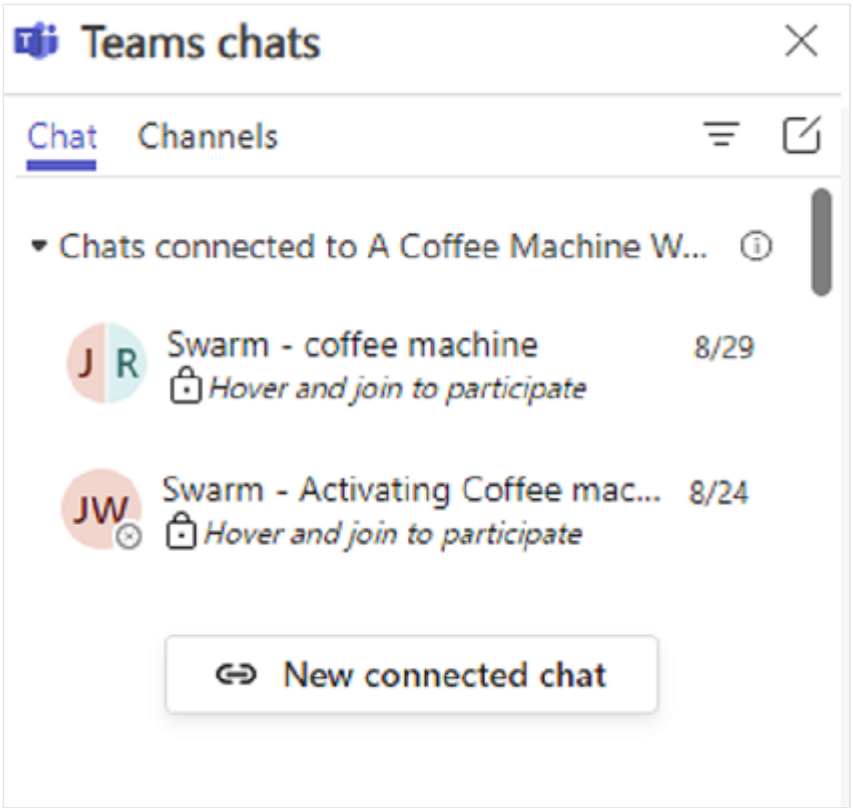
As an agent, you can view and easily join chats that are connected to a record you have write access to, even if you weren't originally a participant in the chat. Some scenarios where this feature can be useful include:

- **Case transfers**: If you've onboarded to a case that another agent previously handled, you can join the chat to better understand the context of the case, and then continue to collaborate with your relevant colleagues.
- **Case escalations**: If a case needs attention from someone with specific knowledge, the subject-matter expert who reviews it can participate in the relevant conversations.

> ⓘ **Note**
>
> You can only join connected chats, and to do so, you must have write access to the record and your administrator must have turned on the Join Chat capability for the record type for which you want to join an existing connected chat.

To join a connected chat:

1. Open the record for which you want to join the chat.
2. In the **Teams chats** page, go to any of the connected chats you want to join. A lock icon is displayed with text that says "Hover and join to participate." When you hover over the lock icon, if you have write access to the associated record, a **Join** button is displayed.

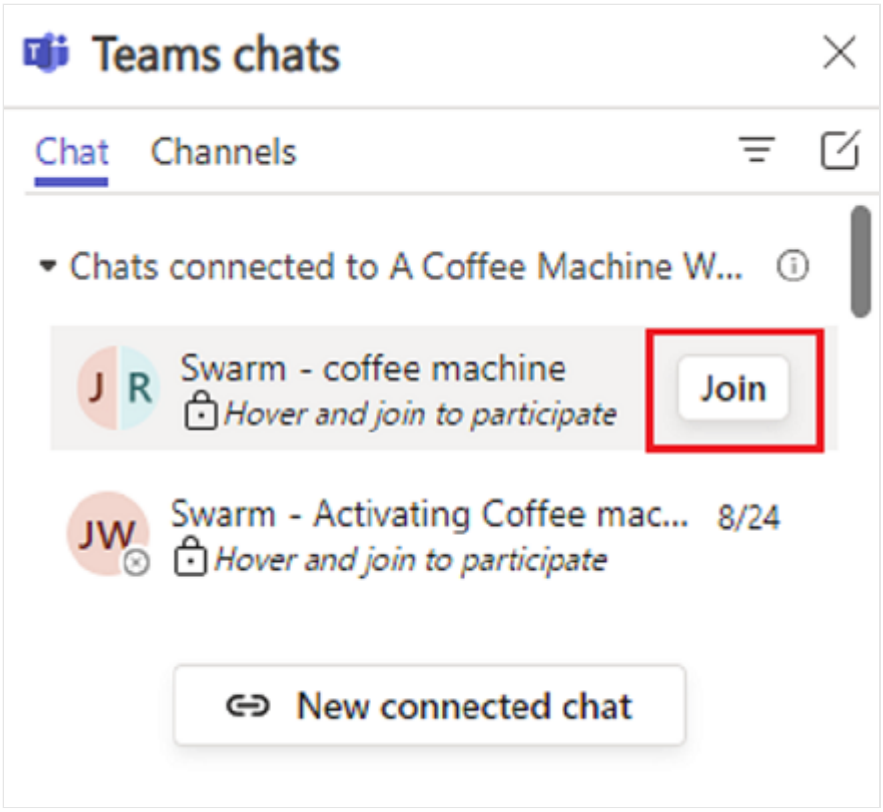


Note

If you don't see the text that allows you to hover and join a chat, there are three possible reasons for this:
- Your administrator hasn't enabled Join chat capability for the entity.
- You have read-only access to the record.
- Both scenarios in 1 and 2 apply.

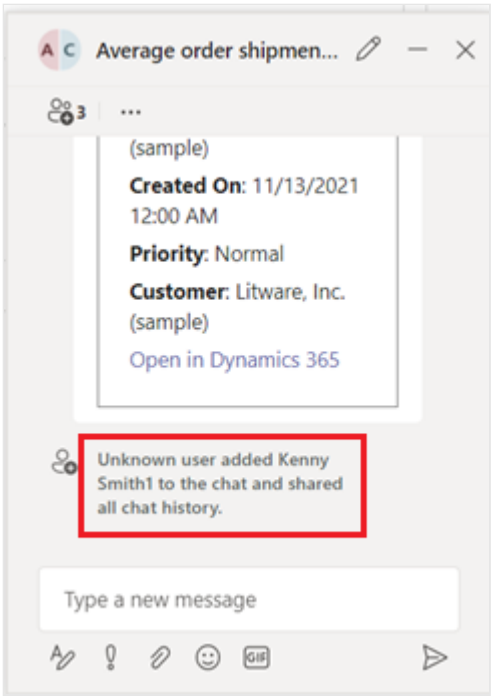
In any of these scenarios, you can ask a member of the chat to manually add you, or you can ask your administrator to turn on the Join chat setting for that record type.

3. Select **Join**.

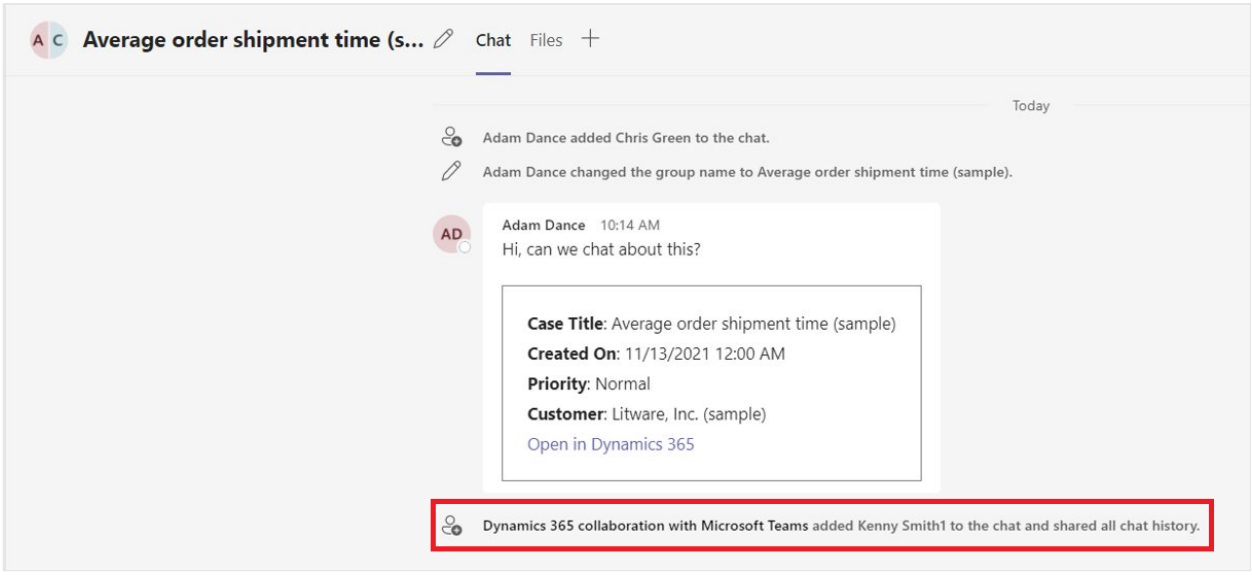


The Teams popup chat shows that you've been added to the chat, and you have access to the entire chat history. Other chat members also receive the system message that you've been added to the chat.

> **Note**
>
> When a user is added using Join chat, any users who are chatting directly from Dynamics 365 apps will see a system message that says an unknown user added the new user to the chat and shared all of the chat history. This is a known issue that is specific to the embedded chat experience, and we're working to resolve it.



If you're using the Microsoft Teams app, when joining a chat, the following message is displayed: Dynamics 365 collaboration with Microsoft Teams added <user name> to the chat and shared all chat history.

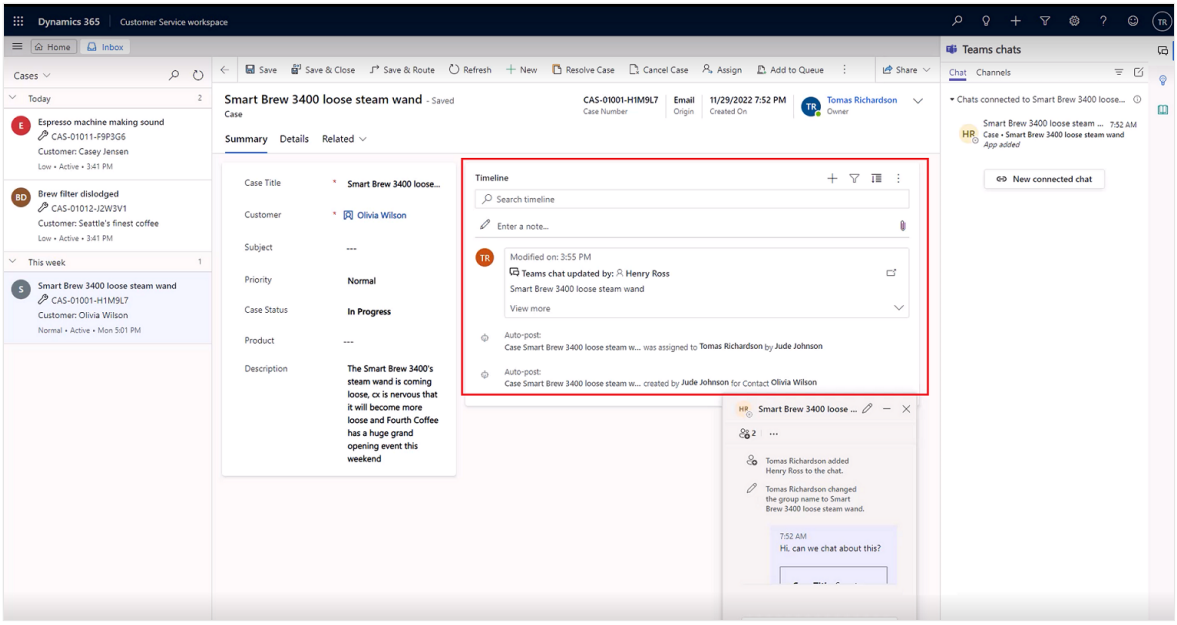


View Teams chats in the timeline for a record (preview)

As an agent, when you start a connected chat or connect an existing chat to a record, you can see the chat appear as a new activity in the timeline. The timeline entry shows details about who connected the chat and when they connected it. It also shows the last person to send a message in the chat, and when they sent it. If the Join chat setting is turned on in your organization, agents can also directly join the chat or be added as a chat participant and see the full exchange.

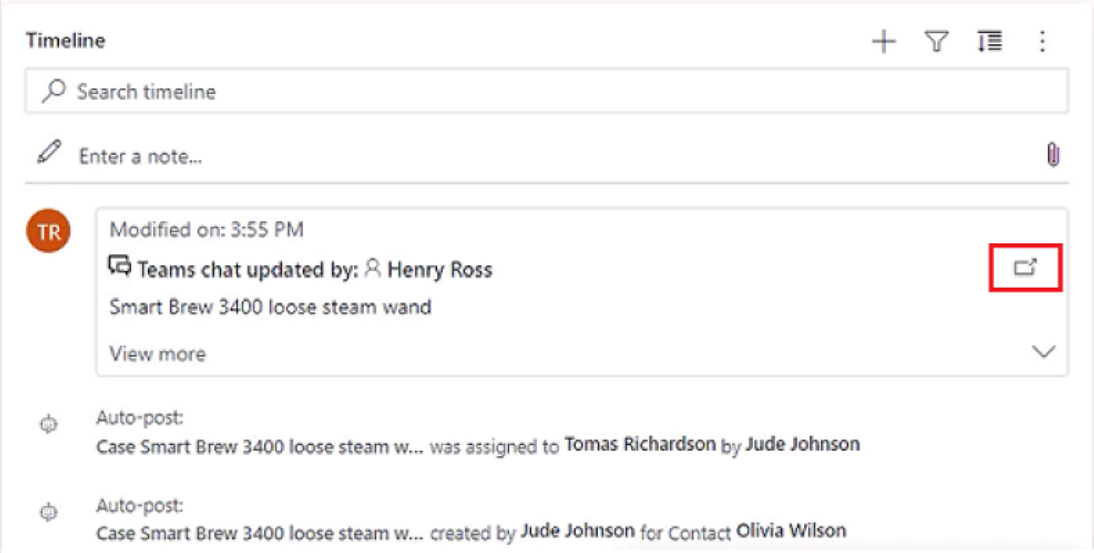
> **Note**
>
> Your administrator must enable this feature before you can use it.

1. Go to the record for which you want to view the timeline or start a chat. In the timeline, you can view all chats that are associated with the record.



2. Do any of the following actions:

   - To view changes you've made in a Teams chat, manually refresh the timeline: Select the ellipsis in the right-hand corner, and then select **Refresh timeline**.
   - To view details about who initially connected the chat, select **View more** in the timeline post.
   - If you aren't a participant in a chat and your administrator has turned on the **Join chat** setting for the record, you can join the chat from the timeline by selecting the join icon.



Dynamics 365 links are unfurled in Teams chat

When you paste a link to a Dynamics 365 Customer Service or Power Apps record into a Microsoft Teams chat, meeting, or channel, participants see an adaptive card with details about the shared link. Links to canvas apps show the app name and record name. Model-driven app links to records show the table type. When you paste the link, you can delete the card in the message compose window before sending the message if you don't want to send the link as a card.

> **Note**
>
> If you don't have access to the app or record for which you paste a link, no app or record details will be shown in the unfurled card.

See also

Configure Teams chat in Customer Service

Use suggested contacts to collaborate with the right coworkers

Article • 10/03/2022

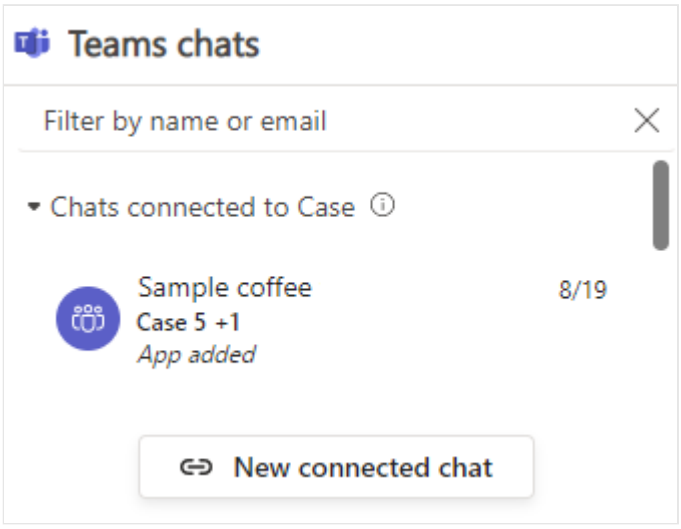
The Teams chat embedded in Dynamics 365 Customer Service Hub, Customer Service workspace, or custom apps can help you more quickly find the right coworkers to collaborate with. This collaboration can help you more quickly resolve customer issues.

To use suggested contacts, your administrator must enable the feature. For the case record type, there are two types of suggestions: AI and rules-based. Other record types enabled for connected chats may only have rules-based suggestions.

- AI: Suggestions based on cases that were resolved by other agents. More information: Collaborate with AI-suggested contacts in Microsoft Teams
- Rules-based: Suggestions of coworkers who are associated with the connected record or other related records. For example, an agent can see suggestions to collaborate with their supervisor, the account manager for the customer, or a colleague who updated the case timeline with a note or task. More information:

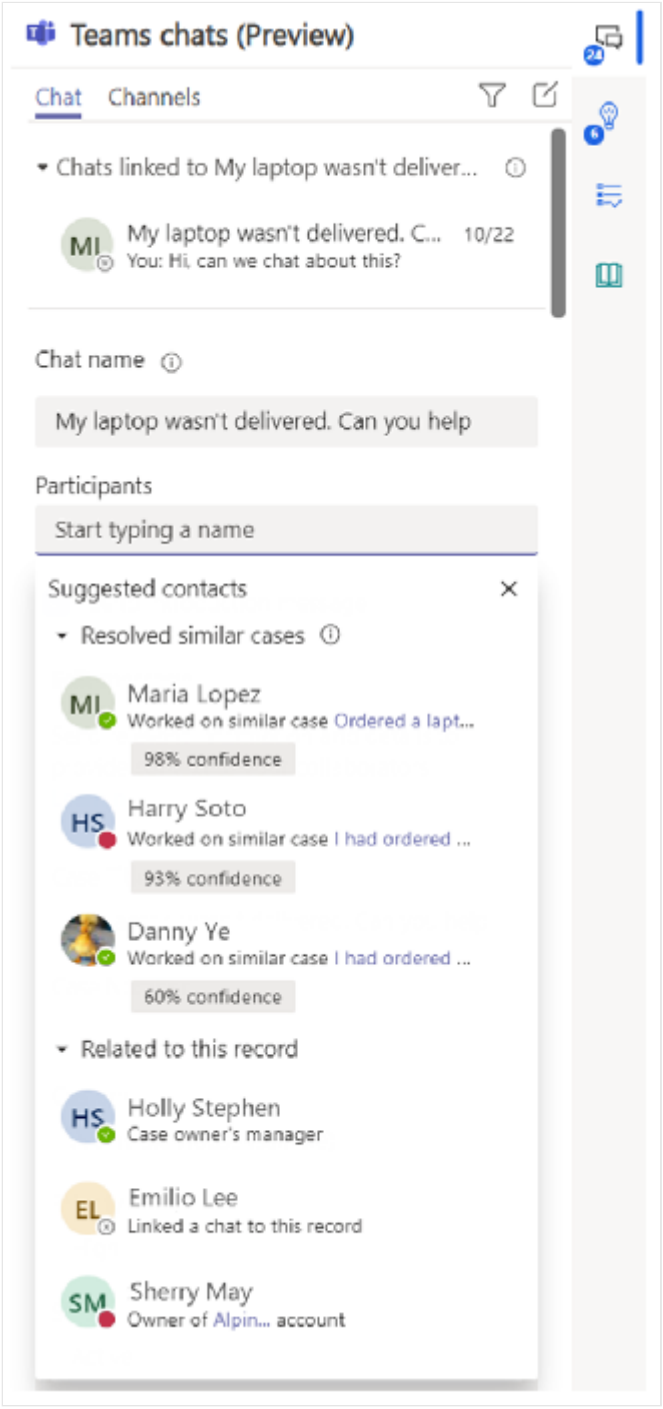
View suggested contacts

1. Open the collaboration pane, and then select **New connected chat**.



2. A dropdown list of suggested contacts is automatically displayed in the **Participants** section. The list has two sections: Suggested contacts who've resolved similar cases, and contacts that are related to the record. Note the following details about the suggestions that are displayed:

- The rules-based suggestions will show only contacts that have been enabled by your administrator. Additionally, the list is displayed in the order defined by your administrator.
- A maximum of three suggestions per section are displayed. If you want to see more, select **View more**.



See also

Configure Teams chat in Customer Service

Use Teams chat in Customer Service

Use Microsoft Teams meeting integration in Customer Service (preview)

Article • 05/26/2023

> **Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

The Teams meeting integration feature provides a unified meeting experience that helps you, as an agent, to reduce your administrative workload and increase productivity. The Dynamics 365 records are accessible while conducting a meeting over Teams, which you can refer to and have contextually relevant conversations with your customers. You can also take notes to help save time, be more productive, and leverage better data within your organization.

As an agent, you can:

- Create and join Microsoft Teams meetings directly from Dynamics 365.
- Access and update Dynamics 365 records seamlessly within the context of a Microsoft Teams meeting.
- Capture notes and tasks seamlessly during a Microsoft Teams meeting, and have these notes and tasks automatically sync to records in Dynamics 365.

Meeting lifecycle

The lifecycle of a meeting can be divided into the following stages, with each stage catering to specific tasks:

- Pre-meeting: In this stage, you perform the following tasks:
  - Create a Teams meeting
  - Join a Teams meeting
  - Add Dynamics 365 app to a Teams meeting
  - Use the Dynamics 365 app to view and update record information
- In-meeting: In this stage, you perform the following tasks:
  - Use the side-panel to view and update record information
  - Work with notes during a meeting
  - Work with tasks during a meeting
  - Work with activities during a meeting
- Post-meeting: In this stage, you perform the following tasks:
  - Use the Dynamics 365 app to view and update record information

Create a Teams meeting

You can create a Teams meeting either from Dynamics 365 or Microsoft Outlook. While creating a Teams meeting, ensure that a Dynamics 365 record is linked to the meeting. Linking a record to the meeting enables you to view record details before the meeting, in a side panel during the meeting, and after the meeting.

You can link a Dynamics 365 record by selecting a Regarding record. When a record is linked prior to the meeting, the Dynamics 365 app is added automatically to the meeting, and you can see the details of the linked record in the side panel. If a record is not linked to the meeting, you won't be able to see the details of the linked record. In such a case, you should add the Dynamics 365 app to the meeting before it has been started, for a better experience.

Create Teams meetings in Dynamics 365

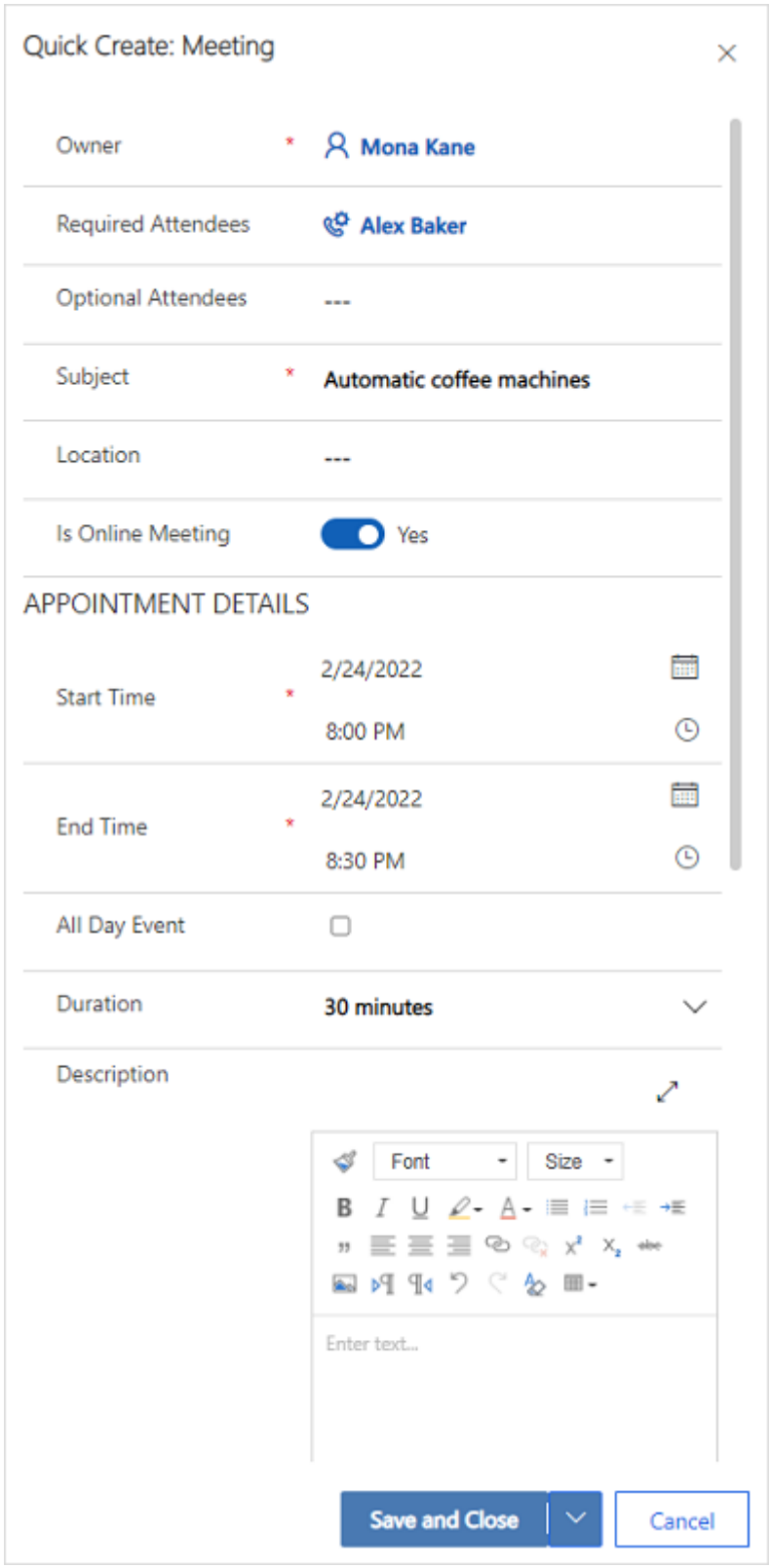
You can create a Teams meeting while creating a meeting either from the timeline of a record or from the activities page.

To create a Teams meeting from the Timeline control

1. On the timeline control of a Dynamics 365 record, select **Create a timeline record** > **Meeting**.

2. In the **Quick Create: Meeting panel**, enter the meeting information such as attendees, location, time, and description.

3. Turn on the Teams meeting toggle.



4. Select **Save and Close**. The meeting coordinates won't display until after you save and close the record.

> **Note**
>
> When you create a meeting from the Timeline control of a record, the Regarding field is automatically populated with the record name from which the meeting is

being created. This ensures that the Dynamics 365 app is added automatically to the Teams meeting and you can see the related record details during the meeting.

To create a Teams meeting from the Activities page

1. Sign in to Customer Service Hub.
2. On the sitemap, select **Activities**.
3. On the command bar at the top, select **Meeting**.
4. On the **New Meeting** page, enter the meeting information such as attendees, location, time, and description.
5. Turn on the **Teams meeting** toggle.
6. In the **Regarding** field, search and select a record that the meeting is related to. This ensures that the Dynamics 365 app is added automatically to the Teams meeting and you can see the related record details during the meeting.
7. Select **Save & Close**.

Create Teams meetings in Microsoft Outlook

You can create a Teams meeting in Microsoft Outlook, but the meeting will not be linked to a Dynamics 365 record automatically. You must install the Dynamics 365 app for Outlook to link the meeting to a Dynamics 365 record. After installing the app, open it, and search for the record in the **Set Regarding** field.

For information on creating a Teams meeting in Microsoft Outlook, see Schedule a Teams meeting from Outlook

For information on using the Dynamics 365 App for Outlook, see Basic navigation in App for Outlook (Dynamics 365 apps).

Add Dynamics 365 app to a Teams meeting

The Dynamics 365 app, when added to a Teams meeting, enables you to view record details before, during, and after a meeting. The Dynamics 365 app can be added either automatically or manually to a Teams meeting.

Automatically add the app

If you link a Dynamics 365 record to a meeting while creating it in Dynamics 365 or Microsoft Outlook, the Dynamics 365 app is added automatically to the meeting. This

allows you to view record details before, during, and after a meeting.

Manually add the app

If you don’t link a Dynamics 365 record to a meeting while creating it in Dynamics 365 or Microsoft Outlook, it's recommended that you add the app to the meeting before joining the Teams meeting for a better experience.

To add an app before a meeting, first send the meeting invite, then open the meeting in Teams. Select **Add a tab**, search for the Dynamics 365 app, and add it.

To add an app during a meeting, after the meeting starts, select **Add an app** in the meeting controls at the upper-right area of the screen, search for the Dynamics 365 app, and add it.

Work with the Dynamics 365 app

The Dynamics 365 app enables you to view information of a record that is linked with a meeting. The record details can be viewed before the meeting, in the side panel during the meeting, and after the meeting.

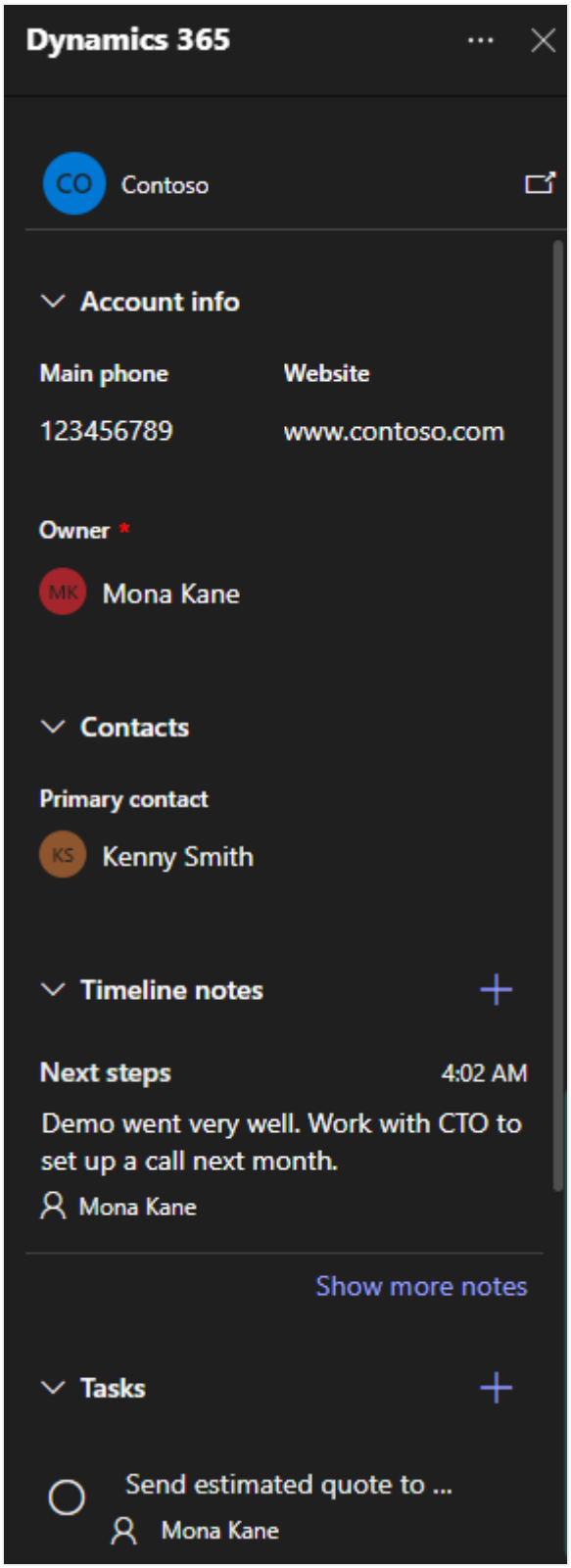
View record details before or after a meeting

Open the meeting in Teams, and then select the **Dynamics 365** tab. You can perform all actions on the linked record as you would in Dynamics 365 Customer Service.

View record details during a meeting

Select the Dynamics 365 app icon in the meeting toolbar at the upper-right area of the screen. The record details are displayed in a side panel. You can view and update information such as notes and tasks.

> ⓘ **Note**
>
> The record side panel supports only Contact, Opportunity, Lead, Account, and Case tables.



While in Teams, if you want to access a record directly in your Dynamics 365 app, you can open the record by selecting the popout icon on the side panel.

Join a Teams meeting

You can join a Teams meeting from Dynamics 365, Microsoft Outlook, or Microsoft Teams.

Join a Teams meeting from Dynamics 365

1. Open the meeting record from the **Timeline** or from the **Activities** page.
2. Perform one of the following actions:
    - On the command bar at the top, select **Join Teams Meeting**.
    - In the **Teams meeting** field, select **Join Teams Meeting**.
    - Go to the **Description** area, hold the **Ctrl** key, and select **Click here to join the meeting**.

Join a Teams meeting from Microsoft Outlook

1. Open the calendar event.
2. Perform one of the following actions:
    - On the **Meeting** tab in the ribbon, select **Join Teams Meeting**.
    - In the message body, select **Click here to join the meeting**.

Join a Teams meeting from Microsoft Teams

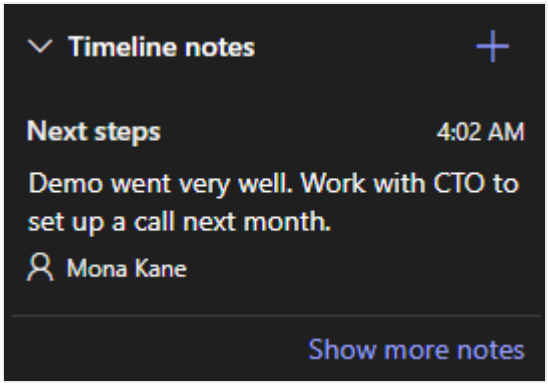
You have several options. More information: Join a meeting in Teams

Work with notes during a meeting

Prerequisites:

- A record must be linked to the meeting and the Dynamics 365 app must be added to the meeting.
- The side panel must be launched by selecting the Dynamics 365 app icon in the meeting controls at the upper-right area of the screen.

The latest note is displayed under the **Notes** section in the side panel. You can view all notes in a standalone panel by selecting **Show more notes**. If you add, edit, or delete notes from the side panel, the changes are synced with the linked Dynamics 365 record.



Add a note

1. In the **Notes** section, select .
2. In the **Add note** form, enter a title and description of the note.
3. To attach a file, select **Attach file**.
4. Select **Save**. The note is added to the record and displayed in the side panel.

Edit a note

1. In the **Notes** section, hover over the note, and then select the **Edit** icon .
2. In the **Edit note** form, update the title and description of the note as desired.
3. Select **Save**.

Delete a note

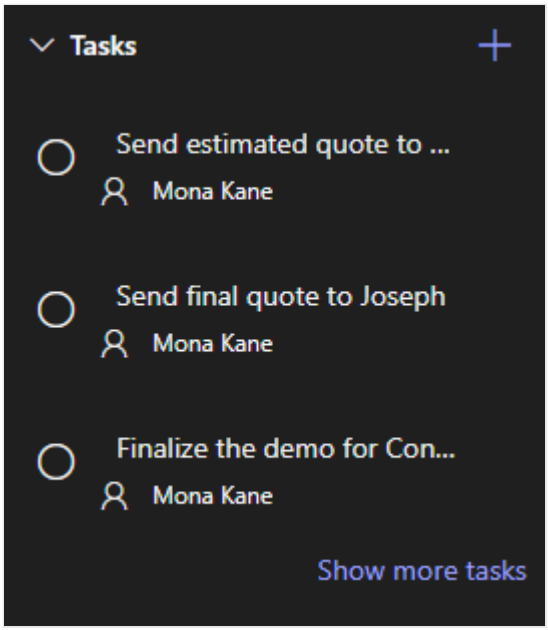
1. In the **Notes** section, hover over the note, and then select the **Delete** icon .
2. In the confirmation message, select **Delete**.

Work with tasks during a meeting

Prerequisites:

- A record must be linked to the meeting and the Dynamics 365 app must be added to the meeting.
- The side panel must be added to the meeting.

The open tasks are displayed under the **Tasks** section in the side panel. You can view all tasks in a standalone panel by selecting **Show more tasks**. If you add, edit, or delete tasks from the side panel, the changes are synced with the linked Dynamics 365 record. The tasks are sorted by their due date, prioritizing the tasks that are due soon or overdue.



Add a task

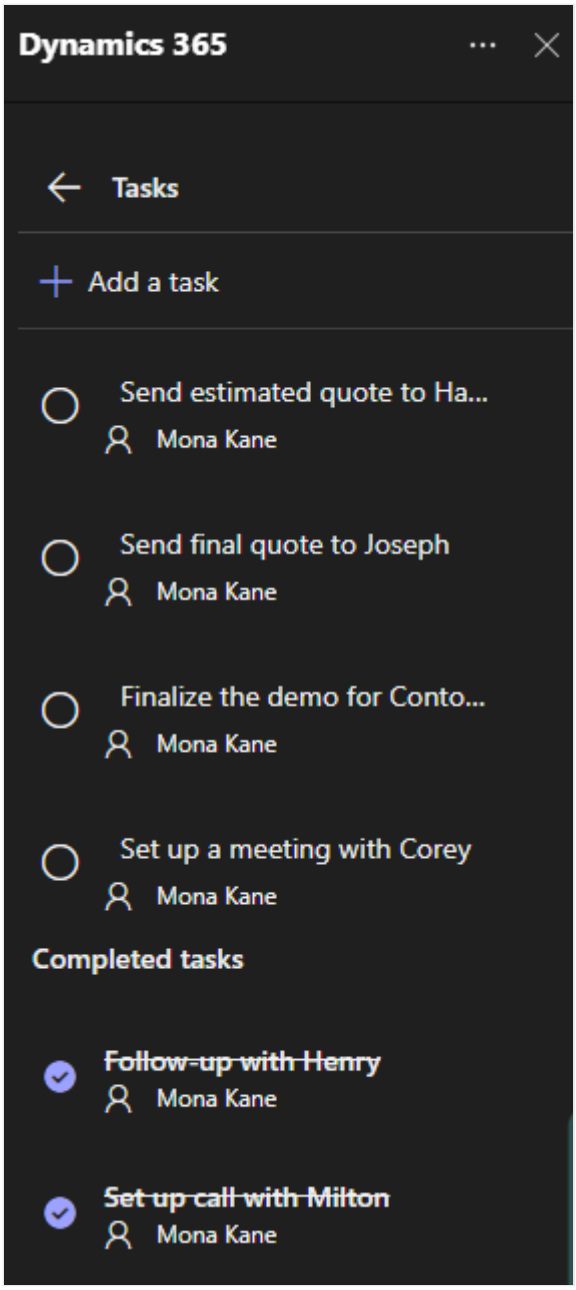
1. In the **Tasks** section, select the **Add** icon .
2. Add the task details.

Complete a task

In the **Tasks** section, select the option button for a task to mark it as complete.

Reopen a task

1. In the **Tasks** section, select **Show more tasks**.
2. In the **Completed tasks** section, select the task to reopen it.



Edit a task

1. In the **Tasks** section, hover over the task, and then select the **Edit** icon .
2. Edit the task details as desired.

Delete a task

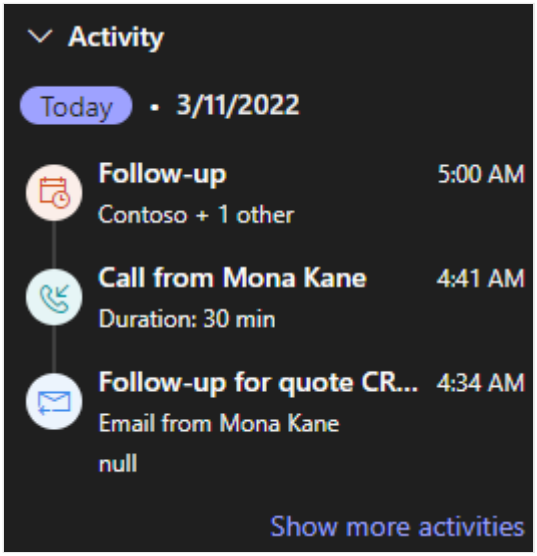
1. In the **Tasks** section, hover over the task, and then select the **Delete** icon .
2. In the confirmation message, select **Delete**.

Work with activities during a meeting

Prerequisites:

- A record must be linked to the meeting and the Dynamics 365 app must be added to the meeting.
- The side panel must be launched by selecting the Dynamics 365 app in the meeting controls at the upper-right area of the screen.

Recent activities are displayed under the **Activity** section in the side panel. To view all activities, select **Show more activities**.



You can view only appointment, email, and phone call activities that are associated with the record. To view other associated activities, go to the customer engagement app. If you want to view details of an activity, in the **Activities** section, select an activity. The activity record opens in your web browser.

See also

Configure Microsoft Teams Meeting integration in Customer Service

Collaborate with AI-suggested contacts in Microsoft Teams

Article • 01/23/2023

If your administrator has enabled AI suggestions for similar cases and configured the ability to connect chats to Dynamics 365 records, you can view suggested contacts who have resolved cases similar to yours to help you more quickly resolve customer issues. To chat with AI-suggested contacts, your administrator must also enable the option to collaborate with other contacts in Microsoft Teams.

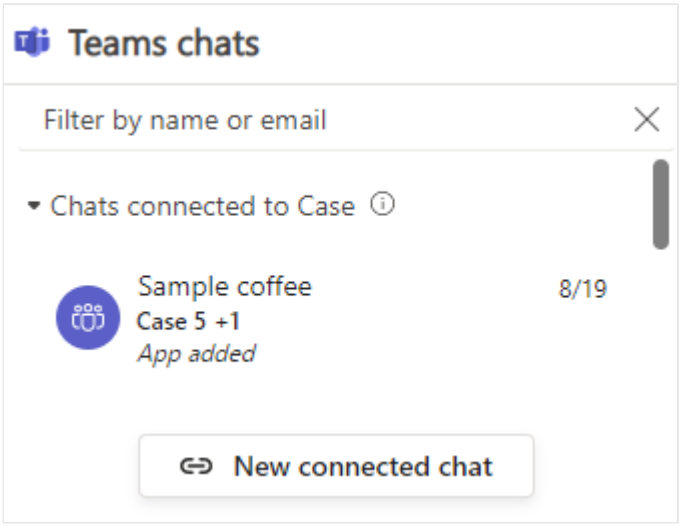
> **Note**
>
> Through Teams, agents can connect and engage with customers also if Omnichannel for Customer Service is enabled.

More information: Configure AI suggestions for contacts in Microsoft Teams

Collaborate with AI-suggested contacts in Microsoft Teams

The AI-suggested contacts in Microsoft Teams functionality is applicable for cases and support conversations in the Customer Service workspace and Omnichannel for Customer Service apps.

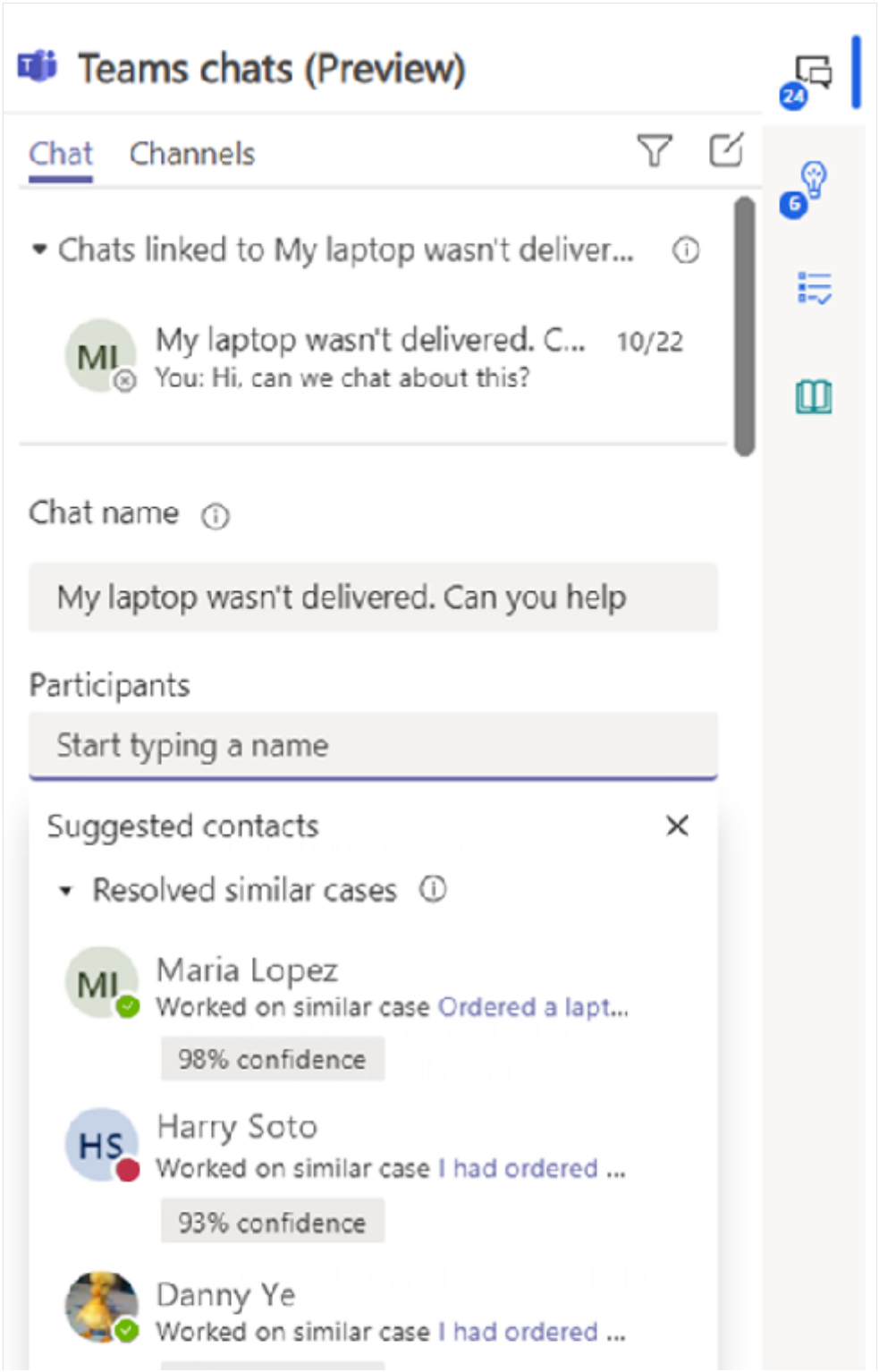
For a case or a support conversation, **Teams chat** appears in the app side pane on the right.

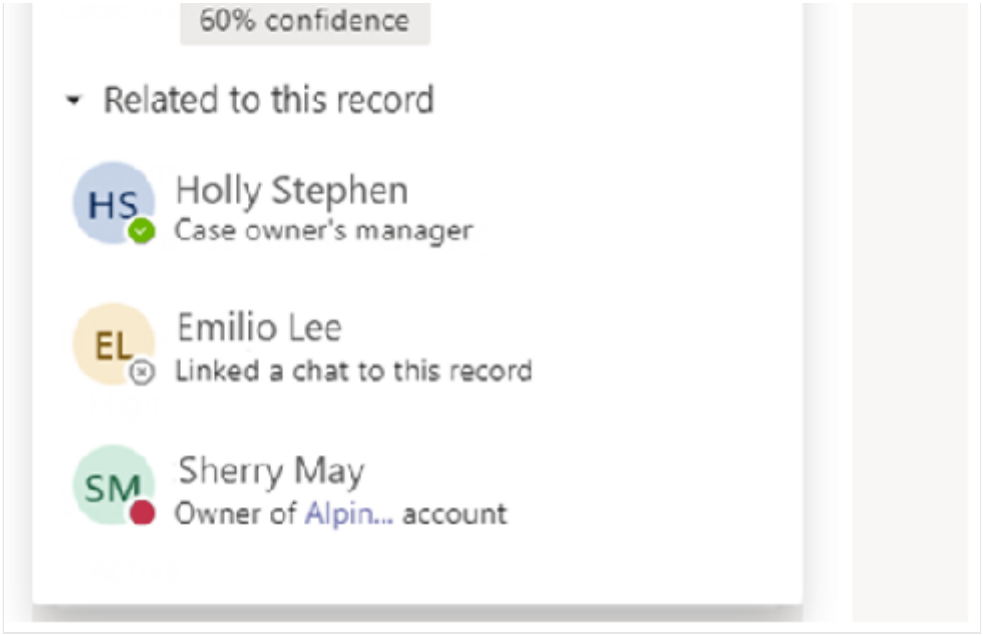


You can do the following:

1. Select **New connected chat**. The following options appear:

    - An option to enter participant agent names to create connected chats.
    - A dropdown list of suggested contacts who have worked on similar and related cases. AI and rules-based suggested contacts are listed if admins have enabled both of these options.
    - If the AI-suggested contacts functionality is enabled, a **Resolved similar cases** section is displayed in the dropdown list.



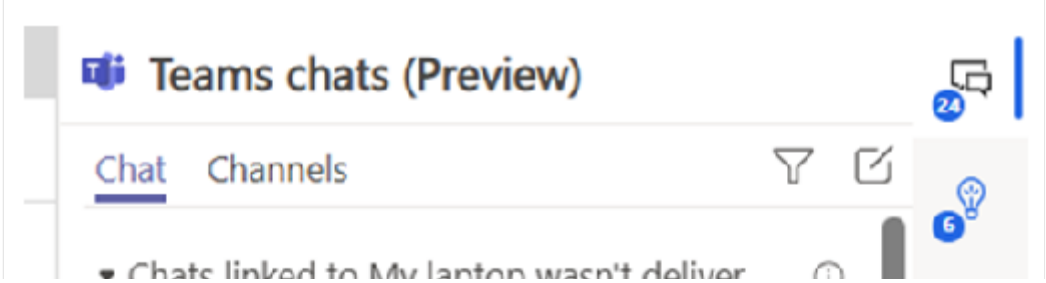


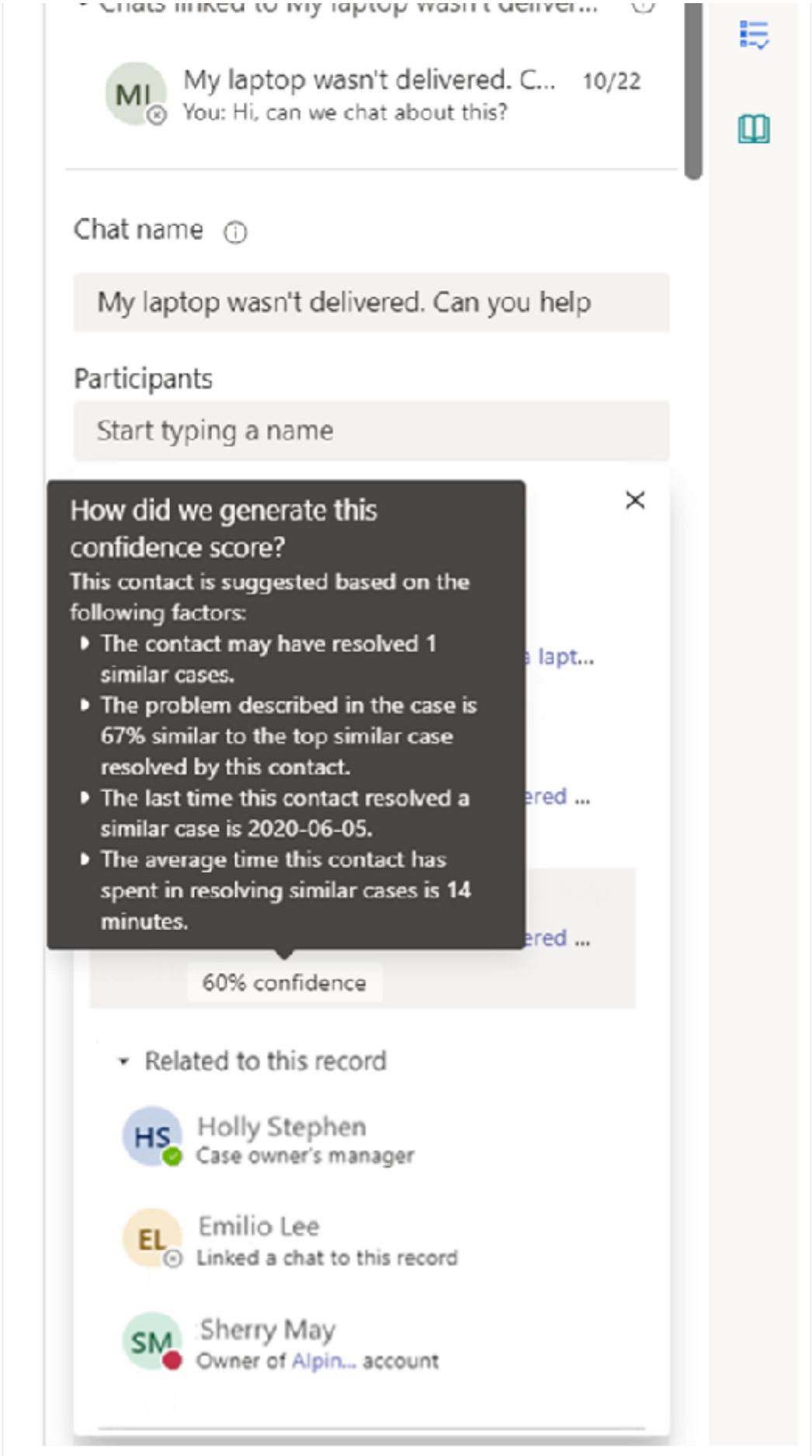
  - If no similar cases exist, a message is displayed that no suggested contacts can be found.
  - If the administrator hasn't enabled **Join chat** feature, a message is displayed that only chat participants can see this conversation. More information: Configure the ability for users to join chats

- Each AI-suggested contact is displayed with the following details:
  - Full name
  - Display picture if available
  - Link to the top similar case, which is displayed under the contact's full name. "Worked on similar case `<similar case title>`. Agents can select the link to view the similar case.
  - Confidence score that indicates how confident the AI model thinks the suggested contact can help on the active case or conversation.

- The confidence score is based on multiple factors:
  - Number of similar cases that the suggested contact resolved.
  - The similarity of the similar cases to the active case or conversation.
  - How recent the suggested contact resolved the similar cases.
  - The average time that the suggested contacts use to resolve similar cases.

- Agents can hover over the confidence score to view the details.





- The default AI-suggested contacts list shows the top three suggestions. If more contacts are suggested, agents can select **View more** in the dropdown list.

2. Type a participant name or select from the suggested contacts. You can select more than one contact and then select **Start chat**.

3. Optionally, you can edit the group name.

If the Teams chat is created for an active case, the participants who receive the chat message get a link to the case record for which you started the chat. The participant can select the link and open the case to view the details.

See also

View AI-suggested cases and knowledge articles
Overview of Customer Service workspace
Use Microsoft Teams chat in Sales Hub

View and share auto-summarized conversations

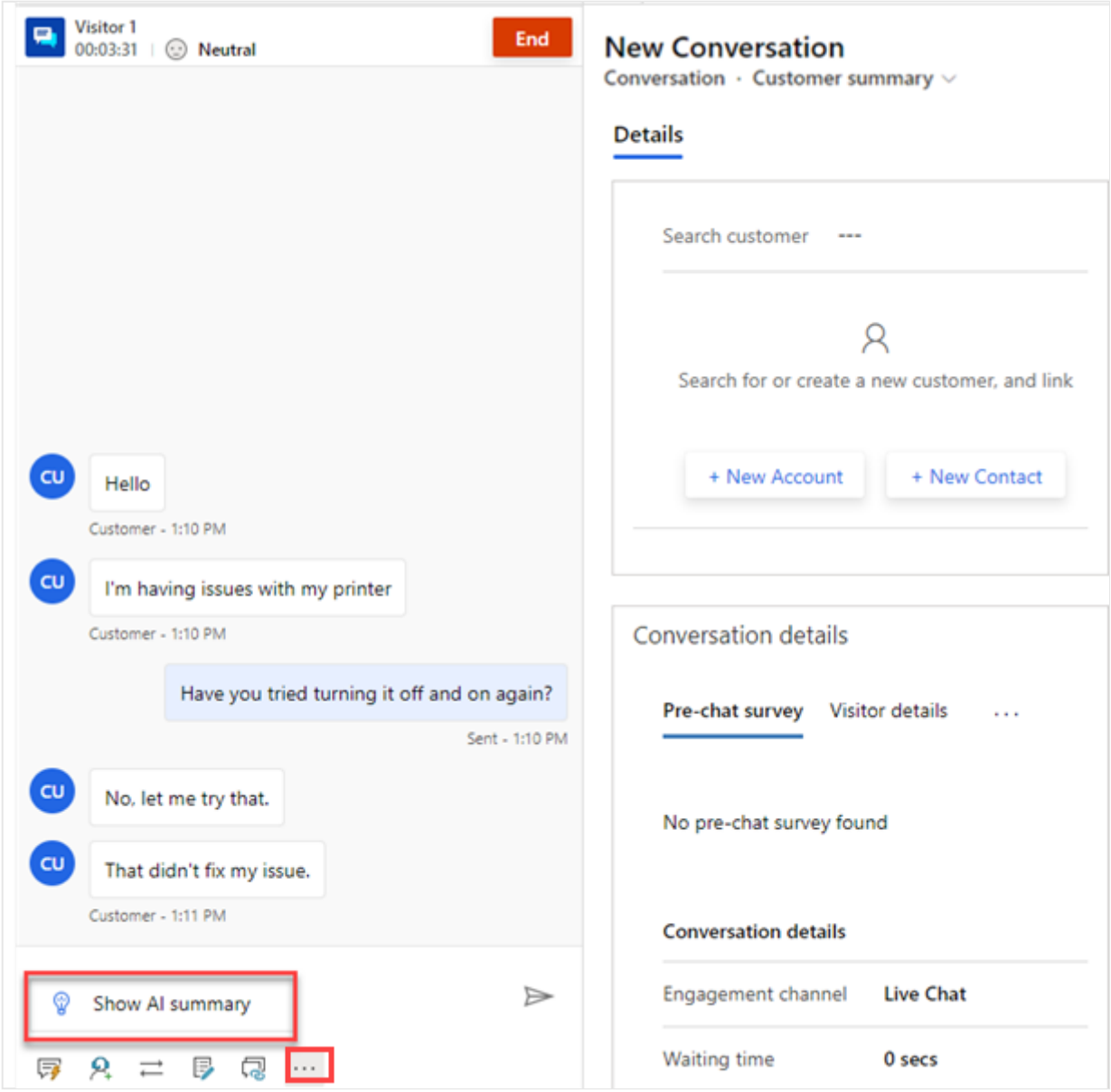
Article • 04/05/2023

Share an AI-generated summary of a customer conversation to easily collaborate on a case. A summary quickly provides context and relays steps that you've already taken to solve the issue. You can summarize all conversations that take place on messaging channels such as Live Chat, SMS, or WhatsApp. This feature also supports bot to agent conversations, voice conversations with transcription enabled, and Microsoft Teams conversations.

View and share a conversation summary for conversations

When you're working on a conversation request from a customer, select **Show AI summary**.

> **Note**
>
> You won't see a summary if the conversation doesn't include at least three messages from the customer.



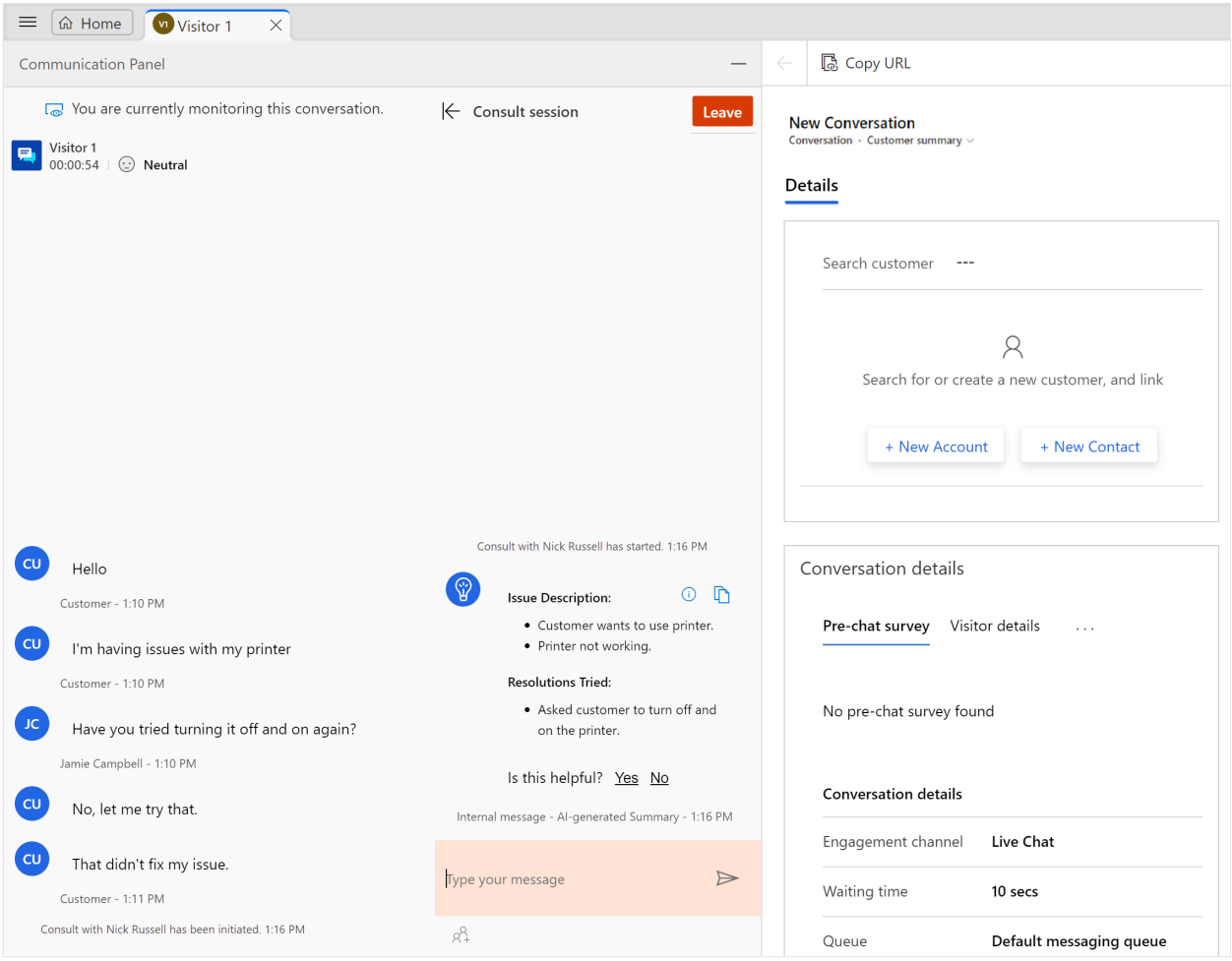
Only the agent can see the summary. The summary includes the following components:

- **Issue description**: Summarizes the key customer problems to solve in a conversation. The model needs at least three customer messages to generate the issue description.
- **Resolution tried**: Summarizes any troubleshooting steps or possible solutions that agents have tried. If the model can't identify a resolution from the transcript, this section is blank. If the case is resolved or the conversation ends, the application displays this label as **Resolution**.

You can also perform the following actions:

- Copy the summary from the card
- Select **Create a case**. The application creates a new case and populates the case description with the summary.
- Share feedback about the summary.

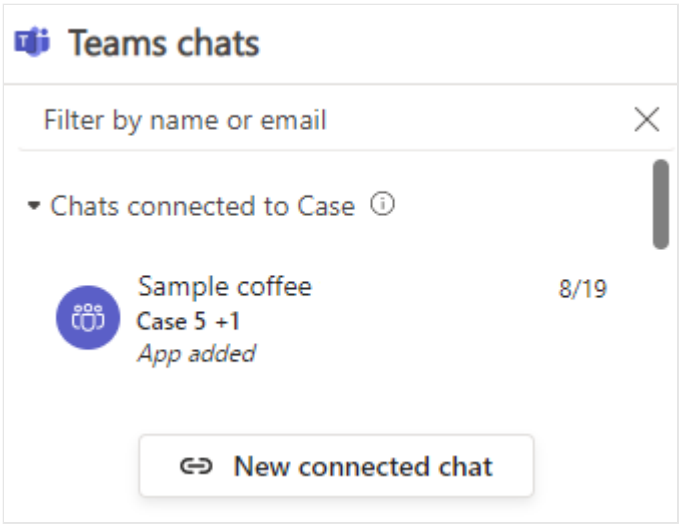
Based on the triggers enabled by your administrator, the application automatically generates and displays the summary when you request a consultation with another agent, transfer the conversation, or end the conversation.



View and share a conversation summary in Teams chat

When you open a case or a conversation, the **Teams chats** pane appears on the right side of the case or conversation.

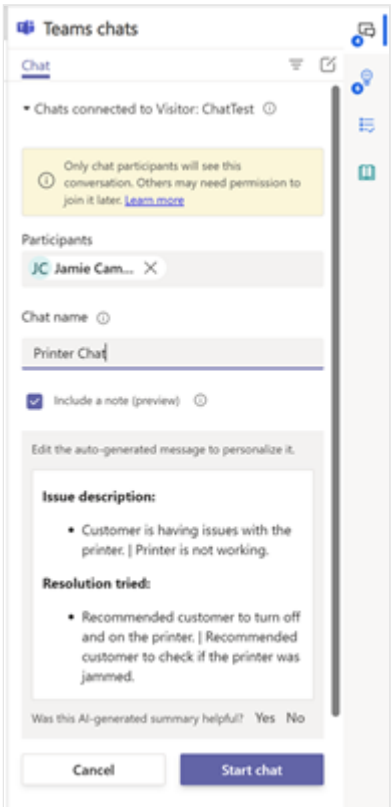
1. Select **New connected chat**.



2. Select a contact to start the chat with.
   If your administrator has turned on AI and rules-based suggestions, the system suggests contacts that you might want to chat with. They include contacts who have experience resolving similar cases or who are related to the current case. You can select more than one contact if you want to start a group chat.

   Before you start the chat, you can:

   - Edit the summary to provide more details.
   - Share feedback about the auto-generated summary. This helps the AI model summarize the conversations better.
   - Clear the **Include a note** checkbox to skip including the summary and start the Teams chat without the summary.



3. Select **Start chat**.

See also

Set up AI-generated conversation summary in Dynamics 365 Customer Service
View and understand call summary page in the Sales Hub app

Use Join a Teams call to enhance your conversations with customer (preview)

Article • 10/02/2023

> **ⓘ Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Join a Teams call is a new way for you to have effective conversations with your customers. During an active conversation, you can quickly move your call or chat to Microsoft Teams. On Teams, you can share your screen, connect on video, and cobrowse to offer more personalized support to your customer.

If you already have Teams, you don't need any other investments to use the Join a Teams call feature. Your customers don't need a Teams license or previous experience using Teams.

Prerequisites

Ensure that the following prerequisites are met:

- Your administrator must set up Teams for your account and enable the Join a Teams call feature.
- You must have a Teams license.
- To invite customers to Teams meetings via email, your email configuration must allow outbound mail.

Use Join a Teams call

You can use the Join a Teams call feature when you're in an active, ongoing conversation by doing the following steps:

1. On the productivity pane, select the **Join a Teams call** icon. The option to **Start a Teams meeting** is displayed with the customer's name.

2. Next to the customer's name, select either of the following options:

- Link icon: Generates a Teams meeting link and copies it to your clipboard so you can send it to the customer.
- Email icon: Autosends an email that contains a Teams meeting link to the email address in the customer record.

After the link is sent, the productivity pane displays a confirmation message and prompt for you to join the meeting, along with a timestamp of the meeting duration.

3. Select **Join call**. The link opens in a browser window and prompts you to open the Teams app if it's installed or continue your conversation with the customer in the web browser. If you disconnect from the meeting during the scheduled time, you can rejoin using the same link in the productivity pane. When the end time passes, you can create a new link and reinvite the customer.

> **Note**
>
> Once you join the Teams meeting, if you were on a voice call with the customer, you must manually end your call. Joining the Teams meeting with the customer doesn't automatically end your in-progress voice conversation.

How to use Join a Teams call with unknown customers

If you're in a conversation with an unknown customer whose record isn't displayed in Customer Service and you want to invite them to a Teams meeting, you must first locate or create their record.

To locate or create a customer record:

1. Do one of the following:

   - Search for the customer record: On the active conversation page, go to **Customer** > **Search for a customer** > type the name of the customer, and then select **Enter**. If the customer has a record, it appears and you can select it.
   - Create the customer record: If the customer doesn't have an existing record, you can create it: Go to **Customer** > **New record**, and then enter the customer's details.

2. Follow the steps in Use Join a Teams call to start the Teams meeting.

See also

Set up Join a Teams call
Use Teams chat in Customer Service

Use customer support swarming (preview)

Article • 07/11/2023

> **ⓘ Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

When you work on time-sensitive, complex customer issues, there are times when it's useful to apply the expertise of coworkers outside of your Dynamics 365 Customer Service team.

Customer support swarming is useful when you need to take the following actions:

- Collaborate with experts across your organization to get help on complex cases.
- Use an expert finder to quickly locate experts with the right skills to help.

Use customer support swarming to find the right set of experts to work with on your customer issues and collaborate with peers directly from your desktop.

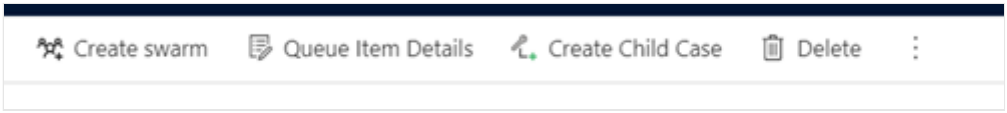
Prerequisites

To be able to create a swarm when working on a customer issue, you must have the following prerequisites in place.

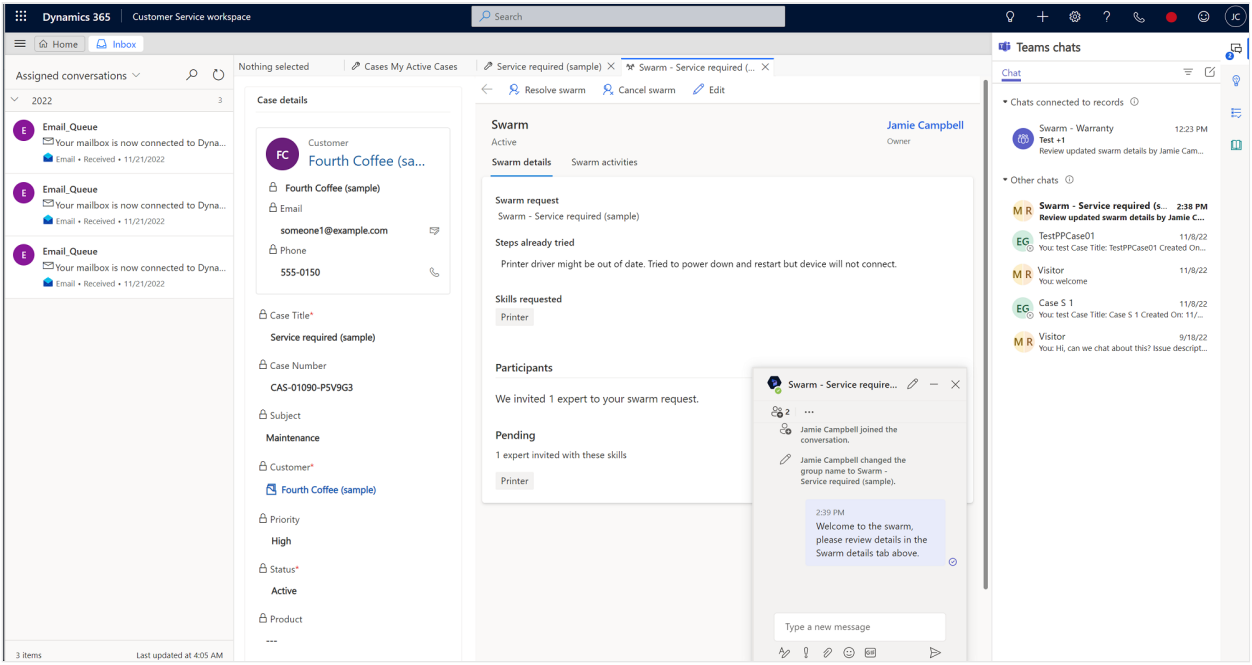
- If you're an agent, you must have both a Dynamics 365 Customer Service Enterprise license and Microsoft Teams license.
- If you're an expert joining a swarm, you must have a Teams license.
- Embedded Microsoft Teams chat must be enabled for the agent desktop or on the Teams web app.

Start a swarm

1. On the Customer Service command bar, select **Create swarm**. (You might need to select the ellipsis to see this option.)



The **Swarm** page opens with the **Case details** displayed on the left side pane. The case and account fields are read-only, and are designed to give other swarm participants the associated details about the case.



> **Note**
>
> If you don't see the **Create swarm** option, ask your administrator to assign access privileges for you.

1. On the **Swarm** form, type information into the following fields:

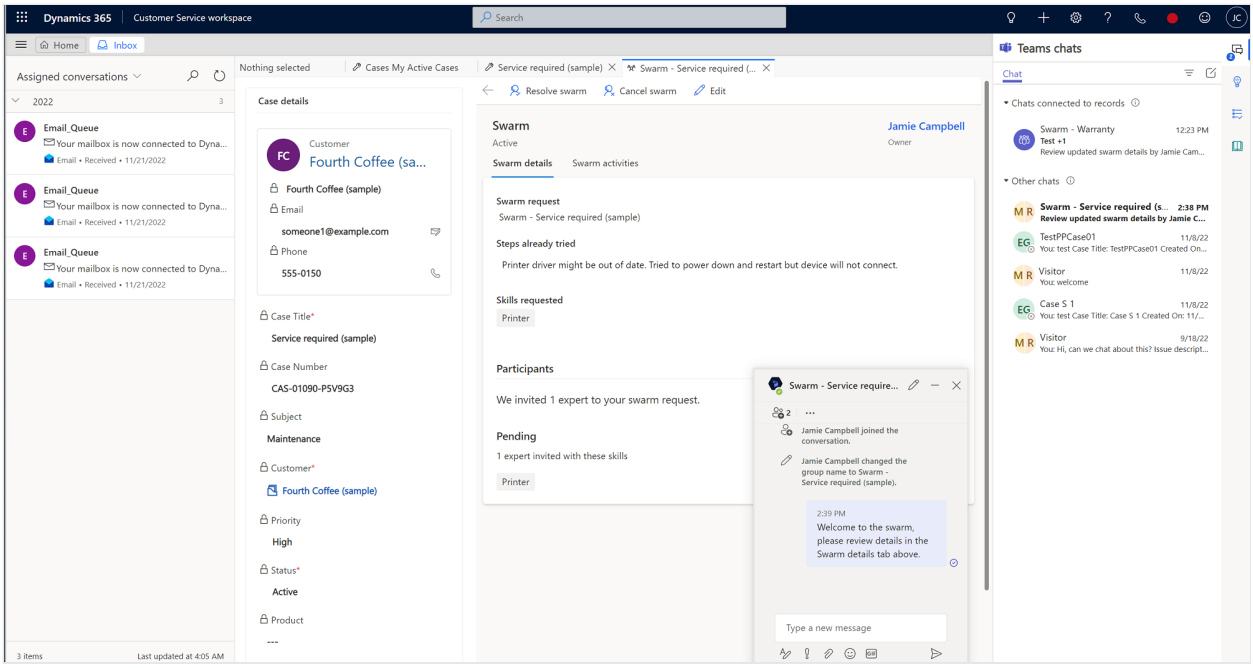
- **Swarm request**: The title of the swarm is displayed by default, but you can edit it if needed.
- **Steps already tried** (optional, 2,000-character limit): Type the details about steps you've already taken to try to resolve the issue, and any results. These details help confirm that any required processes have been followed, and also provides immediate context for other swarm participants who are invited to collaborate on the issue.
- **What skills do you need?** (optional): As part of the swarm request, the system takes the following actions:
  - Attempts to match skills based on your swarm question
  - Suggests skills based on rules your administrator has defined. These rules find the key word(s) that are present in the swarm request and/or steps that have already been tried, and then populates the matched skills based on the configured rules.

Suggested skills have the light bulb icon. You can also select up to 10 skills (both system-suggested and manually selected) that you think are relevant to the case. (Manually selected skills don't have the light bulb icon next to them.)

> ⓘ **Note**
>
> If neither the system nor you designate any skills, you can still create the swarm but no experts will be added. In this scenario, we recommend asking your supervisor for help with identifying the appropriate skills to get expert support.

2. Select **Save and send invitation**. A linked swarm chat is created, and the contacts configured by your administrator are automatically added to the chat. Once a swarm invitation has sent, you can still go back and edit the swarm details if needed.

> ⓘ **Note**
>
> By default, your supervisor is automatically added to create the swarm. If you don't have a supervisor, your administrator who configured the swarm is automatically added.



The following actions and views occur:

- The system finds the minimum set of experts needed to cover as many of the skills suggested or that you added as possible.
- A participants section opens, where you can see the number of experts invited to your swarm who match particular skills.
- You can view the names of skills not matched to an expert. If a skill is unmatched, you can work with your supervisor to find experts who match the skill.
- You can view names of automatically added participants in the chat window.
- When an invited expert accepts the swarm invitation, they're automatically added to the swarm chat.
- If you select **Edit** on the command bar, existing saved skills remain. If you edit the swarm request, then the following actions occur:
  - The system searches for skills to account for the newest information, and appends skills found to the existing ones.
  - Invited experts and experts who are already in the swarm remain.
  - A group chat is created, where you can chat with people who are experts on the issue. You might be the only one who is in the chat at first but you can message others to ask them to join if needed.

How the invitation to experts works

When you select an expert for your swarm, they're sent an automated invitation in Teams via an adaptive card. When they accept your invitation, they're attached to the swarm, and their skills are indicated. If the expert declines the invitation, the system then looks for the next expert or experts who have the needed skill(s).

For the invited expert, the swarm invitation shows the following information:

- Inviting agent: The agent who initiated the swarm and invited the expert.
- Swarm request: The question the agent needs help with.
- Steps the agent already tried: A brief description of what the agent has tried prior to creating the swarm.
- Expert skills: The required skills the expert has for the swarm.
- Accept and reject: Options for the expert to either join or decline the swarm. If an expert declines an invitation and then later decides they want to join, they can participate by asking you to add them manually. They aren't able to view the swarm form from the group chat.

When an expert joins a group chat, they see a read-only version of the **Swarm details** form added as a tab. The right-side pane displays the associated case details. The agent's swarm request and a summary of what the agent has tried to do to resolve the issue are displayed.

Experts who join a swarm can see all participants in the swarm and the skills they have that resulted in their invitation to the swarm.

Experts aren't required have access to Dynamics 365 to participate in swarms, but if they're able to access a swarm in Customer Service, they can go to the **Swarm activities** tab on the **Swarm** page, where they can view a timeline of all the key events that are related to the swarm.

Experts without a Dynamics 365 license can be invited to swarms in Teams. When they accept the invitation to join the swarm, a swarm chat appears in the **Chat** pane in Teams. The expert must select the chat to enter the swarm conversation. Both the agent and the expert can add others to the chat if needed. The agent can interact with the expert and add notes of their interaction to the swarm timeline.

Create a task in the timeline

If there are details that you or your swarm experts want to document or update in the future, you can create a task with an optional due date that appears in the swarm timeline and also in the Teams chat.

To create a swarm-related task, complete the following steps:

1. On the swarm page in Customer Service workspace, select the **Swarm activities** page.
2. In **Timeline**, select the **Add** (+) icon, and then select **Task** on the dropdown menu. The **Quick Create: Task** pane opens on the right-hand side of the page.

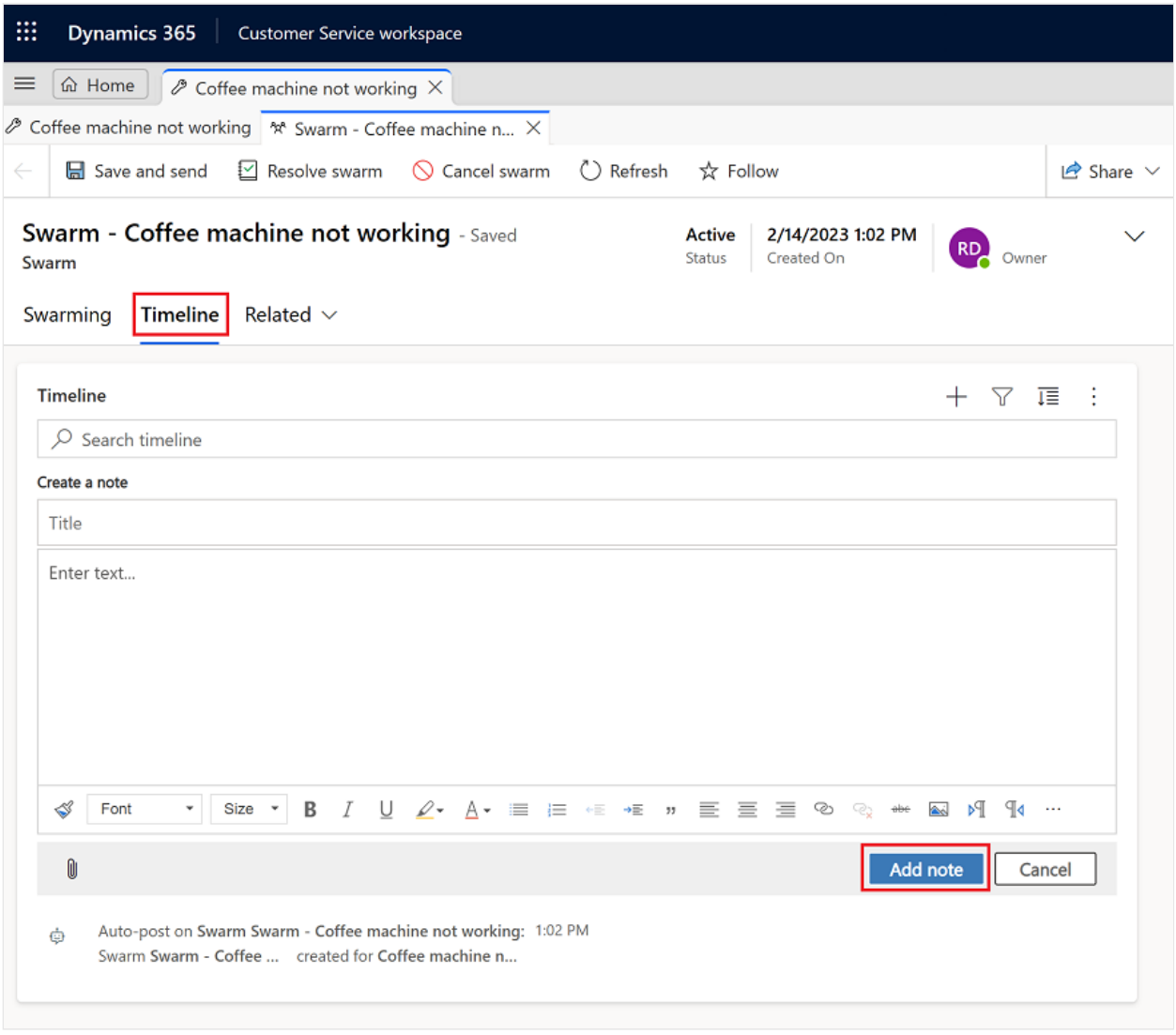
3. (Optional) In the **Owner** field, as the creator of the task, you're listed by default. You can add others if desired by typing their names.
4. (Optional) Enter a **Description** of what you need to do.
5. (Optional) Enter a **Due** date.
6. Specify the **Duration** and **Priority** details.
7. When finished, select **Save and Close**.

A Dynamics 365 bot autoposts a link to the task in the Teams chat.

Create a note in the timeline

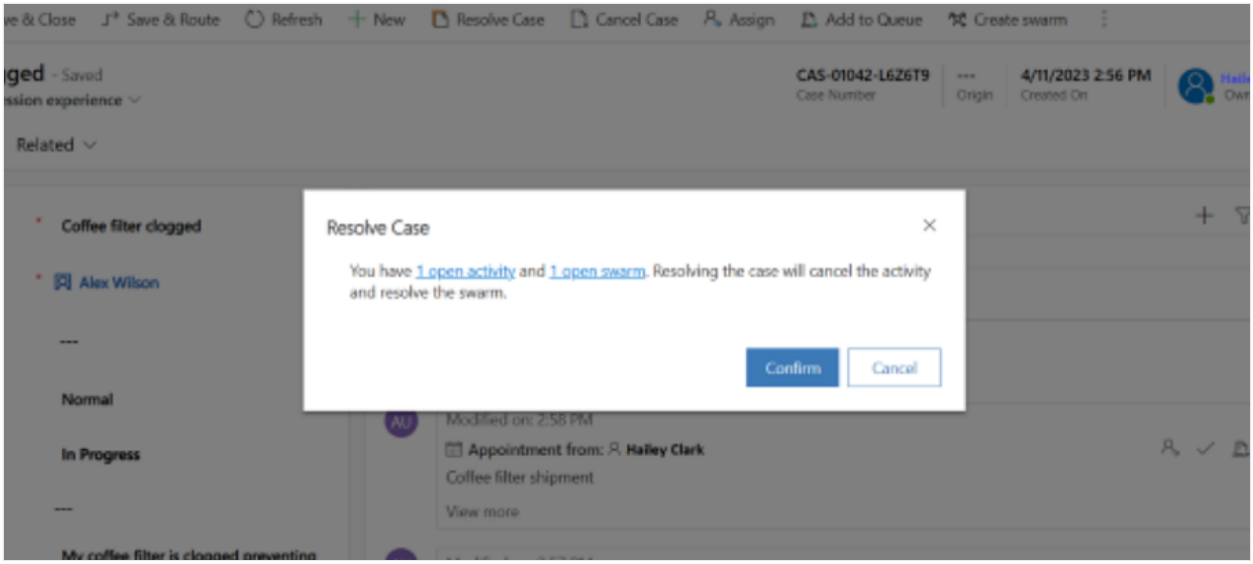
You can create notes that include specific details that appear in the swarm timeline and also in the Teams chat.

1. In **Timeline**, select the **Add** (+) icon, and then select **Note** on the dropdown menu. The **Quick Create: Note** pane opens on the right-hand side of the page.
2. Type a **Title** for the note.
3. In the rich text editor, add details.
4. When finished, select **Save and Close**.



Case closure and swarm resolution

When you close a case, either by resolving or canceling it, links to any open swarms that are associated with the case are displayed. You can choose to close or cancel those swarms by selecting the links. If you confirm, the relevant swarms are resolved. If you select cancel, you're returned to the case form.

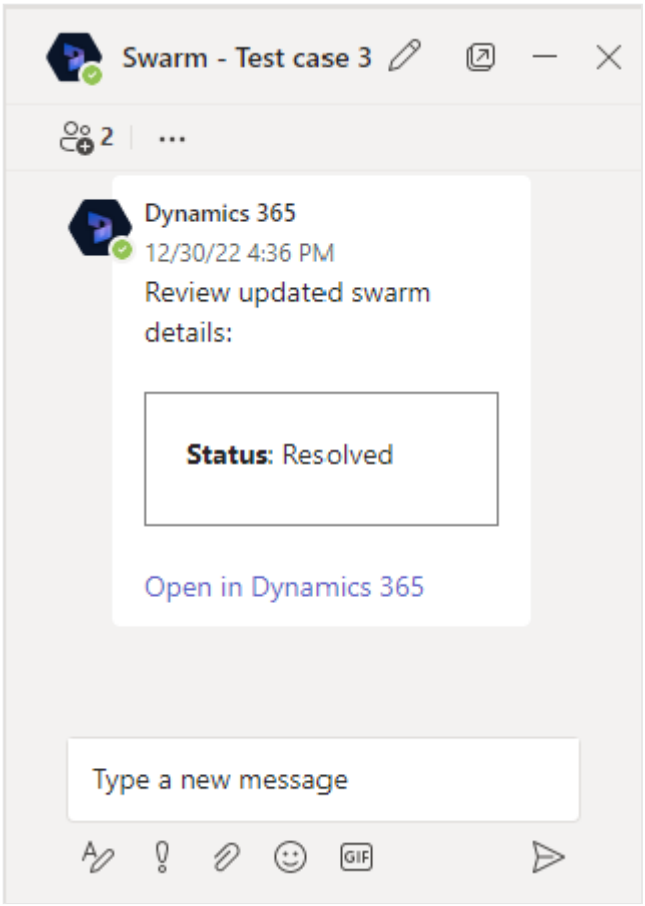


Resolve a swarm session

When a swarm has completed, you can close it by completing the following steps:

1. On the **Swarm** page in Customer Service workspace, select **Resolve swarm**.
2. (Optional): In the **Resolve this swarm?** dialog box, enter details that describe the solution.
3. Select **Resolve swarm**.

After the swarm is resolved, a Dynamics 365 bot posts to the Teams chat to indicate that the swarm has been resolved with a link to the swarm details in Dynamics 365.



Reactivate a swarm

You can reactivate a swarm by completing the following steps:

1. In Customer Service workspace, on the sitemap, select **Swarms** in **Service**.
2. On the **Swarm** page, from the dropdown list, select **All swarms**, and then select the swarm you want to reactivate.
3. On the **Case details** page, select **Reactivate swarm**.

After the swarm is reactivated, a Dynamics 365 bot posts to the Teams chat to indicate that the swarm has been reactivated with a link to the swarm details in Dynamics 365.

Cancel a swarm

You can cancel a swarm that's in progress by completing the following steps:

1. In Customer Service workspace, on the sitemap, select **Swarms** in **Service**.
2. On the **Swarm** page, select **Active swarms** from the dropdown menu, and then select the swarm you want to cancel.
3. On the **Case details** page, select **Cancel swarm**.
4. On the **Cancel this swarm?** dialog, select the reason you want to cancel the swarm from the dropdown list, and then select **Cancel swarm**.

After the swarm is canceled, a Dynamics 365 bot posts to the Teams chat to indicate that the swarm has been canceled with a link to the swarm details in Dynamics 365.

View associated swarms

You can see the swarms that are associated with a case from the record. To view the associated swarms, in Customer Service workspace, go to the **Details** tab, and then view the **Associated swarms** card.

Swarm views

To view a list of swarms, go to **Swarms** on the site map. The following views are available:

- All swarms
- Canceled swarms
- My active swarms
- Resolved swarms
- Swarms being followed
- Swarms I follow

See also

Configure customer support swarming
Configure Teams chat
Use Teams chat

Share and update Dynamics 365 records within Microsoft Teams conversations (production-ready preview)

Article • 06/20/2022

Important

- This topic is prerelease documentation and is subject to change.
- Preview features designated as production-ready employ privacy and security measures typically present in generally available features, as further explained in our **preview terms**.

When having a conversation with other people over Teams, you might want to share Dynamics 365 records with them within a Teams chat or a channel. You can do this by using the Dynamics 365 app. The Dynamics 365 app allows you to search for information in Dynamics 365, share with other participants in their chats or channels, and even allow them to perform tasks from within the Teams chat conversation. Using the Dynamics 365 app, you can:

- Send a quick summary of a record in a Microsoft Teams chat or channel as an interactive card.
- Search for and filter Dynamics 365 records to share with your conversation participants.
- Paste the URL of a Dynamics 365 record and have it rendered as an interactive card.
- Edit records through interactive cards.
- Add chat conversations as notes and tasks with the click of a button.

Note

The functionality of sharing Dynamics 365 records in Teams is not supported on mobile devices.

The information in the interactive card is displayed using the view of type **Quick Find View** of a table. To change the information displayed in the cards, admins can edit the

columns in the **Quick Find View** view of a table as per the requirement.
https://www.microsoft.com/en-us/videoplayer/embed/RE4XVnt?postJsllMsg=true

See also

Enable sales teams to work with Dynamics 365 records within Microsoft Teams conversations
Access the Dynamics 365 app through messaging extensions
Edit settings of the Dynamics 365 app
Share feedback
Share Dynamics 365 records within Microsoft Teams conversations
View and update record details
Add chat messages to Dynamics 365 as notes or tasks

Access the Dynamics 365 app through messaging extensions (production-ready preview)

Article • 08/10/2022

> **Important**
>
> This topic is pre-release documentation and is subject to change.

If you've already added the Dynamics 365 app to Microsoft Teams, proceed with the Access the Dynamics 365 app section. If you haven't added the app to Microsoft Teams, proceed with the Add the Dynamics 365 app section.

License and role requirements

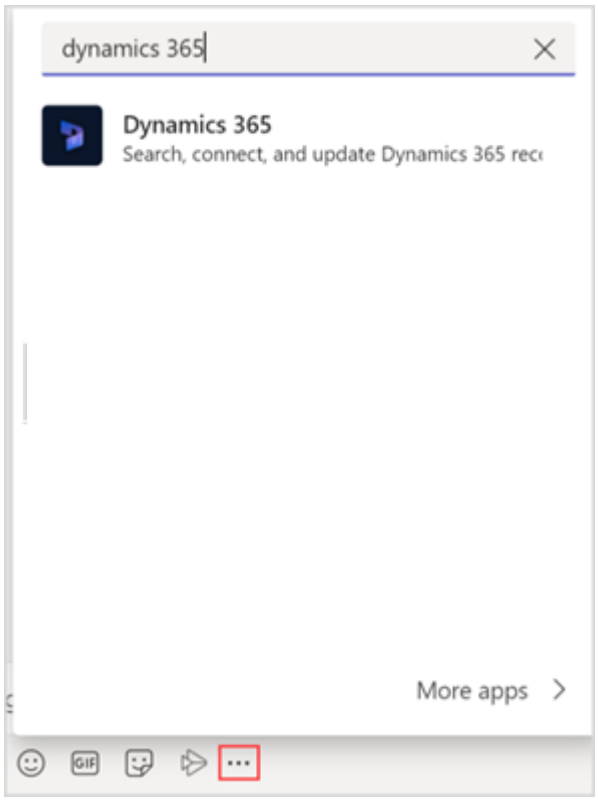
Requirement type	You must have
License	• Dynamics 365 Sales Premium, Dynamics 365 Sales Enterprise, Dynamics 365 Sales Professional, Dynamics 365 Team Members, or any Dynamics 365 customer engagement app license • Microsoft Teams license More information: • Dynamics 365 Sales pricing • Microsoft Teams pricing • Dynamics 365 Team Members • Dynamics 365 Licensing Guide
Security roles	• Any primary sales role, such as salesperson, or sales manager • Any role that has access to a Dynamics 365 record More information: Primary sales roles

Add the Dynamics 365 app

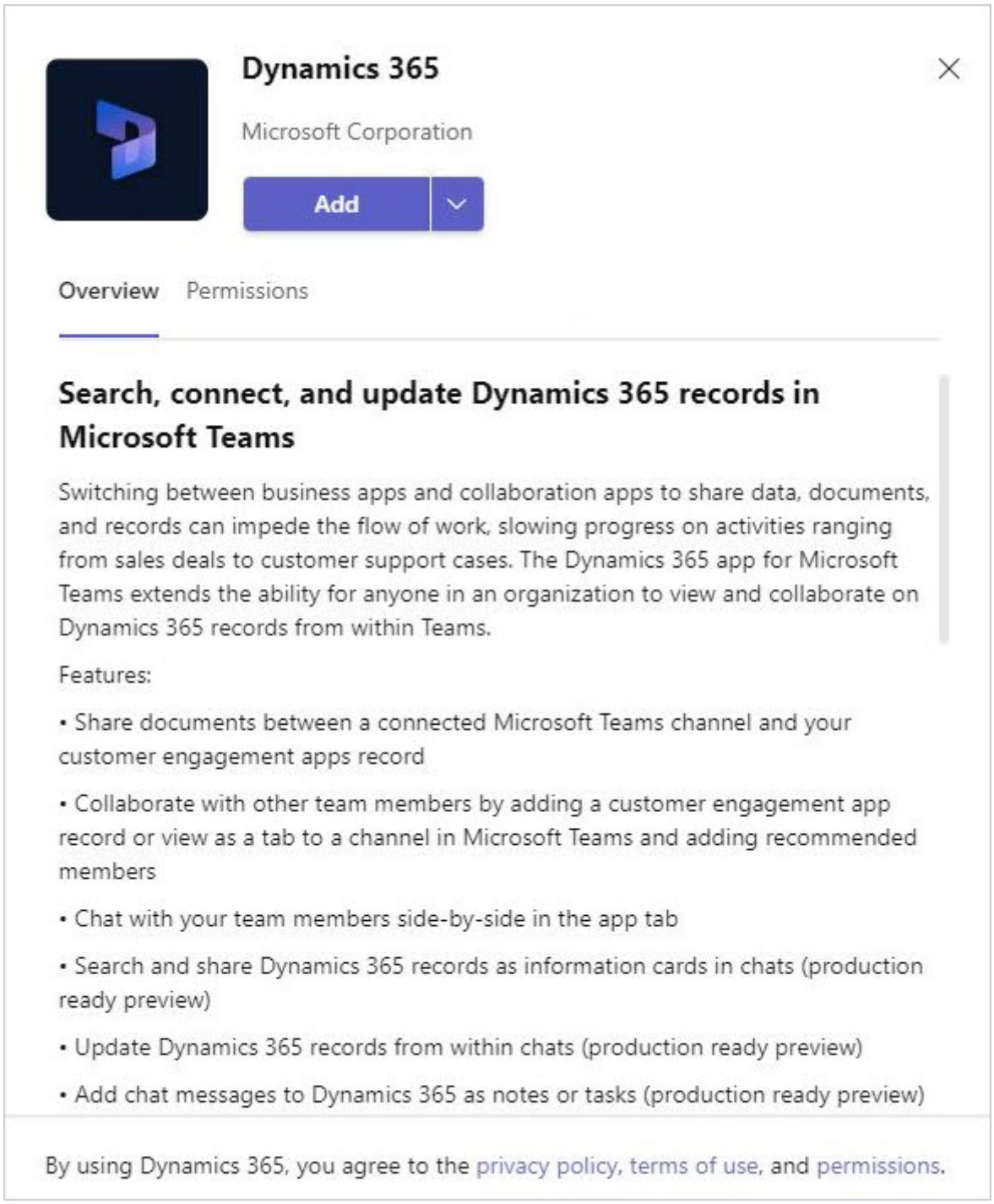
1. Open a channel in Teams and select **New conversation**.

Alternately, open any chat conversation with a person or group.

2. Select **Messaging extensions** (...) on the command bar, search for **Dynamics 365**, and select it.



3. Select **Add** in the Dynamics 365 window.



The app is added to the channel or a chat conversation in Teams.

> **Note**
>
> Once you install the app for one channel or chat, it's available for use in all other channels and chats.

Access the Dynamics 365 app

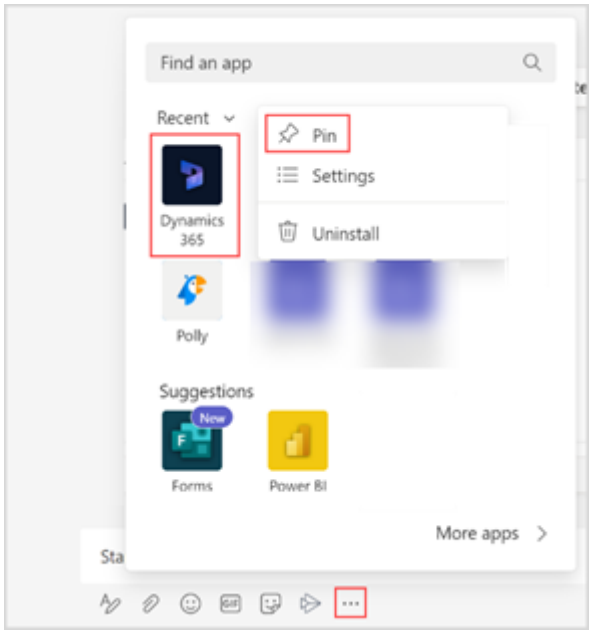
After the Dynamics 365 app is added to a channel, it's available through messaging extensions in Teams.

1. In Teams, open the channel to which you added the Dynamics 365 app and select **New conversation**.

   Alternately, open the chat conversation with a person or group to which you added the Dynamics 365 app.

2. Select the Dynamics 365 icon ( ) on the command bar.

   If you don't find the Dynamics 365 icon ( ) on the command bar, select the **Messaging extensions (...)** icon on the command bar, search for the **Dynamics 365** app, right-click and then select **Pin**.

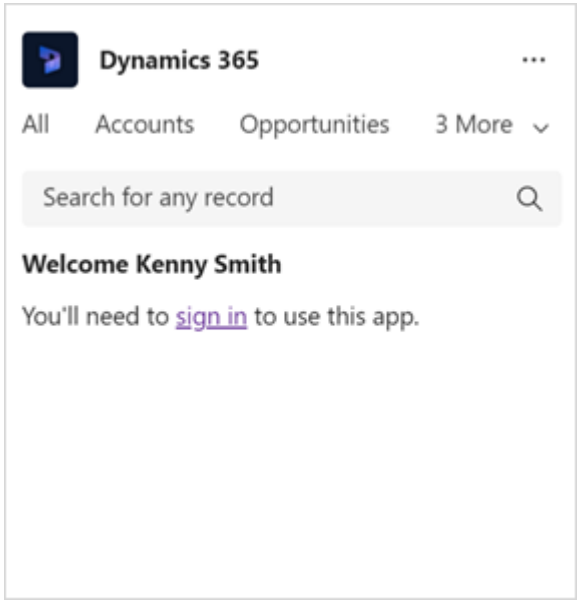


   The Dynamics 365 app icon is pinned to the command bar.

Set up the Dynamics 365 app

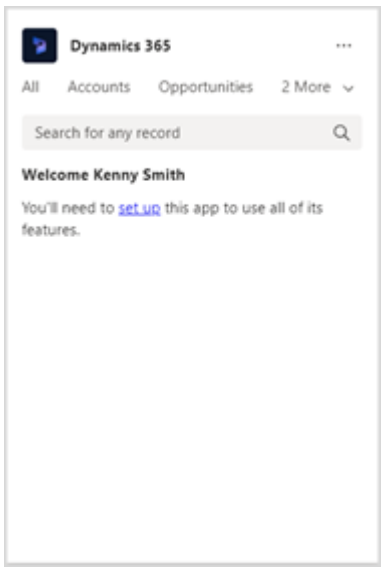
1. Access the Dynamics 365 app.

2. In the **Dynamics 365** window, select **sign in**.



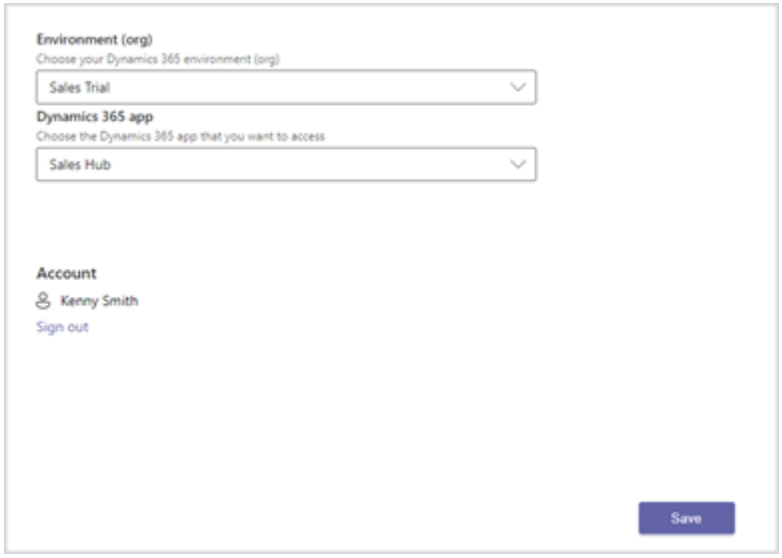
3. After you sign in to the app, select **set up**.

> **Note**
>
> You'll see this step only if you are using the Dynamics 365 app in Teams for the first time. Otherwise, you'll be taken to the next step to select an environment and an app.



4. In the browser window that opens, provide the following information:

   - **Environment (org)**: Select an environment that you want to connect to.
   - **Dynamics 365 app**: Select an app that you want to share records from.



5. Select **Save**.

After you've set up the app, you can change the settings later as required. More information: Edit settings of the Dynamics 365 app

See also

Share and update Dynamics 365 records within Microsoft Teams conversations
Edit settings of the Dynamics 365 app
Share feedback
Share Dynamics 365 records within Microsoft Teams conversations
View and update record details
Add chat messages to Dynamics 365 as notes or tasks

Edit settings of the Dynamics 365 app (production-ready preview)

Article • 08/10/2022

> **Important**
>
> This topic is pre-release documentation and is subject to change.

This article provides information on how to edit settings of the Dynamics 365 app.

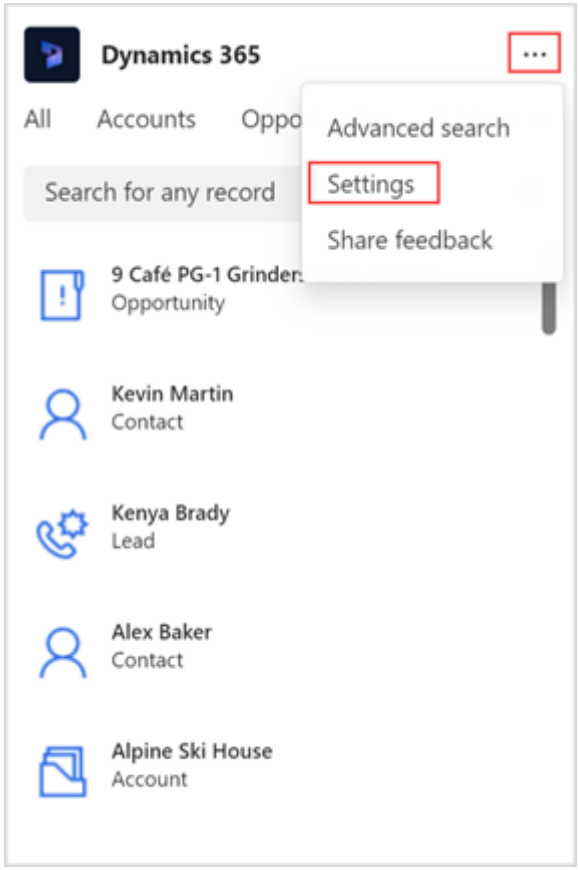
License and role requirements

Requirement type	You must have
License	• Dynamics 365 Sales Premium, Dynamics 365 Sales Enterprise, Dynamics 365 Sales Professional, Dynamics 365 Team Members, or any Dynamics 365 customer engagement app license • Microsoft Teams license More information: • Dynamics 365 Sales pricing • Microsoft Teams pricing • Dynamics 365 Team Members • Dynamics 365 Licensing Guide
Security roles	• Any primary sales role, such as salesperson, or sales manager • Any role that has access to a Dynamics 365 record More information: Primary sales roles

Edit settings

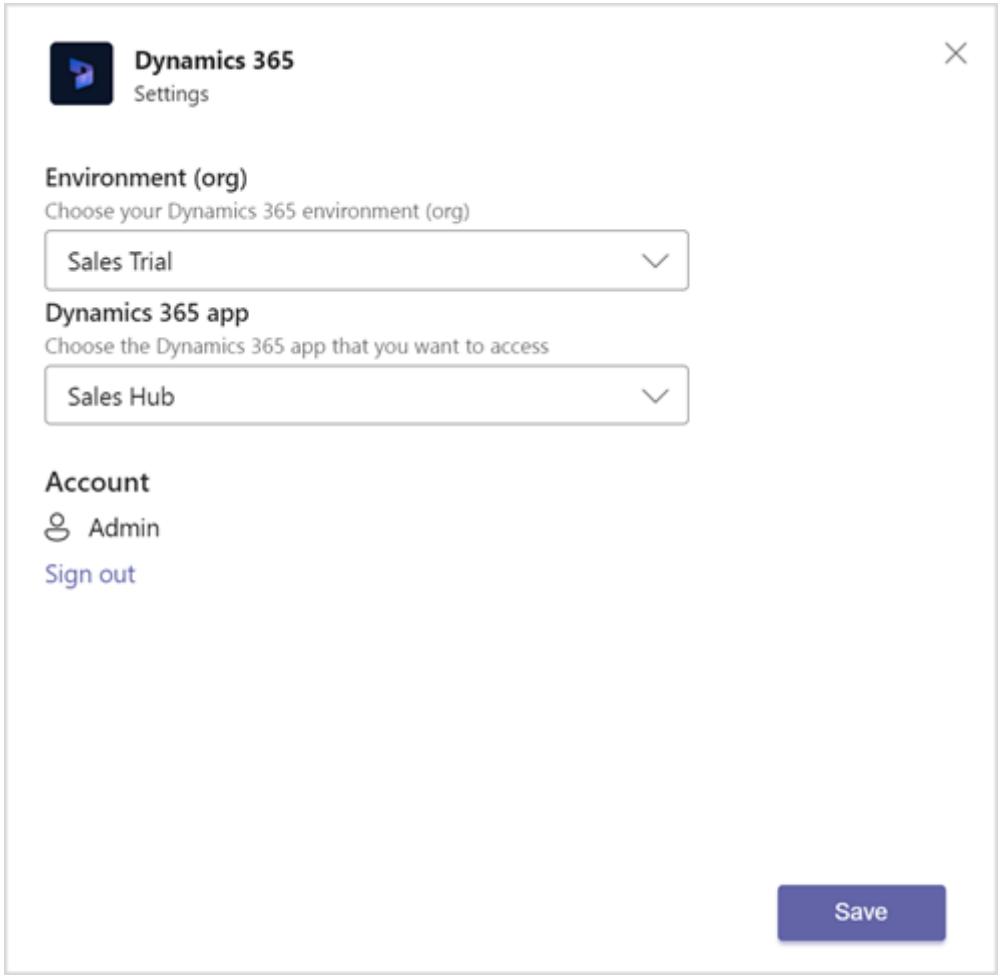
1. Access the Dynamics 365 app.

2. Select **Action Commands** (...) in the upper-right corner, and then select **Settings**.



3. In the **Settings** window, select the following information:

    - **Environment (org)**: Environment that you want to connect to.
    - **Dynamics 365 app**: App that you want to share records from.



4. Select **Save**.

See also

Share and update Dynamics 365 records within Microsoft Teams conversations
Access the Dynamics 365 app through messaging extensions
Share feedback
Share Dynamics 365 records within Microsoft Teams conversations
View and update record details
Add chat messages to Dynamics 365 as notes or tasks

Share feedback (production-ready preview)

Article • 08/10/2022

> **Important**
>
> This topic is pre-release documentation and is subject to change.

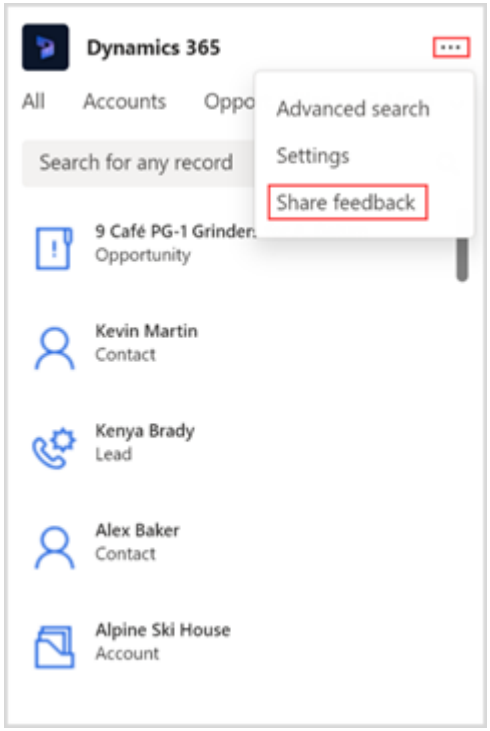
If you have any feedback about the Dynamics 365 app, you can share it from within the app.

License and role requirements

Requirement type	You must have
License	• Dynamics 365 Sales Premium, Dynamics 365 Sales Enterprise, Dynamics 365 Sales Professional, Dynamics 365 Team Members, or any Dynamics 365 customer engagement app license • Microsoft Teams license More information: • Dynamics 365 Sales pricing • Microsoft Teams pricing • Dynamics 365 Team Members • Dynamics 365 Licensing Guide
Security roles	• Any primary sales role, such as salesperson, or sales manager • Any role that has access to a Dynamics 365 record More information: Primary sales roles

How to share feeback

1. Access the Dynamics 365 app.
2. Select **Action Commands** (...) in the upper-right corner, and then select **Share feedback**.



3. Enter your responses in the survey and then submit it.

See also

Share and update Dynamics 365 records within Microsoft Teams conversations
Access the Dynamics 365 app through messaging extensions
Edit settings of the Dynamics 365 app
Share Dynamics 365 records within Microsoft Teams conversations
View and update record details
Add chat messages to Dynamics 365 as notes or tasks

Share Dynamics 365 records within Microsoft Teams conversations (production-ready preview)

Article • 08/10/2022

> **Important**
>
> This topic is pre-release documentation and is subject to change.

Discussing a particular opportunity on Teams? Share the record of the chat conversation and let participants view it without navigating away from Teams. You can share any Dynamics 365 record on Teams channels and chat conversations.

License and role requirements

Requirement type	You must have
License	• Dynamics 365 Sales Premium, Dynamics 365 Sales Enterprise, Dynamics 365 Sales Professional, Dynamics 365 Team Members, or any Dynamics 365 customer engagement app license • Microsoft Teams license More information: • Dynamics 365 Sales pricing • Microsoft Teams pricing • Dynamics 365 Team Members • Dynamics 365 Licensing Guide
Security roles	• Any primary sales role, such as salesperson, or sales manager • Any role that has access to a Dynamics 365 record More information: Primary sales roles

Share a Dynamics 365 record through search

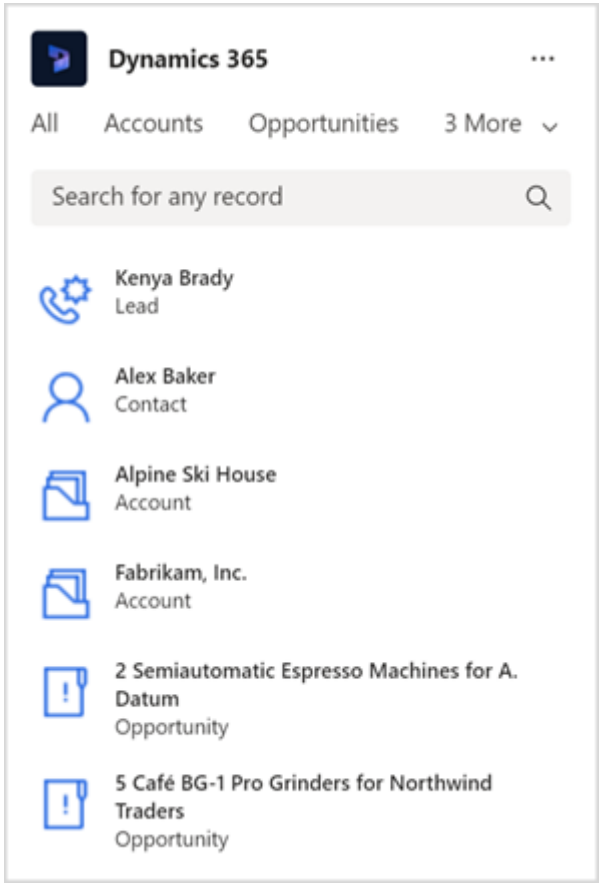
As a sender, you can share records using search in the app. The search displays the record name and the table type in the search results. However, if you want to search records as per a table type and preview a record in the search results, you must use the advanced search functionality.

> ⓘ **Note**
>
> You can also share a record by typing `@Dynamics 365` followed by a message to the Dynamics 365 app during a Teams conversation. The app allows you to search for the record and then it shares the record on your behalf in the Teams conversation. For example, if you type `@Dynamics 365, help me find the Alpine deal`, the app responds with a message to search for the record. You can then search for the record and share it.

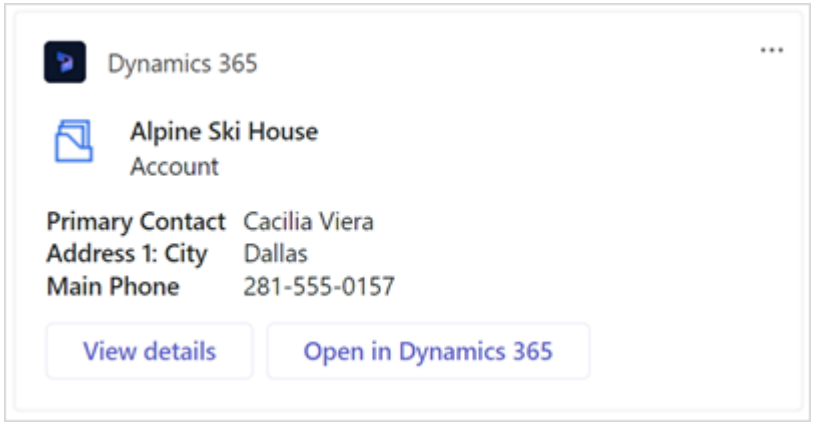
To share a record using search:

1. Go to the new or an existing conversation in which you want to share a record, and then open the Dynamics 365 app.
2. In the **Dynamics 365** window, search for the record to share, and then select it to share as a card on the chat.

   > ⓘ **Note**
   >
   > - By default, the recently accessed records are displayed, without performing any search. You can either search for the record or use the record type tabs available above the search field to search for a particular record type.
   > - The **All** tab allows you to search for all table type (out-of-the-box and custom) records. Other tabs are specific to a table type and allow you to search for that record type.

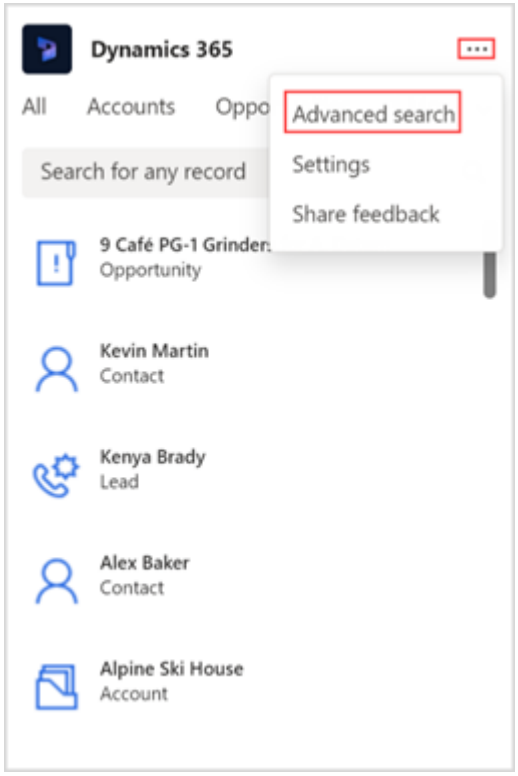


The selected record is shared on the Teams chat.



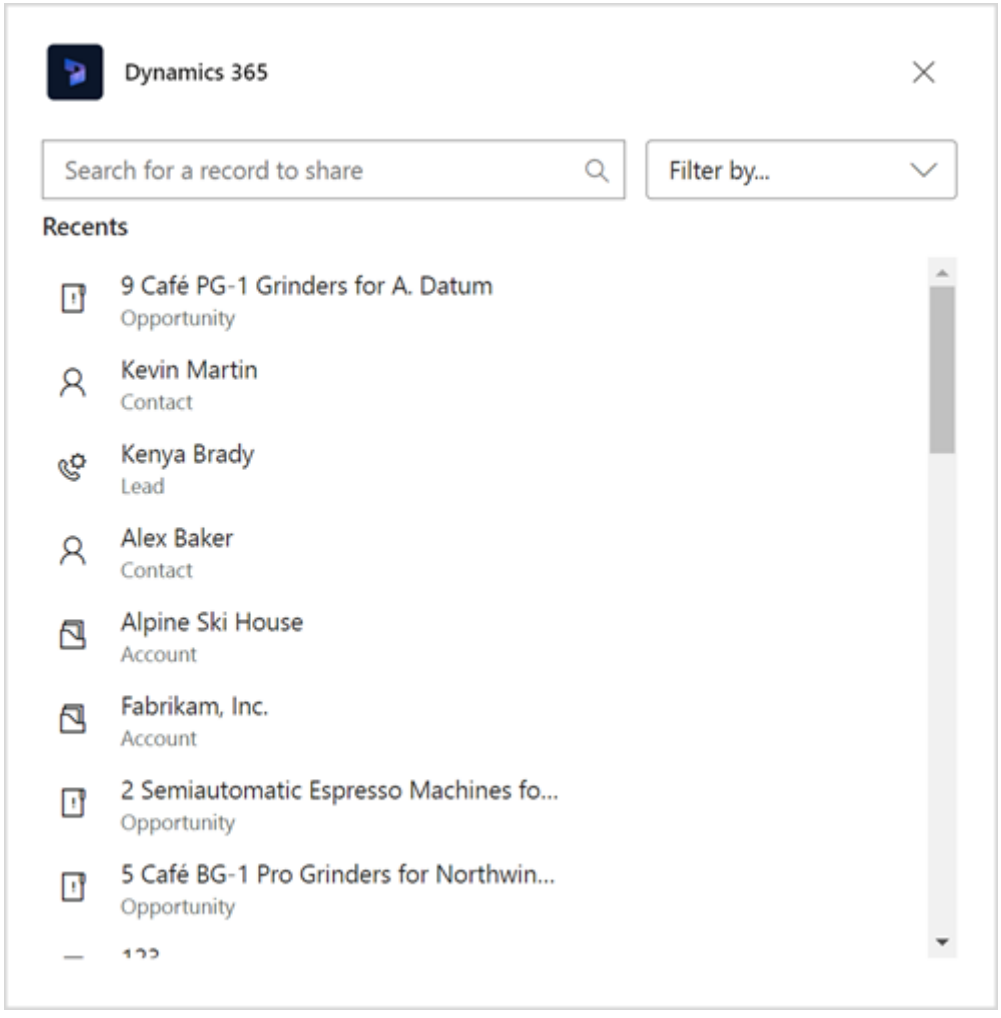
To share a record using advanced search:

1. Go to the new or existing conversation in which you want to share a record, and then open the Dynamics 365 app.
2. Select **Action Commands** (...) in the upper-right corner, and then select **Advanced search**.

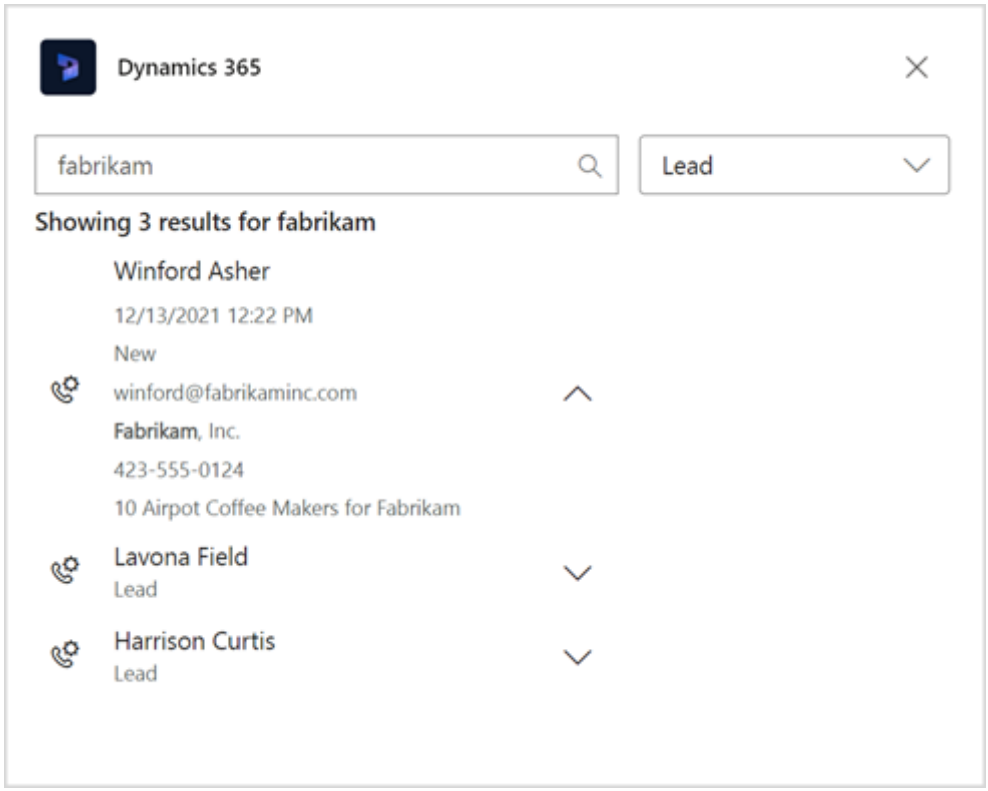


3. In the **Advanced search** window, enter or select the following values:

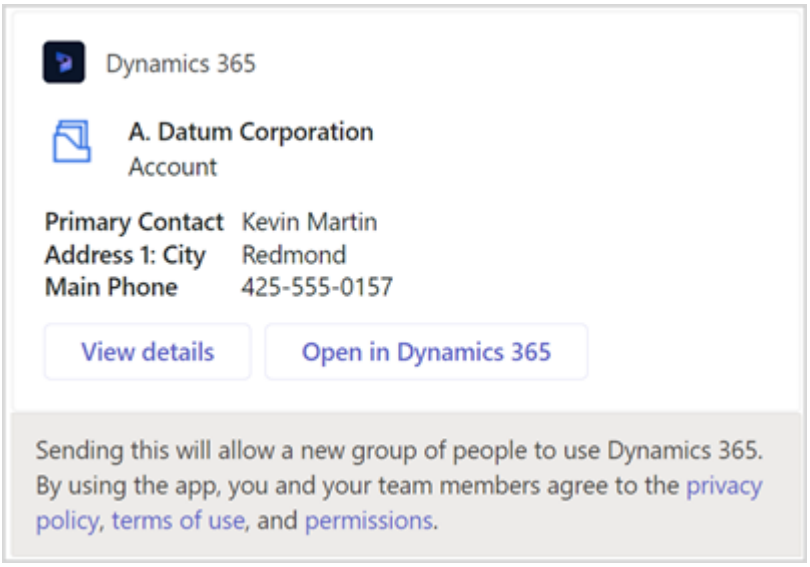
   - **Search for a record to share**: Name of the record to share.
   - **Filter by**: Record type to search for.



4. From the results, preview a record by selecting the down arrow next to the record name. Select a record to share it as a card on the chat.



If you see a disclaimer while sharing a record over Teams, it means that the app isn't yet added for that conversation or team.

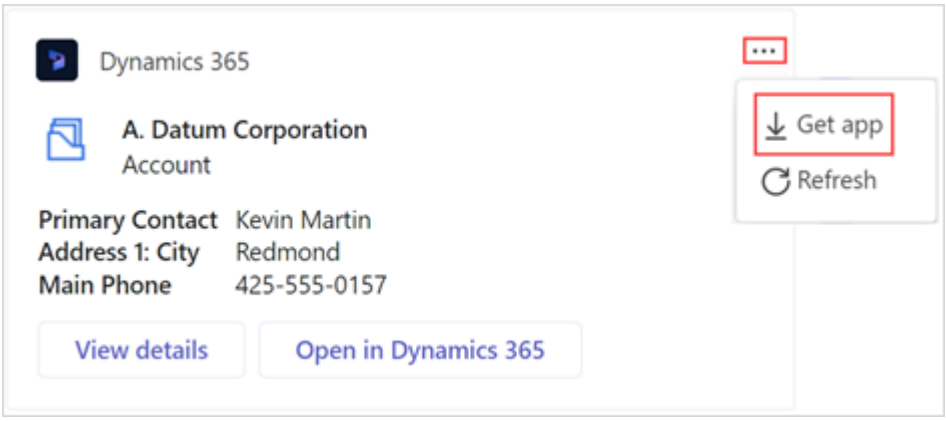


You can still share the record over Teams. The recipients must add the Dynamics 365 app to their Teams.

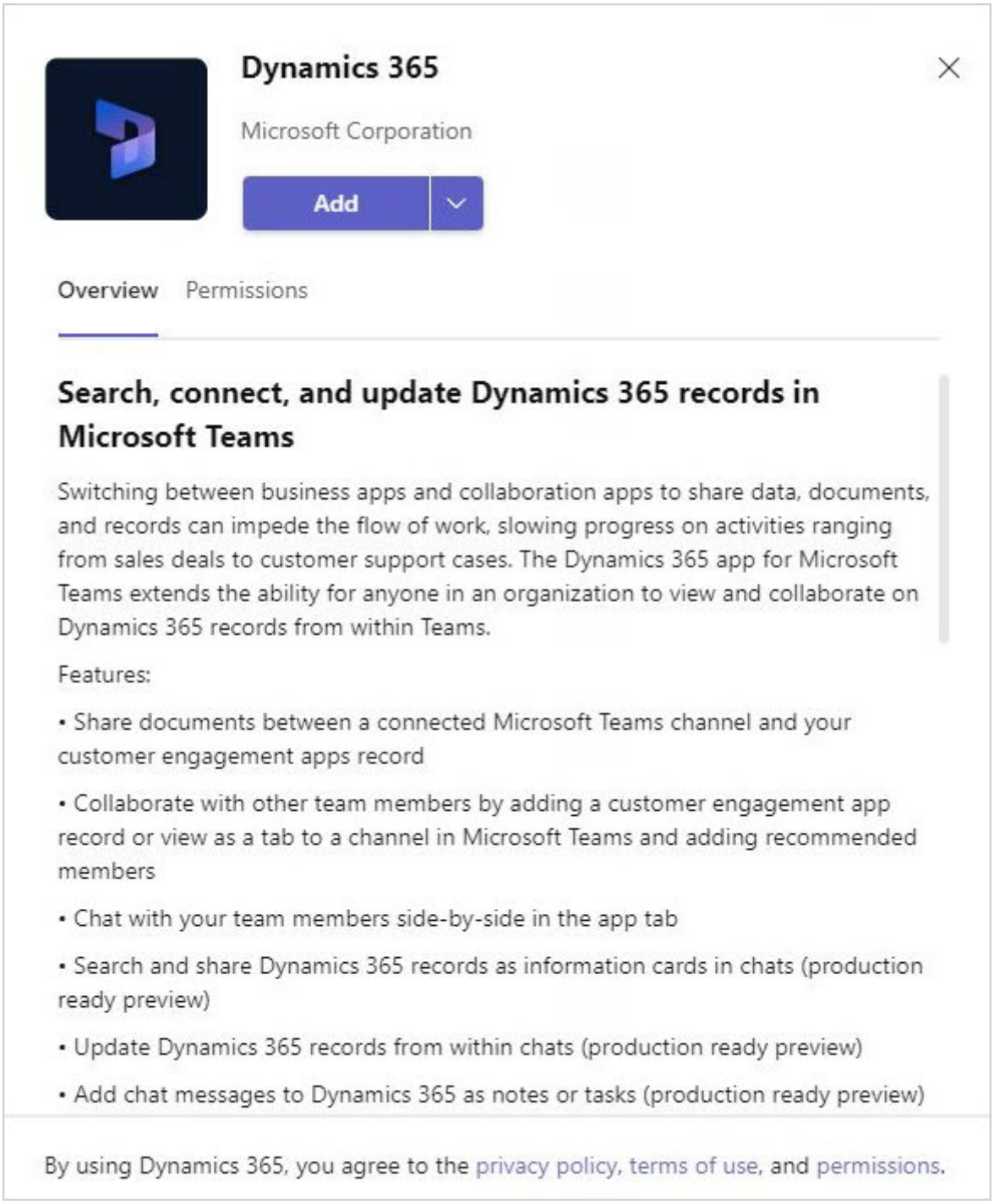
Each person in the team must add the Dynamics 365 app to their personal scope. To add the Dynamics 365 app:

1. Select **View details** on the card.

Alternately, hover over the card, select **More options** (...), and then select **Get app**.



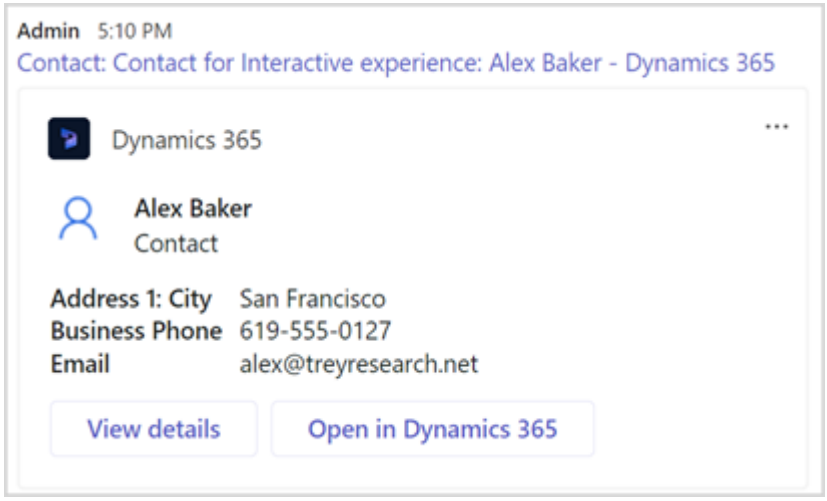
2. Select **Add** in the Dynamics 365 window.



Share a record through URL

You can also share a record by pasting the URL of a Dynamics 365 record. You can get the URL of a record from the web browser.

The record is displayed as an information card with actions.



See also

Share and update Dynamics 365 records within Microsoft Teams conversations
Access the Dynamics 365 app through messaging extensions
Edit settings of the Dynamics 365 app
Share feedback
View and update record details
Add chat messages to Dynamics 365 as notes or tasks

View and update record details (production-ready preview)

Article • 08/10/2022

> **Important**
>
> This topic is pre-release documentation and is subject to change.

After you receive a card in a Teams chat, you can view its details and update them as required.

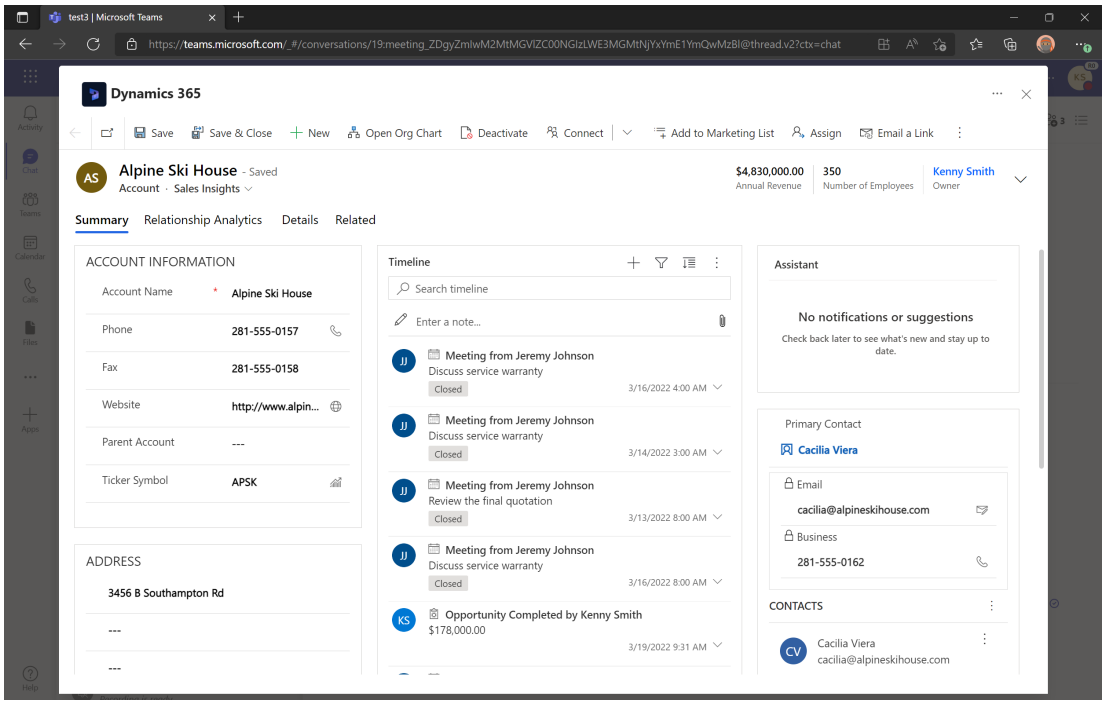
License and role requirements

Requirement type	You must have
License	• Dynamics 365 Sales Premium, Dynamics 365 Sales Enterprise, Dynamics 365 Sales Professional, Dynamics 365 Team Members, or any Dynamics 365 customer engagement app license • Microsoft Teams license More information: • Dynamics 365 Sales pricing • Microsoft Teams pricing • Dynamics 365 Team Members • Dynamics 365 Licensing Guide
Security roles	• Any primary sales role, such as salesperson, or sales manager • Any role that has access to a Dynamics 365 record More information: Primary sales roles

How to view and update record details

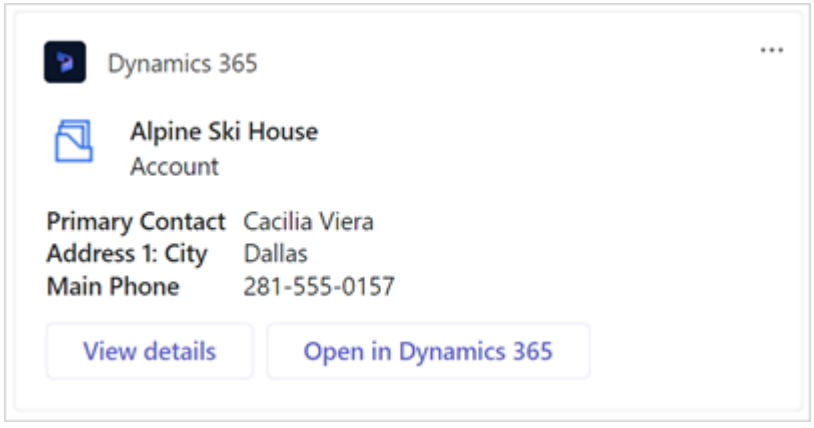
1. In a record card whose details you want to update, select one of the following:

   - **View details**: The record is opened in a new window inside Teams.



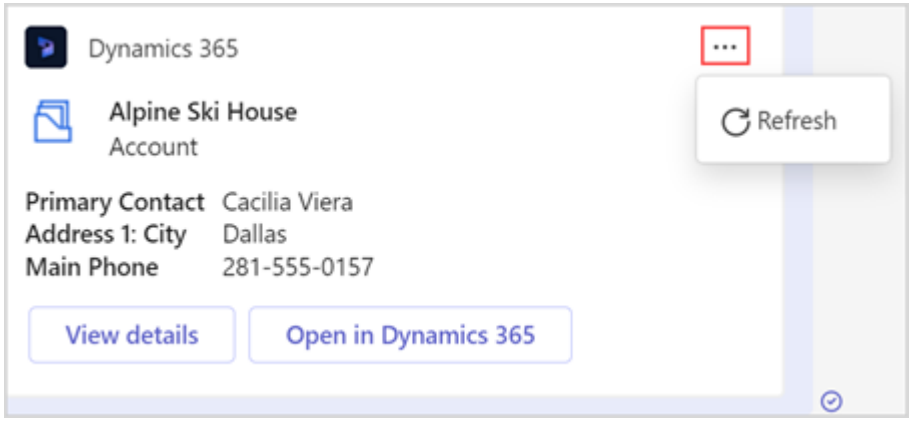
- **Open in Dynamics 365**: The record is opened in the customer engagement app.

> **Note**
>
> The recipients can view and update the record if they have the necessary permissions in Dynamics 365. Otherwise, they'll see a permission error.



2. Update the details as required and save the changes.

3. To see the updated changes in the card, hover over the card, select **More options** (...), and then select **Refresh**.



See also

Share and update Dynamics 365 records within Microsoft Teams conversations
Access the Dynamics 365 app through messaging extensions
Edit settings of the Dynamics 365 app
Share feedback
Share Dynamics 365 records within Microsoft Teams conversations
Add chat messages to Dynamics 365 as notes or tasks

Add chat messages to Dynamics 365 as notes or tasks (production-ready preview)

Article • 08/10/2022

> **Important**
>
> This topic is pre-release documentation and is subject to change.

While you're in a conversation about a particular record, you might discuss certain action items, or important points that you want to capture in Dynamics 365. The app makes it easy for you to add such messages as notes or tasks to the corresponding record.

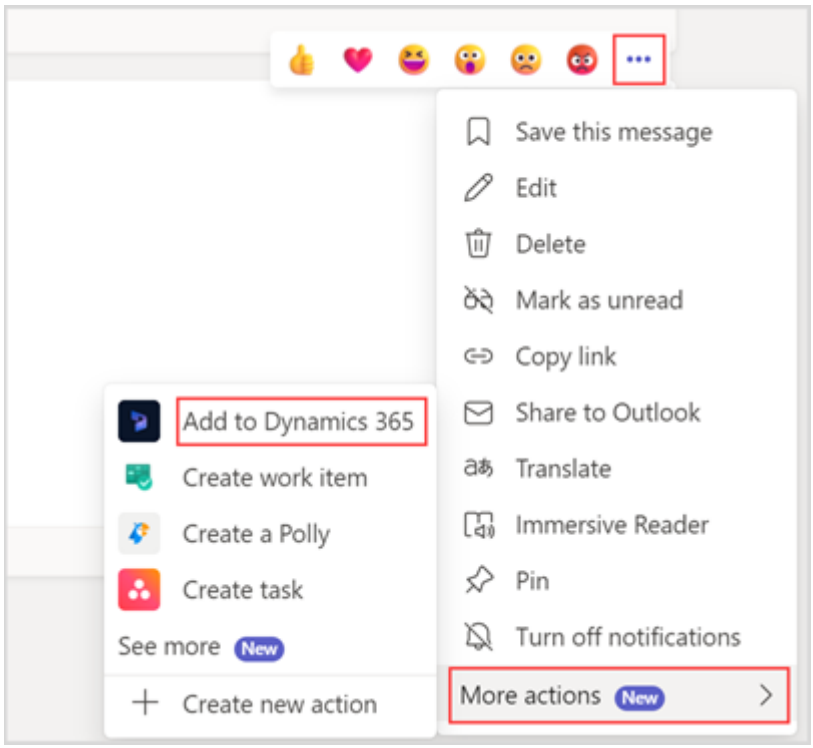
License and role requirements

Requirement type	You must have
License	• Dynamics 365 Sales Premium, Dynamics 365 Sales Enterprise, Dynamics 365 Sales Professional, Dynamics 365 Team Members, or any Dynamics 365 customer engagement app license • Microsoft Teams license More information: • Dynamics 365 Sales pricing • Microsoft Teams pricing • Dynamics 365 Team Members • Dynamics 365 Licensing Guide
Security roles	• Any primary sales role, such as salesperson, or sales manager • Any role that has access to a Dynamics 365 record More information: Primary sales roles

Add a chat message to a Dynamics 365 record

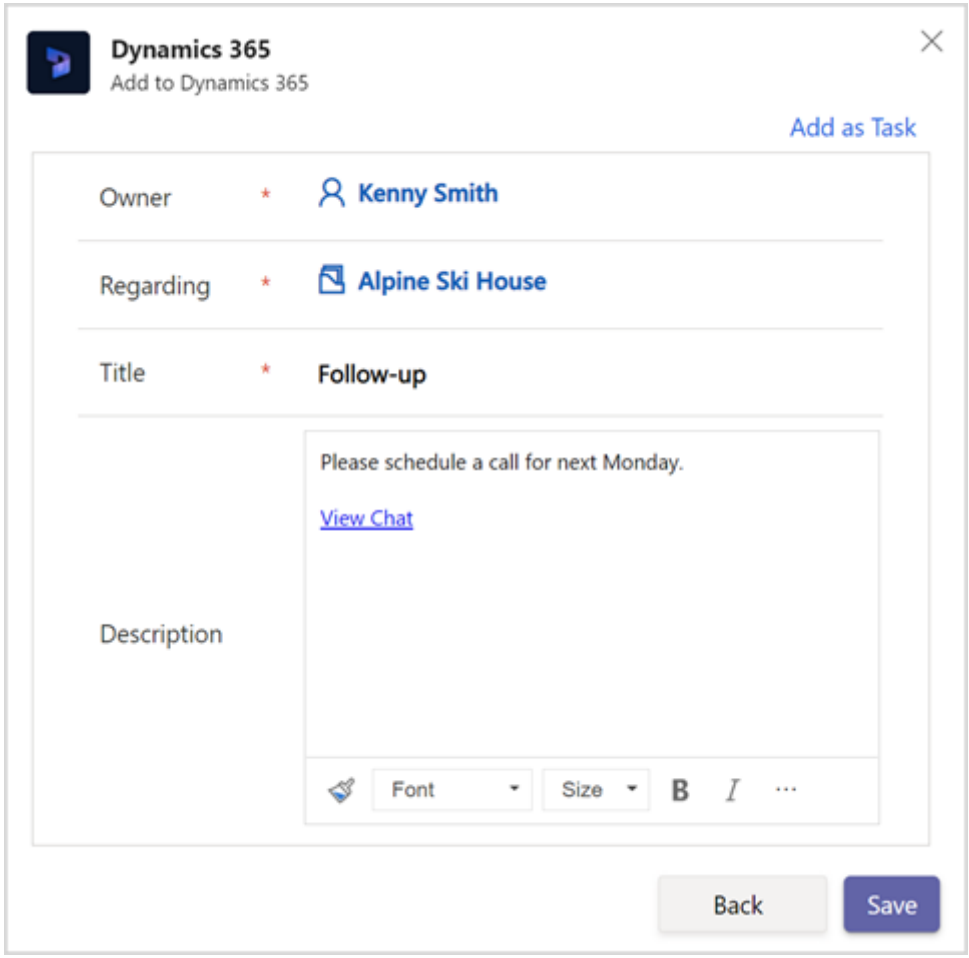
1. Hover over the message that you want to add as a note or task, and then select **More options** (...).

2. In the context menu, select **More actions** > **Add to Dynamics 365**.



3. In the **Regarding** field, select the record to which you want to add the message as a note or task.

4. In the **Title** field, enter a title for the note or task.



By default, the message is added as a note. If you want to add the message as a task, select **Add as Task** in the upper-right corner of the window. The values from the **Regarding** and **Title** fields are populated in the task accordingly.

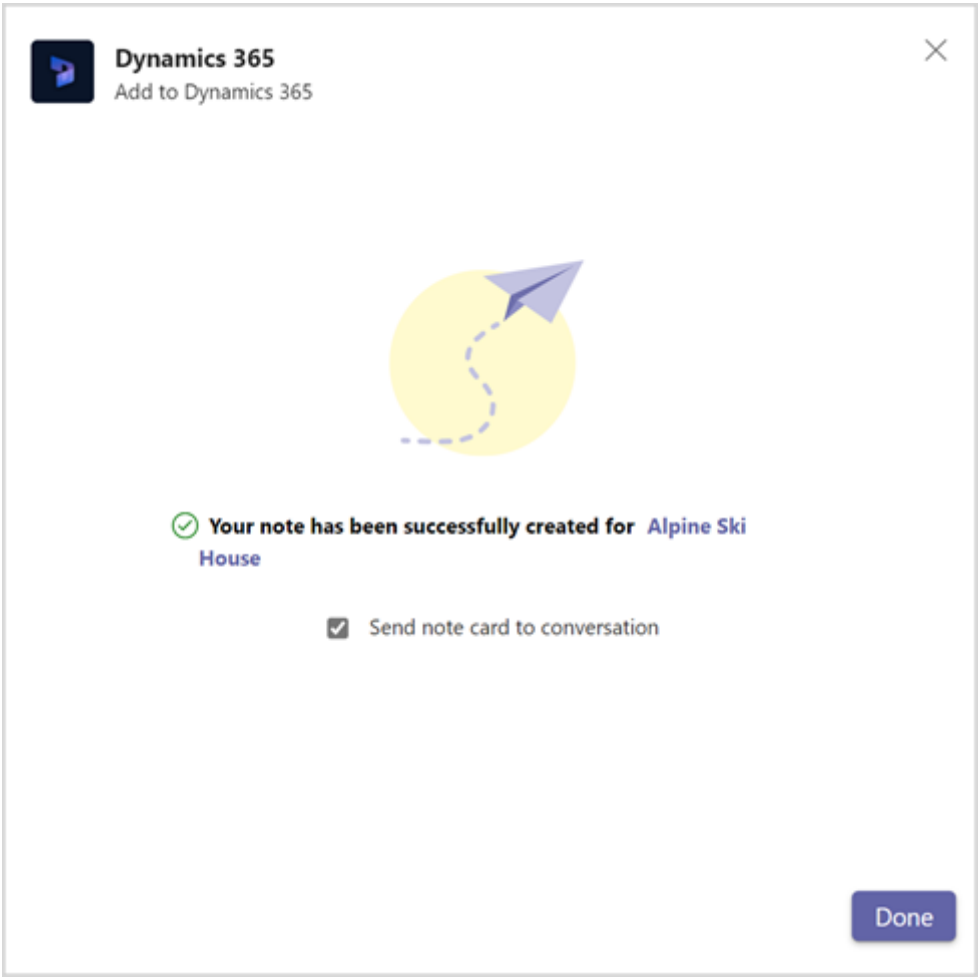
> **Note**
>
> The message is added to the description field of the note or task. Rich text format is not supported for tasks. So, if you try to add rich text messages, you'll only see the chat URL in the description for tasks. You can manually copy and paste the chat message in such cases.

5. Select **Save**.

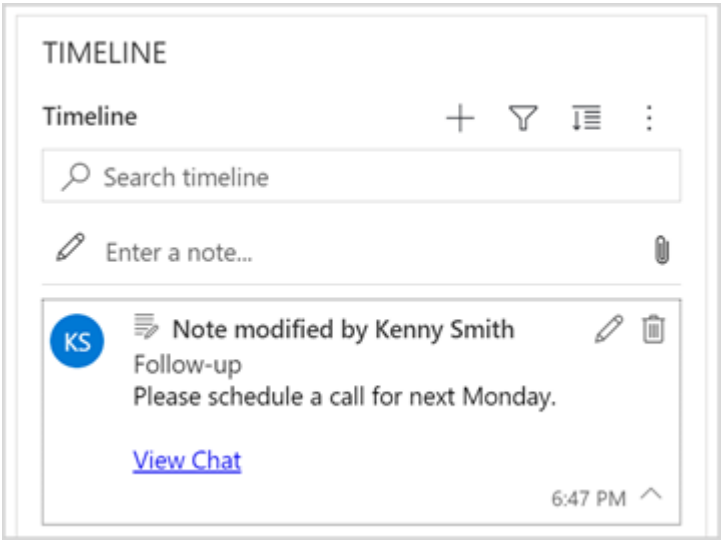
   The note or task is added to the timeline of the record.

   By default, the note or task card is sent to the conversation. If you don't want to send the note or task card to the conversation, clear **Send note card to conversation** or **Send task card to conversation**.

6. Select **Done**.



The note or task is added to the record's timeline. A **View Chat** link is added to the note or task. Selecting the **View Chat** link opens the conversation in Teams.



See also

Share and update Dynamics 365 records within Microsoft Teams conversations
Access the Dynamics 365 app through messaging extensions
Edit settings of the Dynamics 365 app
Share feedback

Share Dynamics 365 records within Microsoft Teams conversations

View and update record details

Introduction to the voice channel

Article • 10/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

Enable your customer service representatives to communicate with customers on the phone to resolve issues using the voice channel in Dynamics 365 Customer Service. While many customers increasingly use chat, SMS messages, and social media to engage and request support from organizations, phone calls continue to be an important communication channel. The voice channel provides agents with the ability to receive and make public switched telephone network (PSTN) calls through a native calling experience in Dynamics 365. Real-time AI-powered features such as live call transcription, sentiment analysis, and AI-based suggestions are available to boost agent productivity. Omnichannel for Customer Service also provides a rich set of analytics and insights, including AI-driven topic clustering and call insights.

Why choose the voice channel

Most organizations manually integrate standalone telephony and customer relationship management (CRM) solutions, which result in fragmented experiences for agents and customers across engagement channels. Such solutions from multiple providers are complex to roll out and maintain, and create data silos with disconnected insights of customer interactions and agent performance across channels.

Native platform

The voice channel is built, owned, and operated completely by Microsoft. It's an all-in-one customer service solution that reduces time to value by enabling quick and easy deployment of the voice channel for your business. Also, the voice channel is built on

Microsoft Azure Communication Services with the scalability and reliability of the calling platform.

Built alongside existing omnichannel capabilities with a common data framework

The voice channel in Dynamics 365 Customer Service is another channel to engage customers with Chat, SMS, and social media, ensuring consistent, personalized, and connected support across all channels of engagement. As an example, agents can escalate web chat conversations to voice and video calls. As another example, routing a voice call to an agent is completed with unified routing, the same way an incoming chat message is assigned to an agent. By using the same platform, the voice channel works well with other features like a Power Virtual Agents bot. The process to create and deploy a conversational interactive voice response (IVR) bot is the same as the process to create and deploy a chat bot.

Beyond workflows and processes, the voice channel benefits from a common data framework with the other channels, allowing organizations to better understand each customer's journey whether the customer sent a chat, made a phone call, or used social channels. This means the solution provides a single view of the customer that empowers agents to provide personalized service across all channels, and true omnichannel analytics and insights for agents and supervisors alike.

Differentiating AI

The voice channel has Microsoft's award-winning AI built into the product. This enables agents to resolve issues faster with tools like call transcriptions and sentiment analysis, and gain instant insights into trends.

Support for emergency calling

The voice channel supports emergency calling where agents can dial in the emergency number in a crisis. Any omnichannel voice agent with a capacity profile associated with a voice outbound profile can make an emergency call. The emergency responders can call the agent back over a temporary callback number if the call is dropped (even if the agent had called via a shared outbound number).

Key capabilities of the voice channel

Take a look at some of the key capabilities that makes the voice channel great for IT administrators, supervisors, agents, and customers.

User experience	Capability
Agent	• Call controls: Mute, Hold, End • Music on hold • Music on wait • Integrated customer and case history lookup • Notes and knowledge search • Mark a number as spam • Dial the emergency number during crisis (currently supported in the United States and Puerto Rico only) • Receive calls from emergency responders over a dedicated callback number
Calling and routing	• Ability to handle and distribute incoming calls, automatic call distribution (routing) • Voicemail • Ability to make outbound calls • Transfer to external phone number • Phone number provisioning and management • Skills-based assignment
AI	• Call insights • Real-time sentiment analysis • Real-time transcription and recording • Real-time translation of call transcripts • Real-time smart assist suggestions • No-code virtual agent as IVR
Supervisor	• Consulting and transferring • Monitoring and barging • Ability to record and manage phone calls • Operations management through supervisor dashboards
Customer	• Post-call survey • Queue position and wait time announcements • Music on hold and wait

See also

Install the voice channel

Supported cloud locations, languages, and locale codes

International availability of Omnichannel for Customer Service

System requirements

Provision Omnichannel for Customer Service

FAQ about the voice channel in Omnichannel for Customer Service

Blog: New voice channel streamlines omnichannel customer experiences

Supported cloud locations for voice channel

Article • 09/28/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article provides information about the supported cloud locations for the voice channel.

For information about international availability of live chat and digital messaging channels, see International availability of Omnichannel for Customer Service.

> **Important**
>
> - Your Microsoft 365 tenant must be colocated in one of the following geographic locations where Omnichannel for Customer Service is available.
> - The geographic locations refer to your Microsoft 365 tenant only and not the data center where your Power Platform environment or org instance resides.

Global cloud deployments

The following table lists the global region, URL, and general and trial availabilities of the voice channel. Use the global cloud deployments if the voice channel in Customer Service isn't yet available for your local cloud deployments.

Geographic location	URL	General availability	Availability in Customer Service trial
North America	crm.dynamics.com	Available	Available
Europe, Middle East, Africa	crm4.dynamics.com	Available	Available
Asia Pacific	crm5.dynamics.com	Available	Available

Local cloud deployments

If you need your data to stay within a region, the following table lists the local region, URL, and general and trial availabilities of the voice channel in local regions. Stay tuned for country or region-specific local deployment of the voice channel. More information: Datacenter regions

Geographic location	URL	General availability	Availability in Customer Service trial
Australia	crm6.dynamics.com	Available	Available
United Kingdom [1]	crm11.dynamics.com	Available	To be announced
Canada [1]	crm3.dynamics.com	Available	To be announced
Switzerland [1]	crm17.dynamics.com	Available	To be announced
India [1]	crm8.dynamics.com	Available	To be announced
Japan [1, 2]	To be announced	In preview	To be announced
South America	To be announced	To be announced	To be announced
France	To be announced	To be announced	To be announced
Germany	To be announced	To be announced	To be announced
United Arab Emirates	To be announced	To be announced	To be announced
South Africa	To be announced	To be announced	To be announced
Norway	To be announced	To be announced	To be announced
Korea	To be announced	To be announced	To be announced
Singapore	To be announced	To be announced	To be announced

Note

[1] The geographic location currently doesn't have business continuity and disaster recovery (BCDR) support. BCDR support will be a fast follow in this region.

[2] The geographic location won't have Power Virtual Agents support.

Sovereign cloud deployments

The following table lists the sovereign region, URL, and general availability of the voice channel in Customer Service.

Sovereign region	URL	General availability
Government Community Cloud (GCC) Moderate	To be announced	To be announced
GCC High	To be announced	To be announced
GCC Department of Defense (DoD)	To be announced	To be announced
China	To be announced	To be announced
Germany	To be announced	To be announced

Microsoft calling plans

Microsoft calling plans are available for customers with billing locations in select geographies around the world. To learn more about your eligibility, see Subscription eligibility and number capabilities.

You can purchase new phone numbers through the Azure portal, and then sync with Omnichannel for Customer Service. More information: Import phone numbers

You can also port existing US or toll-free phone numbers. More information: Port a phone number

Azure direct routing

You can bring your own carrier through Azure direct routing. This feature is supported across all geographic locations using certified Session Border Controller (SBC). More information: Bring your own carrier

In the geographic locations where the voice channel is generally available, Azure direct routing extends general availability support.

The voice channel in Omnichannel for Customer Service doesn't support emergency calling when Azure direct routing is used.

Next steps

Provision voice channel

See also

Overview of the voice channel
FAQ about the voice channel in Omnichannel for Customer Service

Supported languages and locale codes for voice channel

Article • 05/22/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article provides information about the supported languages and locale codes for the voice channel.

Supported languages and locale codes

Omnichannel for Customer Service uses the Azure Cognitive Services speech-to-text service for transcription. So, all languages supported by speech-to-text can be transcribed. More information: Speech-to-text documentation

> **Note**
>
> - End-to-end voice and IVR support is available only if a language is supported in Power Virtual Agents and Omnichannel for Customer Service.
> - Sentiment and AI insights are optional for the voice functionality.

See the information in the following table to know about the supported languages and locale codes.

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Afrikaans - South Africa	`af-ZA`	x	x	x	x	x	x	x
Amharic	`am-ET`	x	x	x	x	x	x	x

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Arabic - Algeria	`ar-DZ`	x	x	✓	✓	x	x	x
Arabic - Bahrain	`ar-BH`	x	x	✓	✓	x	x	x
Arabic - Egypt	`ar-EG`	x	x	✓	✓	x	x	x
Arabic - Iraq	`ar-IQ`	x	x	✓	✓	x	x	x
Arabic - Israel	`ar-IL`	x	x	✓	x	x	x	x
Arabic - Jordan	`ar-JO`	x	x	✓	✓	x	x	x
Arabic - Kuwait	`ar-KW`	x	x	✓	✓	x	x	x
Arabic - Lebanon	`ar-LB`	x	x	✓	x	x	x	x
Arabic - Libya	`ar-LY`	x	x	✓	✓	x	x	x
Arabic - Morocco	`ar-MA`	x	x	✓	✓	x	x	x
Arabic - Oman	`ar-OM`	x	x	✓	x	x	x	x
Arabic - Palestinian Authority	`ar-PS`	x	x	✓	x	x	x	x
Arabic - Qatar	`ar-QA`	x	x	✓	✓	x	x	x
Arabic - Saudi Arabia	`ar-SA`	✓	x	✓	✓	x	✓	✓
Arabic - Syria	`ar-SY`	x	x	✓	✓	x	x	x
Arabic - Tunisia	`ar-TN`	x	x	✓	✓	x	x	x

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Arabic - United Arab Emirates	`ar-AE`	x	x	✓	✓	x	x	x
Arabic - Yemen	`ar-YE`	x	x	✓	✓	x	x	x
Armenian	`hy`	x	x	x	x	x	x	x
Assamese	`as`	x	x	x	x	x	x	x
Azerbaijani	`az`	x	x	x	x	x	x	x
Bangla - Bangladesh	`bn-BD`	x	x	x	x	x	x	x
Bashkir	`ba`	x	x	x	x	x	x	x
Basque	`eu-ES`	x	x	x	x	x	x	✓
Bengali - India	`bn-IN`	x	x	x	x	x	x	x
Bosnian (Latin)	`bs`	x	x	x	x	x	x	x
Bulgarian	`bg-BGC UI`	✓	x	✓	✓	✓	x	✓
Burmese - Myanmar	`my-MM`	x	x	x	x	x	x	x
Catalan	`ca`	✓	x	✓	✓	✓	x	✓
Chinese - China - Mandarin	`zh-CN`	✓	✓	✓	✓	✓	x	✓
Chinese - Hong Kong SAR - Cantonese	`zh-HK`	✓	✓	✓	✓	✓	x	✓
Chinese - Taiwan - Traditional	`zh-TW`	✓	✓	✓	✓	✓	x	✓

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Chinese - Literary	`lzh`	x	x	x	x	x	x	x
Croatian - Croatia	`hr-HR`	✓	x	✓	✓	✓	x	✓
Czech - Czech Republic	`cs-CZ`	✓	✓	✓	✓	✓	x	✓
Danish - Denmark	`da-DK`	✓	✓	✓	✓	✓	x	✓
Dari	`prs`	x	x	x	x	x	x	x
Divehi	`dv`	x	x	x	x	x	x	x
Dutch - Belgium	`nl-BE`	✓	x	✓	✓	x	x	x
Dutch - Netherlands	`nl-NL`	✓	✓	✓	✓	✓	✓	✓
English - Australia	`en-AU`	✓	x	✓	✓	x	x	x
English - Canada	`en-CA`	x	x	✓	✓	x	x	x
English - Ghana	`en-GH`	x	x	✓	✓	x	x	x
English - Hong Kong SAR	`en-HK`	x	x	✓	✓	x	x	x
English - India	`en-IN`	x	x	✓	✓	x	x	x
English - Ireland	`en-IE`	x	x	✓	✓	x	x	x
English - Kenya	`en-KE`	x	x	✓	✓	x	x	x
English - Nigeria	`en-NG`	x	x	✓	✓	x	x	x

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
English - New Zealand	`en-NZ`	✓	x	✓	✓	x	x	x
English - Philippines	`en-PH`	x	x	✓	✓	x	x	x
English - Singapore	`en-SG`	x	x	✓	✓	x	x	x
English - South Africa	`en-SA`	x	x	✓	✓	x	x	x
English - Tanzania	`en-TZ`	x	x	✓	✓	x	x	x
English - United Kingdom	`en-GB`	✓	x	✓	✓	x	x	x
English - United States	`en-US`	✓	✓	✓	✓	✓	✓	✓
Estonian - Estonia	`et-EE`	✓	x	✓	✓	✓	x	✓
Fijian	`fj`	x	x	x	x	x	x	x
Filipino	`fil-PH`	x	x	x	✓	x	x	x
Finnish	`fi-FI`	✓	✓	✓	✓	✓	x	✓
French - Canada	`fr-CA`	✓	x	✓	✓	x	x	x
French - France	`fr-FR`	✓	✓	✓	✓	✓	✓	✓
French - Switzerland	`fr-CH`	x	x	✓	✓	x	x	x
Galician	`gl-ES`	x	x	x	x	x	x	✓
Georgian	`ka`	x	x	x	x	x	x	x

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
German - Austria	`de-AT`	x	x	✓	✓	x	x	x
German - Germany	`de-DE`	✓	✓	✓	✓	✓	✓	✓
German - Switzerland	`de-CH`	x	x	✓	✓	x	x	x
Greek - Greece	`el-GR`	✓	✓	✓	✓	✓	x	✓
Gujarati - India	`gu-IN`	x	x	✓	✓	x	x	x
Haitian Creole	`ht`	x	x	x	x	x	x	x
Hebrew - Israel	`he-IL`	✓	x	✓	✓	✓	x	✓
Hindi - India	`hi-IN`	✓	✓	✓	✓	✓	x	✓
Hmong Daw	`mww`	x	x	x	x	x	x	x
Hungarian - Hungary	`hu-HU`	✓	x	✓	✓	✓	x	✓
Icelandic - Iceland	`is-IS`	x	x	x	x	x	x	x
Indonesian - Indonesia	`id-ID`	✓	✓	✓	✓	✓	x	✓
Inuinnaqtun	`ikt`	x	x	x	x	x	x	x
Inuktitut	`iu`	x	x	x	x	x	x	x
Inuktitut - Latin	`iu-Latn`	x	x	x	x	x	x	x
Irish - Ireland	`ga-IE`	x	x	✓	✓	x	x	x
Italian - Italy	`it-IT`	✓	✓	✓	✓	✓	✓	✓

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Japanese - Japan	`ja-JP`	✓	✓	✓	✓	✓	✓	✓
Javanese - Indonesia	`jv-ID`	x	x	x	x	x	x	x
Kannada - India	`kn-IN`	x	x	✓	✓	x	x	x
Kazakh - Kazakhstan	`kk-KZ`	x	x	x	x	x	x	✓
Khmer - Cambodia	`km-KH`	x	x	x	x	x	x	x
Klingon	`tlh-`	x	x	x	x	x	x	x
Klingon (plqaD)	`tlh-Piqd`	x	x	x	x	x	x	x
Korean - Korea	`ko-KR`	✓	✓	✓	✓	✓	x	✓
Kurdish (Central)	`ku`	x	x	x	x	x	x	x
Kurdish (Northern)	`kmr`	x	x	x	x	x	x	x
Kyrgyz	`ky`	x	x	x	x	x	x	x
Lao - Laos	`lo-LA`	x	x	x	x	x	x	x
Latvian - Latvia	`lv-LV`	✓	x	✓	✓	✓	x	✓
Lithuanian - Lithuania	`lt-LT`	✓	x	✓	✓	✓	x	✓
Macedonian - Republic of North Macedonia	`mk-MK`	x	x	x	x	x	x	x
Malagasy	`mg`	x	x	x	x	x	x	x
Malay - Malaysia	`ms-MY`	✓	x	✓	✓	✓	x	✓

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Malayalam - India	`ml-IN`	x	x	x	x	x	x	x
Maltese - Malta	`mt-MT`	x	x	✓	✓	x	x	x
Maori	`mi`	x	x	x	x	x	x	x
Marathi - India	`mr-IN`	x	x	✓	✓	x	x	x
Mongolian - Cyrillic	`mn-Cyrl`	x	x	x	x	x	x	x
Mongolian - Traditional	`mn-Mong`	x	x	x	x	x	x	x
Nepali	`ne`	x	x	x	x	x	x	x
Norwegian Bokmal - Norway	`nb-NO`	✓	✓	✓	✓	✓	x	✓
Odia	`or`	x	x	x	x	x	x	x
Pashto - Afghanistan	`ps-AF`	x	x	x	x	x	x	x
Persian - Iran	`fa-IR`	x	x	x	x	x	x	x
Polish - Poland	`pl-PL`	✓	✓	✓	✓	✓	x	✓
Portuguese - Brazil	`pt-BR`	✓	✓	✓	✓	✓	x	✓
Portuguese - Portugal	`pt-PT`	✓	x	✓	✓	x	x	x
Punjabi	`pa`	x	x	x	x	x	x	x
Queretaro Otomi	`otq`	x	x	x	x	x	x	x
Romanian - Romania	`ro-RO`	✓	x	✓	✓	✓	x	✓

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Russian - Russia	`ru-RU`	✓	✓	✓	✓	✓	x	✓
Samoan	`sm`	x	x	x	x	x	x	x
Serbian (Cyrillic) - Serbia	`sr-Cyrl-CS` or sr-RS	x	x	x	x	✓	x	✓
Serbian (Latin) - Serbia	`sr-Latn-CS`	x	x	x	x	✓	x	✓
Sinhala - Sri Lanka	`si-LK`	x	x	x	x	x	x	x
Slovak - Slovakia	`sk-SK`	✓	x	✓	✓	✓	x	✓
Slovenian - Slovenia	`sl-SL`	✓	x	✓	✓	✓	x	✓
Somali - Somalia	`so-SO`	x	x	x	x	x	x	x
Spanish - Argentina	`es-AR`	x	x	✓	✓	x	x	x
Spanish - Bolivia	`es-BO`	x	x	✓	✓	x	x	x
Spanish - Chile	`es-CL`	x	x	✓	✓	x	x	x
Spanish - Colombia	`es-CO`	x	x	✓	✓	x	x	x
Spanish - Costa Rica	`es-CR`	x	x	✓	✓	x	x	x
Spanish - Cuba	`es-CU`	x	x	✓	✓	x	x	x
Spanish - Dominican Republic	`es-DO`	x	x	✓	✓	x	x	x

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Spanish - Ecuador	`es-EC`	x	x	✓	✓	x	x	x
Spanish - El Salvador	`es-SV`	x	x	✓	✓	x	x	x
Spanish Equatorial Guinea	`es-GQ`	x	x	✓	✓	x	x	x
Spanish - Guatemala	`es-GT`	x	x	✓	✓	x	x	x
Spanish - Honduras	`es-HN`	x	x	✓	✓	x	x	x
Spanish - Mexico	`es-MX`	✓	x	✓	✓	x	x	x
Spanish - Nicaragua	`es-NI`	x	x	✓	✓	x	x	x
Spanish - Panama	`es-PA`	x	x	✓	✓	x	x	x
Spanish - Paraguay	`es-PY`	x	x	✓	✓	x	x	x
Spanish - Peru	`es-PE`	x	x	✓	✓	x	x	x
Spanish - Puerto Rico	`es-PR`	x	x	✓	✓	x	x	x
Spanish - Spain	`es-ES`	✓	✓	✓	✓	✓	✓	✓
Spanish - Venezuela	`es-VE`	x	x	✓	✓	x	x	x
Spanish - Uruguay	`es-UY`	x	x	✓	✓	x	x	x
Spanish - US	`es-US`	✓	x	✓	✓	x	x	x
Sudanese - Indonesia	`su-ID`	x	x	x	x	x	x	x

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Swahili - Kenya	`sw-KE`	x	x	✓	✓	x	x	x
Swahili - Tanzania	`sw-TZ`	x	x	x	x	x	x	x
Swedish - Sweden	`sv-SE`	✓	✓	✓	✓	✓	x	✓
Tahitian	`ty`	x	x	x	x	x	x	x
Tamil - India	`ta-IN`	x	x	✓	✓	x	x	x
Tatar	`tt`	x	x	x	x	x	x	x
Telugu - India	`te-IN`	x	x	✓	✓	x	x	x
Thai - Thailand	`th-TH`	✓	✓	✓	✓	✓	x	✓
Tibetan	`bo`	x	x	x	x	x	x	x
Tigrinya	`ti`	x	x	x	x	x	x	x
Tongan	`to`	x	x	x	x	x	x	x
Turkish - Türkiye	`tr-TR`	✓	✓	✓	✓	✓	x	✓
Ukrainian - Ukraine	`uk-UA`	x	x	x	x	✓	x	✓
Upper Sorbian	`hsb`	x	x	x	x	x	x	x
Urdu - India	`ur-IN`	x	x	x	x	x	x	x
Uyghur	`ug`	x	x	x	x	x	x	x
Uzbek - Uzbekistan	`uz-UZ`	x	x	x	x	x	x	x
Vietnamese - Vietnam	`vi-VN`	✓	x	✓	✓	✓	x	✓

Language	Locale code	Voice channel	Power Virtual Agents	Speech-to-text	Text-to-speech	Sentiment	AI suggestions	UI language support
Welsh - United Kingdom	`cy-GB`	x	x	x	x	x	x	x
Yucatec Maya	`yua`	x	x	x	x	x	x	x
Zulu - South Africa	`zu-ZA`	x	x	x	x	x	x	x

Use the information in the following table to find out more about language support for voice-related features.

Feature	List of supported languages
Transcription	Language and speech support
Power Virtual Agents (IVR)	Languages supported by Power Virtual Agents
Bring your own bot (IVR)	Language and voice support for the Speech service
AI suggestions	Language support for AI suggestions
Sentiment Analysis	Multilingual sentiment
Other Omnichannel for Customer Service features	Language availability in Omnichannel for Customer Service

Next steps

Provision voice channel

See also

Overview of the voice channel
FAQ about the voice channel in Omnichannel for Customer Service

Install the voice channel

Article • 10/11/2023

To configure and use the voice channel for your business needs, you need to install the channel in Omnichannel for Customer Service.

Prerequisite

You must obtain an active subscription of **Dynamics 365 Customer Service Voice Channel Add-in** or **Dynamics 365 Customer Service Digital Messaging and Voice Add-in**. For more information about licenses and pricing, see the Dynamics 365 licensing guide. You can also purchase add-ins on the Microsoft 365 admin center.

Install the voice channel

1. Perform the steps outlined in Set up Omnichannel for Customer Service.
2. In the **Voice** section, set the **Add voice** toggle to **Yes** to enable the voice channel. Ensure that you select the **Voice and SMS Terms** checkbox.
3. Save and close.

Next steps

Connect to Azure Communication Services
Manage phone numbers

> **Note**
>
> The voice channel supports a maximum call duration of two hours, after which the call is disconnected. As a workaround, we recommend that you activate the callback feature.

See also

System requirements for using the voice channel
Set up inbound calling

Use trial phone numbers

Article • 03/17/2023

The voice channel provides up to two trial phone numbers with limited free calling time for your organization. When you run the voice trial for the first time, you're automatically assigned a toll-free trial phone number. The total free calling time for the two trial phone numbers is 60 minutes.

For information about setting up the trial and licensing requirements, see Customer Service trial FAQ and Licensing.

How trial phone numbers work

The trial phone number is a toll-free US number, so you'll be able to call this number from within US only. To be able to receive international calls, we recommend that you use a geographic US number as your second trial number. If you're calling the geographic number from outside the US, then international carrier rates will apply.

Your voice trial automatically ends after the free calling time elapses. You can also manually end the trial before the free calling time elapses. More information: End the trial

You can't reuse or purchase the trial phone number. After your free calling time has elapsed, you can either purchase new phone numbers or request Microsoft Support for more calling minutes.

> **Note**
>
> You don't need to connect to Azure Communication Services to use trial numbers.

End the trial

If you want to end the trial before it expires, select **End trial** on the **Phone numbers** page. Then, you'll be able to connect to Azure Communication Services using new or existing resources. More information: Connect to Azure Communication Services

> **Important**

You can't recover trial phone number and any related data after the trial organization has expired and been deprovisioned.

Next steps

Manage phone numbers

See also

Import phone numbers

Connect to Azure Communication Services

Article • 09/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The voice channel in Omnichannel for Customer Service is built over Azure Communication Services. This capability lets you provision phone numbers for your business by connecting to Azure Communication Services. However, to acquire phone numbers, you must first establish connection with Azure Communication Services. You can do this in the following ways:

- Quickstart: Connect using a new Azure resource
- Advanced: Connect using an existing Azure resource

You can also import phone numbers or connect your existing telephony infrastructure with Azure.

> **Note**
>
> - After you've connected to a resource in a Power Platform environment, the phone numbers purchased via the resource that are linked to the Power Platform environment can't be transferred or migrated to another environment.
> - While the system allows multiple instances of Omnichannel for Customer Service to connect with one Azure Communication Services resource, we recommend that you must map one Omnichannel for Customer Service instance only with one Azure Communication Services resource for optimal performance and to avoid issues.
> - We recommend that you **test your network** before connecting to Azure Communication Services.

See also

Overview of the voice channel
Connect using a new Azure resource
Connect using an existing Azure resource
Import phone numbers
Disconnect from Azure Communication Services
Manage phone numbers
Set up outbound calling
Bring your own carrier
Integrate a third-party IVR system with voice channel

Quickstart: Connect using a new Azure resource

Article • 08/18/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

In the voice channel, you can quickly connect to Azure Communication Services, provision phone numbers, and set up outbound and inbound calling for your business by creating and deploying a new Azure resource. More information: Azure Communication Services

Prerequisites

Before you connect an Azure resource to Azure Communication Services, you must perform the following steps.

- Check whether the **Get started** button to connect to an existing Azure resource is visible on the **Phone numbers** page. The **Get Started** button appears only in the following scenarios.
  - The trial has ended after the free calling time has elapsed.
  - You've manually ended the trial.
  - You've disconnected from the Azure resource. More information: Disconnect from Azure Communication Services resource
- Have an Azure subscription that's in the same tenant as your Dynamics 365 account. Ensure that your Azure subscription meets the Subscription eligibility and number capabilities requirements.
- Have at least contributor-level permissions to the Azure subscription. To check your role, open your subscription and view the **My role** column of your subscription on the Azure portal. You'll be able to deploy your Azure Communication Services resource only if you have contributor-level permissions.

Connect using a new Azure resource

1. In Dynamics 365, go to one of the admin apps, and perform the following steps.

Customer Service admin center

a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

b. Select **Manage** for **Phone numbers**.

2. Select **Get started**. The **Connect to Azure Communication Services** dialog opens.

3. Select **Create new resource** and enter the following details.

   - **Azure subscription**: Select a subscription from the dropdown list.
   - **Azure resource group**: Select an existing resource group or select **Create new**, and enter a name for a new resource group.

     > ⓘ **Note**
     >
     > The resource group name should be unique within a subscription.

   - **Resource name**: Enter a name for the resource. The resource name can contain only letters, numbers, and hyphens.

4. Select **Deploy** to create and deploy the resource.

Your new Azure resource is connected to Azure Communication Services. You can now acquire new phone numbers for your organization via the new resource and also enable call recording and SMS services.

See also

Overview of the voice channel
Manage phone numbers
Connect to Azure Communication Services
Connect using an existing Azure resource
Disconnect from Azure Communication Services
Set up outbound calling
Set up inbound calling
Bring your own carrier
Integrate third-party IVR systems with voice channel
Import phone numbers

Advanced: Connect using an existing Azure resource

Article • 10/18/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

You can connect your voice or SMS channels to Azure Communication Services using an existing Azure resource from any of your Azure subscriptions, *available under any tenant*. If you disconnected a resource and want to use it now, you can do so using this option.

Prerequisites

- The organization that you're using isn't a trial version.
- The **Get started** button that connects to an existing Azure resource is visible on the **Phone numbers** page of Customer Service admin center. The **Get Started** button appears only when:
  - The trial has ended after the free calling time has elapsed.
  - You've manually ended the trial.
  - You've disconnected from the Azure resource.
- Your active Azure subscription is in the same tenant as your Dynamics 365 account.
- Your role has **Contributor** privileges.

Get Azure resource information

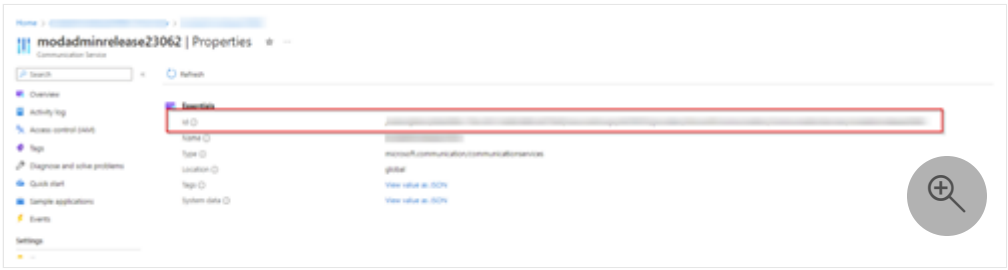
Before you connect an existing Azure resource to Azure Communication Services, you must retrieve the following information from the Azure portal:

1. Go to **Resource groups** and select the required resource group.

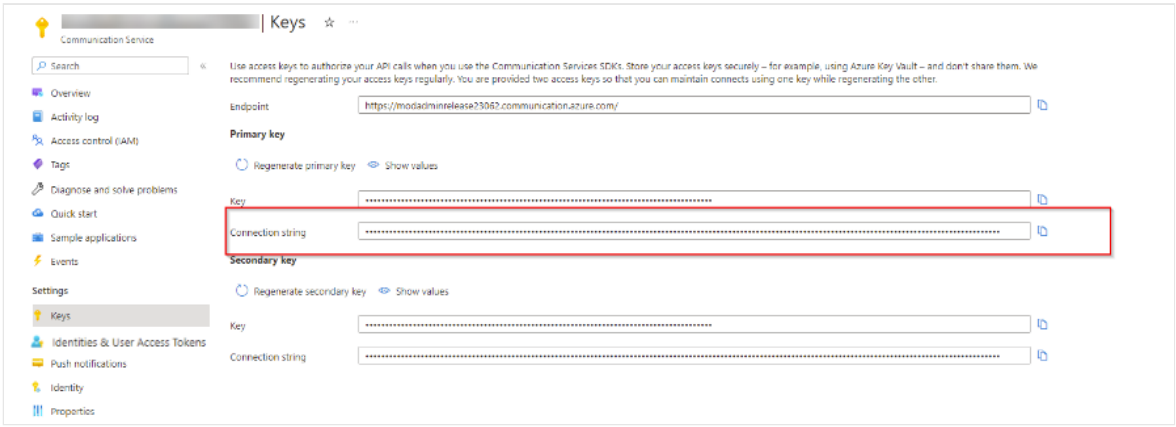
2. Select the required **Resource** from the resource group.

3. Select **Properties** in **Settings**.

4. On the **Properties** page, copy the **Name** and **Resource ID** field values, which you must specify as **ACS Resource Name** and **ACS Resource ID** values in Customer Service admin center.



5. Select **Tools** in **Keys**. On the **Keys**, copy **Connection string** in **Primary key**, which you'll use as the value of **Connection string** in Customer Service admin center.



Get application and tenant IDs from the Azure portal

You'll need to specify the values of **Application (client) ID** and **Directory (tenant) ID** in **Event grid app id** and **Event grid app tenant id** in Customer Service admin center. Perform the following steps to get these values:

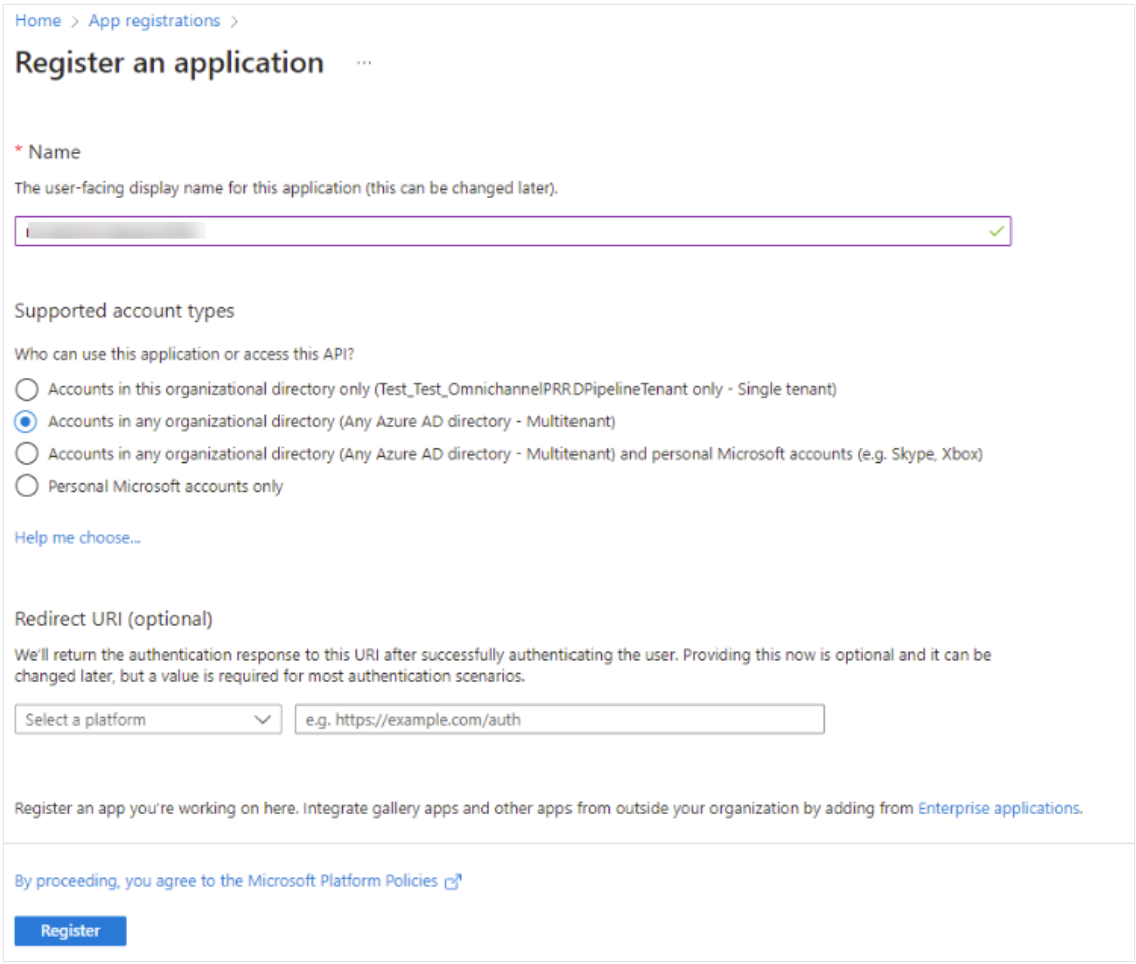
1. Open the **App registrations** page on the Azure portal.

   If you're registering your app on the Azure portal for the first time, then perform the following steps:

   a. On the **Register an application** page, enter the following details:

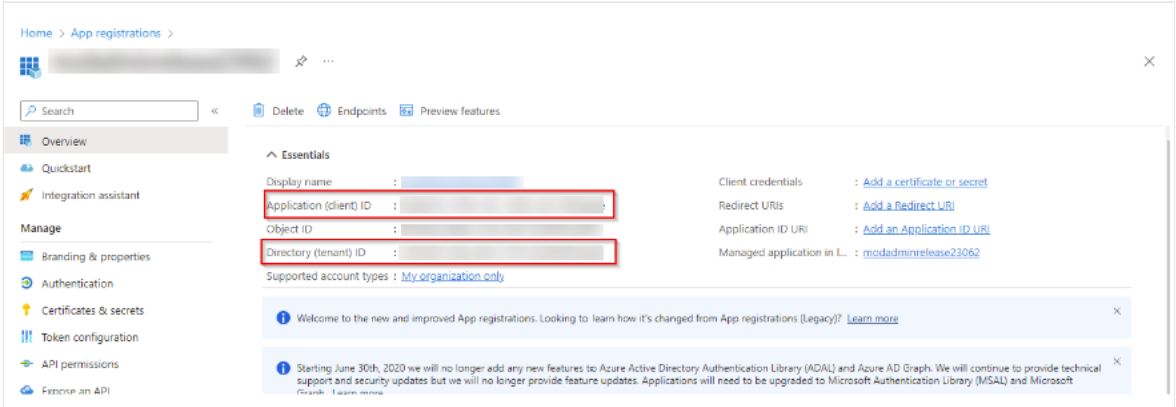
- **Name**: Enter a name for your application.
- **Supported account types**: Select **Accounts in any organizational directory (Any Azure AD directory - Multitenant)**.

b. Select **Register**.



2. Select the value of the **Application (client) ID** field, and then select the **Copy to clipboard** button. You'll need to enter this as the value of **Event grid app id** in Customer Service admin center.

3. Select the value of the **Directory (tenant) ID** field, select the **Copy to clipboard** button, and then note the value. You'll need to enter this as the value of **Event grid app tenant id** in Customer Service admin center.



Connect using an existing Azure resource

1. In Dynamics 365 Customer Service admin center or Omnichannel admin center, open the phone number settings.

    - Customer Service admin center:
      a. In the site map, under **Customer support**, select **Channels**.
      b. Select **Manage** for **Phone numbers**.

    - Omnichannel admin center: In the site map, under **General settings**, select **Phone numbers**, and then select **Get started**.

2. Select **Use existing resource**.

3. Fill in the fields using the resource information you retrieved from the Azure portal.

4. Select **Connect** to connect the resource to Azure Communication Services.

5. Select **Add number**.

6. Add a new phone number.

Next, configure voice workstream settings for the phone number, set up inbound and outbound calling, and enable call recording and SMS services.

Enable call recording and SMS services

Azure Communication Services integrates with Azure Event Grid to send real-time notifications for chat, telephony, SMS, video, and voice calling events. The Azure Event Grid, in turn, uses event subscriptions to route event messages to subscribers.

To enable call recording and SMS services, you must first configure your applications to listen to Azure Communication Services events by registering Event Grid system topics. Then, subscribe to the specific call recording or SMS events by creating Event Grid subscriptions on the Azure portal.

> **ⓘ Important**
>
> - You can only set one web hook endpoint at a time using the following procedure. To enable both SMS and call recording services, you must perform the procedure two times to set a web hook endpoint for each service.
> - When you connect your event subscription, you must use the same application (client) ID and tenant (directory) ID for the app registration as you

did when you first connected to your Azure resource. To get the event grid app and tenant IDs from the Power Apps portal, see **Get event grid app and tenant IDs from the Power Apps portal**.

1. Open the **Event Grid System Topics** service on the Azure portal.
2. Create and deploy an Event Grid system topic.
3. On the **Event Grid System Topic** page, select the **Subscription** link.
4. In the resource subscription page, select **Settings** > **Resource providers**, and then check whether the **Microsoft.EventGrid** provider is listed as **Registered**. If the Event Grid isn't registered, then select the record, and then select **Re-register** to register it.
5. Open the resource on the Azure portal. Select **Events**, and then select **Event Subscription**.
6. Enter the following details in the **Basic** tab:
    - **Name**: Enter a name for the recording event subscription.
    - **Event Schema**: Select **Event Grid Schema** in the list.
    - **Topic Types**: Select **Azure Communication Services** in the list.
    - **Subscription**: Select your subscription in the list.
    - **Resource Group**: Select the resource group.
    - **Resource**: Select the resource.
    - **System Topic Name**: This field is automatically populated with the system topic name you created. However, if you see multiple values, select the specific system topic name from the list.
    - **Filter to Event Types**: You can filter events for either call recording or SMS services.
        - To filter event types for recording services, select **Recording File Status Updated** in the list.
        - To filter event types for SMS services, select **SMS Received** and **SMS Delivery Report Received** in the list.
    - **Endpoint Type**: Select **Web Hook** in the list.
    - **Endpoint**: Select **Select an endpoint**, and then enter the recording or SMS web hook endpoint:
        - To enable recording services, get the **Recording Web Hook Endpoint** from Customer Service admin center, paste the value in **Subscriber Endpoint**, and then select **Confirm Selection**.

    - To enable SMS services, get the **SMS Web Hook Endpoint** from Customer Service admin center, paste the value in **Subscriber Endpoint**, and then select **Confirm Selection**.

7. Select the **Additional Features** tab. Select the **Use AAD authentication** checkbox, and enter the following details:

    - **AAD Tenant ID**: Enter the tenant (directory) ID of your Azure resource.
    - **AAD Application ID or URI**: Enter the application (client) ID of your Azure resource.

8. Select **Create** to create the event subscription endpoint for recording.

    It can take up to 15 minutes to sync. If you get an error like "Webhook validation handshake failed," then retry this step after a few minutes.

Learn more about configuring call recording and transcription for a voice workstream in Omnichannel for Customer Service.

Get event grid app and tenant IDs from the Power Apps portal

1. Open the Power Apps portal and select your environment.
2. In the site map, select **Dataverse** > **Tables** > **All**.
3. Search for the **Communication Provider Setting Entry** table and open it.
4. In the **Communication Provider Setting Entry columns and data** section, view the **EventGridAppID** and **EventGripAppTenantID** fields in the **Key** column, and note down the corresponding ID values from the **Values** column.

Get the subscriber endpoint for recording

1. In Dynamics 365 Customer Service admin center or Omnichannel admin center, open the phone number settings.

    - Customer Service admin center:
        a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.
        b. In **Accounts**, select **Manage** for **Phone numbers**.

    - Omnichannel admin center: In the site map, under **General settings**, select **Phone numbers**, and then select **Get started**.

2. Select a phone number, and then select **Advanced**.

3. Select **Copy** next to **Recording Web Hook Endpoint** and note the value.

Get the subscriber endpoint for SMS

1. In Dynamics 365 Customer Service admin center or Omnichannel admin center, open the phone number settings.

   - Customer Service admin center:
     a. In the site map, under **Customer support**, select **Channels**.
     b. To the right of **Phone numbers**, select **Manage**.

   - Omnichannel admin center: In the site map, under **General settings**, select **Phone numbers**, and then select **Get started**.

2. Select a phone number, and then select **Advanced**.

3. Select **Copy** next to **SMS Web Hook Endpoint** and note the value.

Next steps

Manage phone numbers
Bring your own carrier

See also

Overview of the voice channel
Connect to Azure Communication Services
Connect using a new Azure resource
Set up outbound calling
Set up inbound calling
Integrate third-party IVR systems with voice channel

Sync from Azure Communication Services

Article • 06/09/2022

You can import phone numbers that you purchased or acquired earlier via Azure Communication Services resources into Omnichannel for Customer Service.

1. In Dynamics 365, go to one of the admin apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.
   b. Select **Manage** for **Phone numbers**.

2. Select **Advanced** on the menu.

3. Select **Sync** for **Sync from Azure**. A dialog requesting you to confirm the sync action is displayed.

4. Select **Sync**.

   After you perform the sync, all the phone numbers that were acquired previously are listed on the **Phone numbers** page with the numbers that have been acquired in Omnichannel for Customer Service.

See also

Manage phone numbers
Connect to Azure Communication Services
Disconnect from Azure Communication Services
Integrate a third-party IVR system with voice channel
Supported cloud locations, languages, and locale codes
Port a phone number

Disconnect from Azure Communication Services resources

Article • 07/13/2023

If you're no longer using an Azure Communication Services resource or want to connect to a different resource, you can disconnect the current resource, and later reconnect to a new or existing resource by selecting the **Get started** button.

To permanently release or remove one or more phone numbers from your organization, see Release phone numbers.

> **Important**
>
> When you disconnect a resource, all phone numbers associated with it are also released from Dynamics 365; therefore, disconnect a resource only when you no longer need it.

Disconnect from an Azure Communication Services resource

1. In Dynamics 365, go to one of the admin apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.
   b. Select **Manage** for **Phone numbers**.

2. Select **Advanced** on the menu. The **Manage Azure Communication Services** dialog opens.

3. Select **Disconnect** for **Disconnect from Azure**. A dialog that asks you to confirm the disconnection is displayed.

4. Select **Disconnect** again. Any phone numbers associated with the resource are no longer displayed on the **Phone numbers** page.

5. Delete and clean up the event grid subscription to avoid errors.

See also

Manage phone numbers
Connect to Azure Communication Services
Import phone numbers
Integrate a third-party IVR system with voice channel
Supported cloud locations, languages, and locale codes

Manage phone numbers

Article • 07/06/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Omnichannel for Customer Service lets you enable and use voice and SMS services seamlessly within Dynamics 365. The voice channel comes with trial phone numbers with limited free calling time. More information: Use trial phone numbers

As an administrator, you can purchase phone numbers and calling plans, decide whether you want to avail calling and SMS services, and whether you'd like to set up inbound and outbound calling options for your business. You can also bring your own phone number via Azure direct routing. More information: Bring your own carrier

Prerequisites

- Check for the following criteria:
  - Azure subscriptions eligibility
  - Service limits for Azure Communication Services
  - Country or region availability
- Deploy the voice channel in Omnichannel for Customer Service.
- Connect to Azure Communication Services using an existing or new Azure resource, and then deploy the resource through Dynamics 365.
- Verify that you have permissions on the secure columns. More information: Configure permissions to access secure columns

> **Important**
>
> You can purchase one phone number per tenant for Azure Communication Services via the Azure Portal. However, if you'd like to acquire numbers in bulk or request a specific phone number, follow the instructions to create a special number request order **here**.

View phone numbers

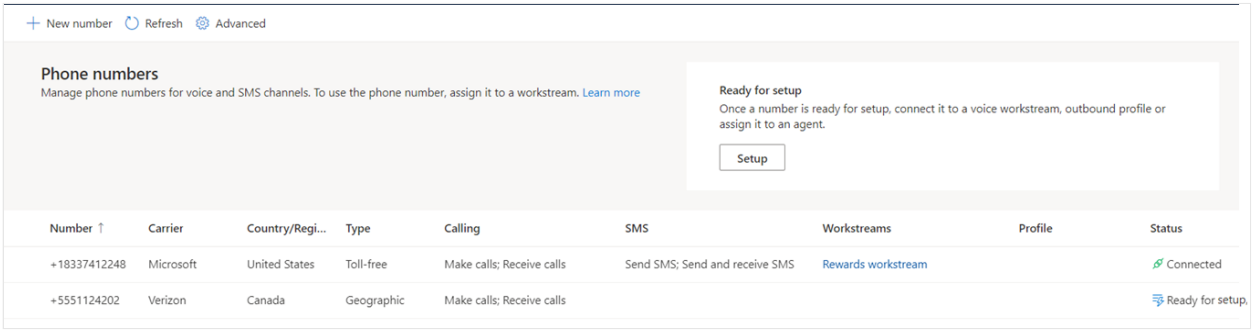
1. To view the available phone numbers in your organization, go to one of the apps in Dynamics 365, and do the following:

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

   b. Select **Manage** for **Phone numbers**.

You'll see a list of all available phone numbers together with their carrier name, calling plan details, associated workstream, connection status, and other details.



If you don't have any phone numbers set up for your business, see **Acquire new phone numbers** to learn how you can purchase new numbers.

> ⓘ **Note**
>
> If your direct routing phone number is in the inactive state, delete the number and add it again.

Acquire new phone numbers

You can purchase new phone numbers for your organization after you've checked for the prerequisites, installed the voice channel, and have successfully connected to an Azure Communication Services resource.

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

b. Select **Manage** for **Phone numbers**.

2. On the **Phone numbers** page, select **New number**. The **Add phone number** dialog opens.

3. On the **Features** page, do the following:

   a. Select **Country/Region** from the dropdown list. The list of available plans for the selected country or region appears.

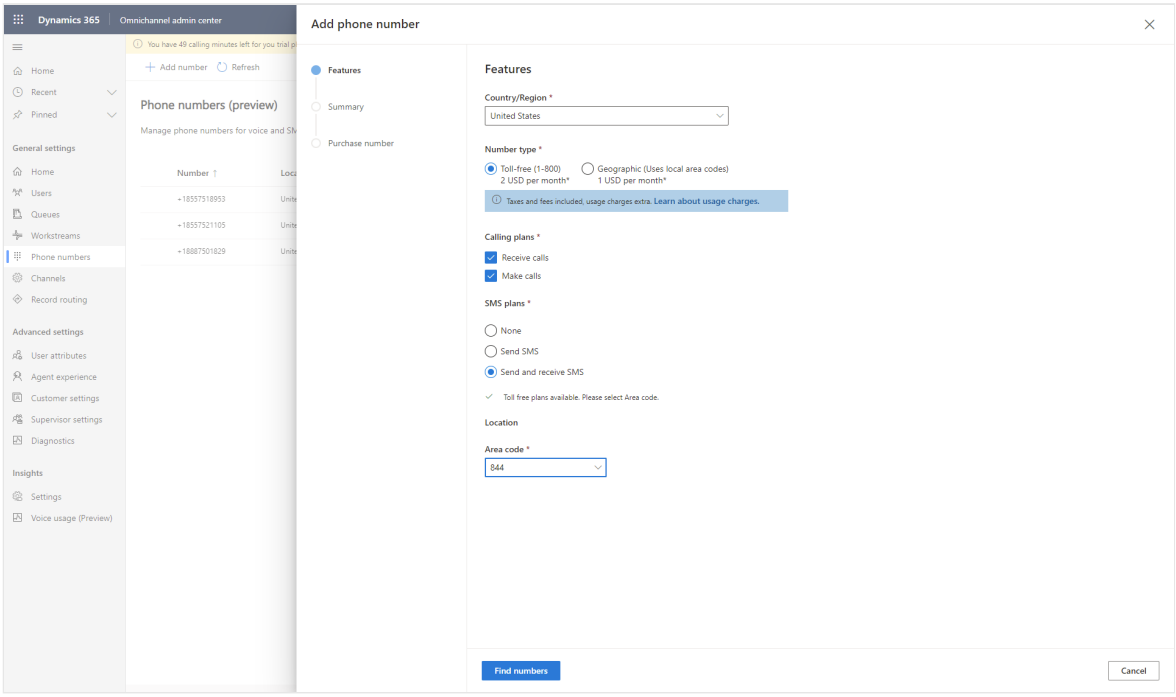
   b. Select the **Number type**, whether **Toll-free** or **Geographic**. More information: Number types and features

   c. Select the **Calling plans**—**Receive calls**, **Make calls**, or both.

   d. Select any one of the **SMS plans**—**None**, **Send SMS**, or **Send and receive SMS**. SMS facility is currently available only on toll-free numbers.

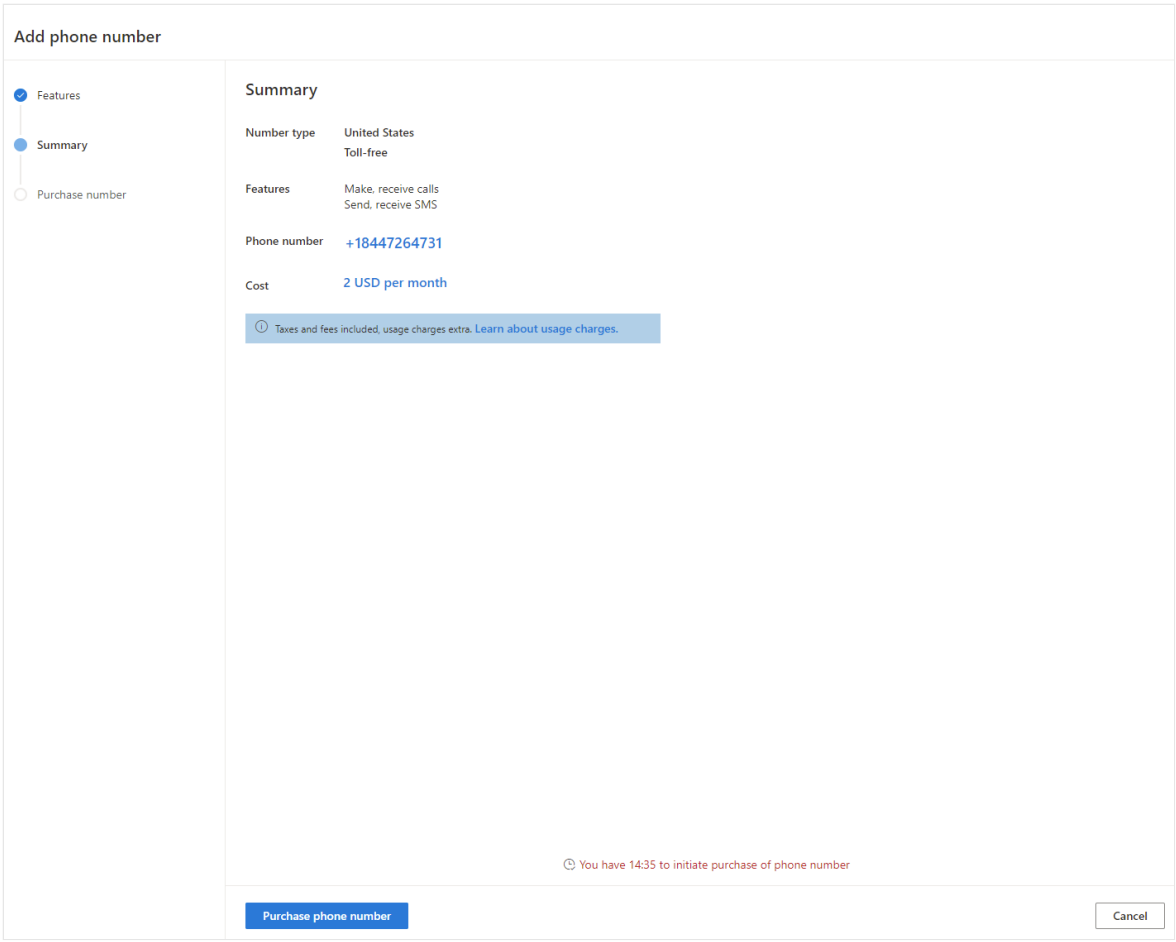
   e. In **Location**, select the area or state code from the dropdown lists.

   f. Then, select **Find numbers** to search for available numbers in your area.



   A **Summary** with the newly allotted phone number and its details is displayed.

4. On the **Summary** page, select **Purchase phone number**. Your new phone number will be displayed after purchase and you can select **Done** to get back to the **Phone numbers** page.



The new phone number is displayed in the numbers list with the status **Ready for setup**.

> **Note**
>
> - After you're allotted a new phone number, you must purchase it within the next 15 minutes. If the time elapses, you'll have to try purchasing again.
> - After you select **Purchase phone number**, you can select **Close** and return to the **Phone numbers** page. The purchase happens in the background and the new phone number appears in the phone numbers list with the **Ready for setup** status.

5. (Optional) Select **Setup Workstream** to add the phone number to a voice workstream.

6. Select **Done** to go back to the **Phone numbers** page where you can view details of the phone number that you just acquired.

> **Note**

- To port your phone number into an Azure Communication Services resource, see **Port a phone number**.
- You can port your Teams number in regions where Azure Communication Services is available. Use the information in **Create a Special Order for Telephone Numbers**.

Add a phone number to a voice workstream

After you've acquired a phone number, you must add it to a voice workstream to be able to use it. You can associate a phone number with only one voice workstream.

1. In Customer Service admin center or Omnichannel admin center, go to the **Phone numbers** page, and then select the phone number that's marked **Ready for setup** in the **Status** column.
2. Select **Setup workstream**. The **Workstreams** page with a list of all workstreams is displayed.
3. If you want to create a new workstream, select **New workstream**, and then follow the steps to set up a voice workstream.
4. Select an existing workstream from the list.
5. Follow the steps to configure a voice channel.

   The phone number is added to the workstream, and you can view the **Connected** status for the phone number on the **Phone numbers** page.

Configure phone numbers for outbound calling

After you've purchased phone numbers and associated them with voice workstreams, you can configure them for outbound calls so your agents can actually make calls to customers. More information: Configure the phone number for outbound calling

Configure voice channel for inbound calling

You can also enable your agents to receive customer calls, create queues for the voice channel, and set up routing rules. More information: Set up workstreams and queues for the voice channel

Assign phone numbers to agents

You can also assign personal phone numbers to agents, so they're able to make and/or receive calls exclusively on that number. More information: Assign personal phone numbers to agents

Edit phone numbers

If you want to change the calling plan, or upgrade the calling or SMS plans on a particular number, you can do so by editing the phone number. For example, if you hadn't selected any SMS plans, you can upgrade to the **Send SMS** or **Send and receive SMS** plans; if you had selected only the **Send SMS** option, you can now upgrade to the **Send and receive SMS** plans.

1. In Customer Service admin center or Omnichannel admin center, go to the **Phone numbers** page. The list of the available phone numbers for your business is displayed.
2. Select a phone number and then select **Edit**. The **Edit phone number** dialog with the current plan type, calling plan, and SMS plan is displayed.
3. Make any changes to your call or SMS plans, and select **Save and Close**.

> **Important**
>
> - You can't upgrade a phone number or change your call or SMS plans, after it's connected to a workstream.
> - You can't remove features once granted to a phone number, but you can upgrade phone number features. For example, if you chose both **Make calls** and **Receive calls** options in your calling plans, you can't change it. However, if you selected **None** for SMS plans, you can upgrade to **Send SMS** or **Send and receive SMS** plan.

Release phone numbers

If you no longer need a phone number, you can release it from your organization's phone number list. However, before you plan to remove the phone number from your business, you must remove the number from any associated workstreams or outbound profiles. Also, if the number is assigned as a personal number to any agent, you must disable the number, and then try releasing it again.

> **Important**
>
> When you release a phone number, you actually delete it from Dynamics 365, so release a number only if you're sure that you don't need it at all. To disconnect phone numbers from an Azure Communication Services resource, see **Disconnect from Azure Communication Services resource**.

1. In Customer Service admin center or Omnichannel admin center, go to the **Phone numbers** page. The list of the available phone numbers for your business is displayed.
2. Select a phone number and select **Release number**. The **Release number** dialog requesting you to confirm the number deletion is displayed.
3. Select **OK** if you're sure you don't need the number. The phone number is removed from your organization and is no longer displayed in the **Phone numbers** list.

Next steps

Set up outbound calling
Set up inbound calling

See also

Overview of the voice channel
Connect to Azure Communication Services
Import phone numbers
Disconnect from Azure Communication Services
Block spam numbers
Bring your own carrier
Integrate a third-party IVR system with voice channel
Port a phone number
Use trial phone numbers

Set up inbound calling

Article • 06/07/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Configure inbound calling to set up the voice channel in Customer Service. You can enable your customer service representatives to communicate with customers on the phone to resolve issues using the voice channel.

Prerequisites

Ensure that the following prerequisites are met:

- Voice channel is provisioned. More information: Provision Omnichannel for Customer Service
- Unified routing is enabled. More information: Provision unified routing

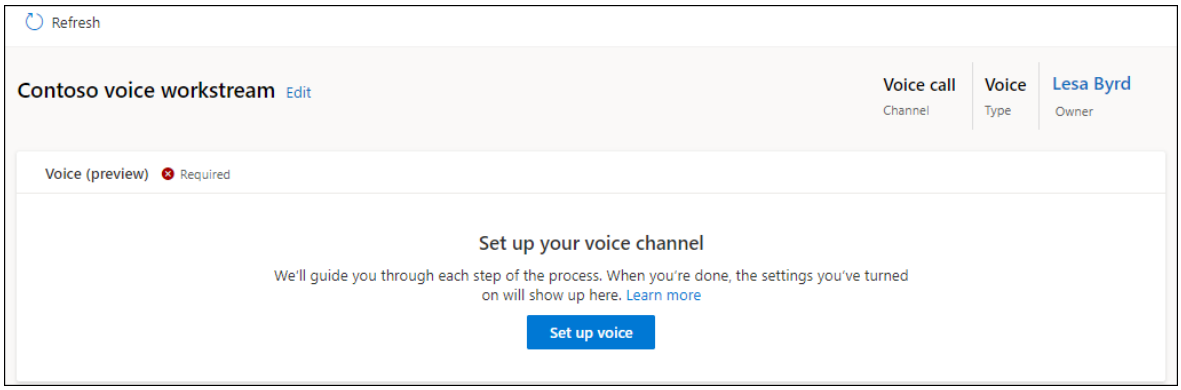
Set up a voice workstream

Do the following to configure a workstream for voice:

1. On the left pane, select **Workstreams**, and then on the **Create a workstream** dialog, enter the following.
2. Enter the following details for the workstream:
    - **Name:** An intuitive name, such as Contoso voice workstream.
    - **Type:** Select **Voice**.

    > **Note**
    >
    > By default, **Owner** and **Channel** are predefined and unavailable, and only push is available for work distribution mode.

3. Select **Create**. The workstream that you created is displayed.



Configure a voice channel

To configure the voice channel, you'll need to associate the workstream with a phone number for routing the calls. You can view the list of available phone numbers by selecting **Phone numbers** in the left pane. To get a new number, you can select **Add number** on the **Phone numbers** page. More information: Acquire a phone number

1. Go to the workstream that you created, and on the page that appears, select **Set up voice**.

2. On the **Phone number** page, select a number from the list, and select **Next**.

   > ⓘ Note
   >
   > - Only those numbers are displayed that have inbound calls enabled and are not already associated with any other workstream. Use the steps in **Acquire a phone number** if you want to configure a new number.
   > - The voice channel supports anonymous inbound calls on those numbers only that are configured via Azure Communication Services direct routing.

3. On the **Language** page, select **Add primary language** and perform the steps to configure the primary language. More information: Allow customers to choose a language

4. On the **Behaviors** tab, turn on the **Customer wait time** toggle, and select the following options:

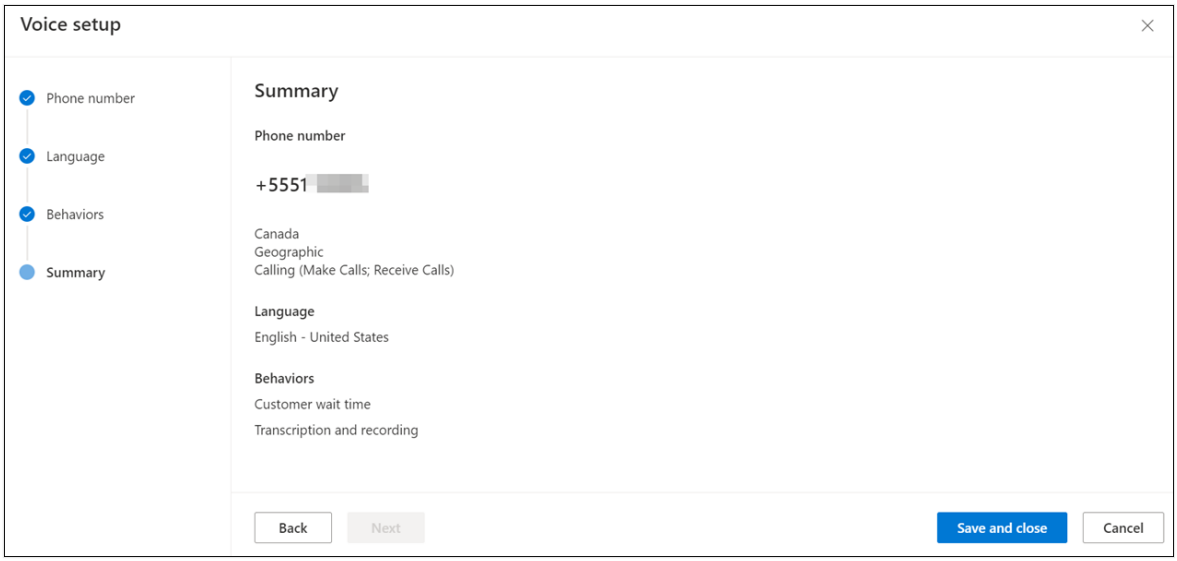
   - Notify position in queue
   - Notify average wait time

5. Turn on the **Channel operating hours** toggle, and select an operating hour record. More information: Configure operating hours for your business

6. Configure the settings for transcription and recording of the calls in the **Transcription and recording** area. More information: Configure call recordings and transcripts

7. Select **Add** for **Custom automated messages**, then select a default template message as the trigger, and then enter the custom automated message text. For information about automated messages, see Configure automated messages

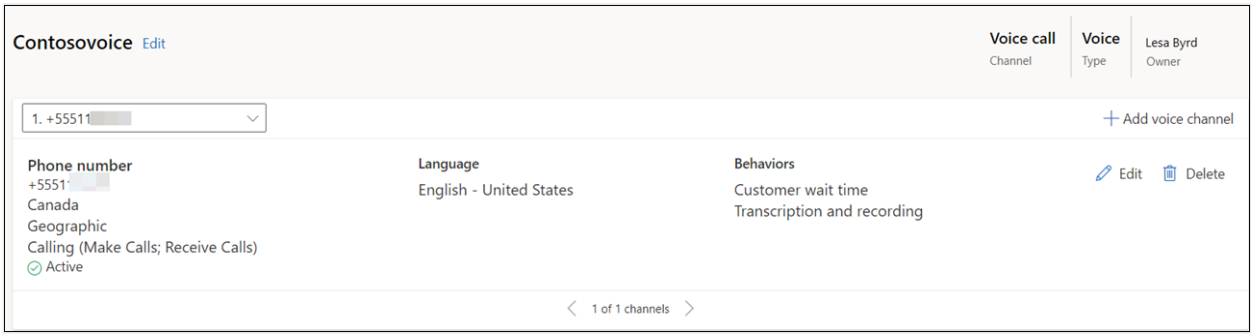
8. Turn on the **Call transfer to external phone number** toggle to allow agents to transfer the call to an external number.



9. Turn on the toggle for **Consult with Microsoft Teams user** to enable the agents to consult other agents on Microsoft Teams. More information: Voice consult with a Microsoft Teams user

10. On the **Summary** page, select **Save and close**.

The phone number is associated with the workstream.



Acquire a phone number

Do the steps mentioned in Manage phone numbers to acquire a phone number.

Create queues for voice channels

In Customer Service, work items are assigned to a queue and agent with the help of unified routing. Unified routing is an intelligent, scalable, and enterprise grade routing and assignment capability that can assign the incoming work item to the best suited queue and agent while adhering to work item requirements and matching them with the agent's capabilities using round robin routing. More information: Overview of unified routing

In this section, we'll cover information on how to create a queue for the voice channel and routing rules to evaluate conditions and assign work items.

Create a queue for the voice channel

In the left pane, select **Queues**, and then complete the following steps to create a queue for the voice channel:

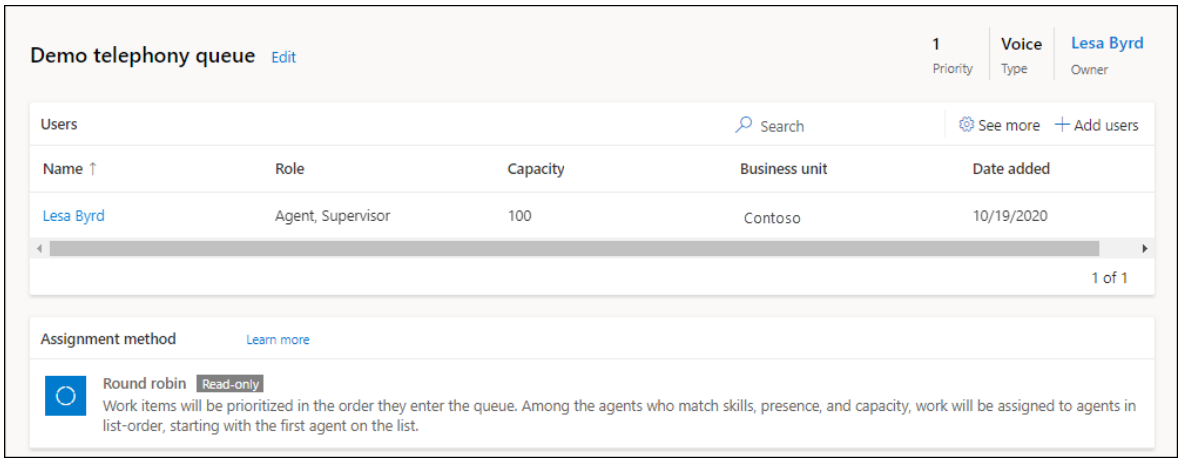
1. On the **Queues** page, select **New**, and on **Create a queue** dialog, enter the following details.

    - **Name**: Specify a name.
    - **Type**: Select **Voice**.
    - **Group number**: Enter a number.

2. Select **Create**. The queue is created.

3. On the queue page, select **Add users**, and on the **Add users** flyout menu that appears, select the users and select **Add**.

    > ⓘ **Note**
    >
    > - You can add only those users who are configured for unified routing.
    > - After 20 minutes of being added to a queue, agents must refresh their dashboards to be able to receive calls.



Configure call overflow for the voice queue

With call overflow, you can reduce the wait time for customer calls by setting options for voice queues. More information: Manage overflow

Assignment rules for a queue

By default, the assignment method for a voice queue is round robin. In the round robin method, work items will be prioritized in the order they enter the queue. Among the agents who match skills, presence, and capacity, work will be assigned to agents in the order they're listed. The agent listed on the top is assigned first. You can also choose highest capacity or create custom assignment methods. More information: Assignment methods

For a simple and quick voice call routing, you don't need to set up any rules for unified routing. By default, all the incoming voice calls will be routed to the "default voice queue" and will be assigned to the agents with the round robin assignment method.

Configure routing rules for the voice workstream

Go to the workstream for which you've configured the voice channel and do the following steps:

1. In the **Routing rules** area, in the **Route to queues** option, select **Create ruleset**.
2. On the **Create route-to-queues ruleset** dialog, provide a name and description, and then select **Create**.
3. On the page that appears, select **Create rule**.

4. On the **Create rule** page, enter a rule name, and in **Conditions**, define the set of conditions using the conversation entity and related entity attributes.
5. In **Route to queues**, select the queue that you created and to which the voice call must be routed when the conditions specified are met.
6. To configure percentage-based distribution of work items, see Percentage-based allocation of work to queues
7. Select **Create**. The rule is created and appears in the list of rules.
8. Create as many rules as your business requires.

Configure work classification rules

You can configure work classification rules for the voice workstream to add detailed information to incoming work items. This information can be used to route the calls optimally. More information: Configure work classification

See also

Overview of voice channel in Omnichannel for Customer Service
Overview of unified routing
Assignment methods
Set up outbound calling
Configure outbound and inbound profiles
Manage phone numbers
Use voicemail to handle overflow of calls

Set up outbound calling

Article • 08/10/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article describes how you, as an administrator, can set up outbound calling for phone numbers in your organization. After you set up outbound calling, your agents can make calls to customers in the Omnichannel for Customer Service or Customer Service workspace app.

If you don't have any phone numbers provisioned for your business, then see Acquire a new phone number to learn how you can acquire new phone numbers. Phone number calling plans must be provisioned to support making calls to be used for outbound voice.

Prerequisites

Before you set up outbound voice calls for your business, you must perform the following steps.

1. Configure one or more phone numbers for outbound calling.
2. Create a voice type queue or use an existing voice queue to associate with the outbound profile.
3. Configure capacity profiles and add users.
4. Create outbound profiles

Configure phone numbers for outbound calling

To check whether a phone number is enabled for outbound calling, go to **General settings** > **Phone numbers**, and check whether the number has **Make calls** mentioned in the **Calling** column. You can configure the calling plan for a phone number if it is not enabled for outbound calling.

1. In Dynamics 365, go to one of the apps, and perform the following steps.

Customer Service admin center

a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

b. Select **Manage** for **Phone numbers**.

2. In the **Edit number** dialog, in the **Calling plans** area, select the **Make calls** option, and then select **Upgrade**. Your phone number is now upgraded for outbound calling.

The phone number will now be displayed to your customers when your agents call them.

> **Note**
>
> - Though you can use the same queue for both inbound and outbound calling, we recommend that you create separate queues for inbound and outbound calling. This will help your supervisors monitor and gauge traffic and customer sentiment, specific to outbound calls.
> - To configure call transfer to an external number to manage overflow, outbound calling must be enabled.

Configure capacity profiles and assign users

You must create or use existing capacity profiles to define and set the workload of your agents. For your agents to be able to make calls to customers, they must be assigned or added to an outbound capacity profile. If an agent is not assigned to a capacity profile associated with an outbound profile, then outbound calling features won't be available to the agent. So, ensure that after you create or update the capacity profile, you add users to the profile.

For detailed information on how to manage capacity profiles and add users, see Create and manage capacity profiles.

For outbound calls, set the capacity profile fields as follows:

- **Work item limit**: Indicates the number of outbound calls an agent can make at a time. If the value is set to 1, it means that the agent can make only one call at a

time, and cannot make a second call until the first call is ended. If the value is set to 3, it means that the agent can make 3 outbound calls at a time.

- **Reset frequency**: Indicates whether the agent can immediately make another call when the current ends or has to wait until end of day. For voice calls, set this field to **Immediate** so that the agent will be able to make another call as soon as the current one has ended.
- **Assignment blocking**: Indicates whether you want to block any incoming calls when the agent is already on a call. Set this value to **Yes**, if you want to ensure the agent does not receive any incoming calls when an outbound call is in progress.

> **Note**
>
> - When you name your capacity profiles, we recommend that you clearly indicate in the capacity **Profile name** field whether they're outbound, inbound, or both, so it's easy for you to assign users or agents to the appropriate profile.
> - Though you can use the same capacity profile for both inbound and outbound calling, we recommend that you create separate profiles because the considerations and settings for outbound calling and inbound calling can differ.
> - If your agents are assigned to receive customer calls only and not assigned to any capacity profile used for outbound calling, call features will not be displayed to the agent.

Assign personal phone numbers to agents

You can assign personal phone numbers to agents to make outbound calls to customers.

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**.
   b. On the **Channels** page, select **Manage** for **Phone numbers**.

2. On the **Phone numbers** page, select **Setup** in **Ready for setup**, and in the dialog that appears, select **Assign to user**. The **Omnichannel Users** page displays a list of

all agents.

3. Select an agent to open the agent details page.
4. Select the **Omnichannel** tab and select a phone number from the **Omnichannel Phone** field. The phone number is now assigned exclusively to the agent to call customers.

> **Note**
>
> - You can assign to agents local phone numbers only as personal phone numbers; toll-free numbers can't be assigned. Personal agent phone number calls always apply the default scoped outbound profile.
> - You can add only those users who are configured for unified routing.
> - After 20 minutes of being added to a queue, agents must refresh their dashboards to be able to make calls.

See also

Overview of the voice channel
Manage phone numbers
Configure outbound and inbound profiles
Bring your own carrier
Set up inbound calling

Support emergency calls made by agents

Article • 10/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article describes how emergency calling works in Customer Service when agents dial an emergency number during crisis situations.

> **Note**
>
> - Emergency calling is currently supported in the United States, Puerto Rico, and Canada only where the emergency calling number is 911.
> - If the **Customize active conversation** form is enabled and an agent initiates an outbound call to emergency services, the active conversation form doesn't display the **Save** and **Refresh** options.

Prerequisites

Make sure that the following prerequisites are complete so that the emergency calls work properly:

- The omnichannel agent user has a capacity profile associated with a voice outbound profile. For more information, see Configure capacity profiles and Create outbound profiles.
- Browser location setting is enabled, and set to United States or Puerto Rico.
- For the email notification, the mailbox for the agents is enabled.
- For the emergency call to be handled, one of the following conditions must be fulfilled:
  - The number from which it originates must be a Microsoft calling plan number.

> **Note**
>
> If you use a third-party public switched telephone network (PSTN) carrier, discuss the emergency calling behavior with the carrier and then configure it.

- When the Azure Communication Services resource (tenant) has both direct routing (third-party PSTN carrier number) and at least one direct offer (Microsoft calling plan number) enabled and there's no direct routing rule for the emergency number, the call will follow the direct offer path and will be routed to our direct offer emergency calling service. More information: Voice routing considersations

How emergency calls work

In Customer Service workspace or Omnichannel for Customer Service, agents can use the dialer to call the emergency number during a crisis.

Here's how the emergency calls work:

1. The agent calls the emergency number such as 911 in the United States or Puerto Rico.
2. The agent status automatically changes to "Do not disturb," irrespective of the current status.
3. A temporary callback number is assigned to the agent for a duration of 60 minutes.
4. If the emergency call is dropped or gets disconnected, then the emergency responder can call back the agent via this callback number. The emergency callback gets the highest priority, bypassing all configured routing rules, capacity profiles, and presence settings.
5. During the ongoing emergency conversation, the **Communication Panel** displays the device settings and the **End call** button only. An alert appears indicating that an emergency call is in progress.
6. To ensure confidentiality, the application doesn't record or store the outgoing and incoming emergency calls as activities in call history.
7. If you configure emergency contacts, an automated email message goes out to the contacts when the agent dials the emergency number.
8. When the agent ends the emergency call, the agent presence changes back to the prior status.

Set up email recipients

When the agent makes an emergency call, the system can send an automated email to their supervisors or whoever needs to be informed about the call to ensure efficient emergency responder access. The system uses the **Emergency Call Notification Template** to send the email. You can use the **Editor** to modify the template.

1. In the Customer Service admin center, go to **User management** under **Customer support**, and for **Users**, select **Manage**.
2. On the page that appears, select the **Omnichannel Users** view, and then select the user that you want to update.
3. Select the **Omnichannel** tab, and in **Emergency Call Notifications**, add the email addresses of the recipients separated by a semicolon.
4. Save the changes.

See also

Set up outbound calling in the voice channel
Set up inbound calling in the voice channel
Customize email template using template editor

Introduction to Nuance Gatekeeper integration (preview)

Article • 08/09/2023

[This article is prerelease documentation and is subject to change.]

> **Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Nuance Gatekeeper is a biometric authentication and fraud prevention technology that can be integrated with Microsoft Dynamics 365 Customer Service. It offers a streamlined verification process that allows contact centers to identify customers through natural conversation without relying on specific questions, security codes, or secret questions and answers.

By using voice biometrics, Nuance Gatekeeper can quickly and accurately verify a customer's identity, significantly reducing the risk of fraud and protecting customers' personal data from unauthorized access. The integration with Nuance Gatekeeper in Customer Service helps agents deliver efficient, personalized service and helps fraud teams prevent, detect, and investigate more fraud.

How Nuance Gatekeeper works in Customer Service

After Nuance Gatekeeper is integrated with the voice channel in Customer Service, it analyzes how a person sounds, how they talk, while characterizing their device, network, location, and other factors for signs of fraud. The check happens seamlessly in the background of each engagement, so your customers can get the service they need without remembering pass codes, PINs, or security questions.

Nuance Gatekeeper uses deep neural networks to determine a single, transparent authentication decision for every engagement. The platform is built on the following pillars of biometric security and AI decision-making:

- **Voice**: Authenticate customers based on the distinct characteristics of their voice, regardless of age or language.
- **Channel**: Identify device, ANI, channel, location, and network to flag suspicious signals such as hidden network origins, SIM swapping, and spoofing.
- **AI risk engine**: Deep neural networks analyze interactions to determine true matches and prevent fraud.

Next steps

Add an authentication setting for Nuance Gatekeeper

Configure contact center for Nuance Gatekeeper integration (preview)

Article • 08/09/2023

[This article is prerelease documentation and is subject to change.]

> **Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Use the information in this article to configure the following settings:

- Conversation Conductor Service
- Omnichannel Event Grid Writer Service

Configure Conversation Conductor service

The Conversation Conductor handles the audio stream that's required to support biometric authentication and fraud prevention capabilities. This service requires the Contributor role on the specific Azure Communication Services resource that's connected to the Power Platform environment. This step must be performed by an Azure administrator.

1. Go to Azure portal.
2. Go to **Azure Communication Services resource** > **Properties** > **Id**. Use the SubscriptionId and ACSResourceId that's connected to the Power Platform environment.
3. Create service principals in the Azure tenant by using the following PowerShell commands:
   - `Connect-AzAccount -SubscriptionId "<SubscriptionID>”`
   - `New-AzADServicePrincipal -ApplicationId "c880d6fb-5c66-49ef-9cf5-e53e31900be5" -DisplayName "Conversation Conductor"`

4. Provide contributor access to the Conversation Conductor so it can answer calls on the Azure Communication Services resource. (Application id: c880d6fb-5c66-49ef-9cf5-e53e31900be5).

5. Go to **Communication Service** > **Select the specific ACS resource** > **Access Control** > **Add role** assignment, and then select **Conversation Conductor** app in **Contributor**.

Configure Omnichannel Event Grid Writer service

Create a new Omnichannel Service Principal account to configure new Event Grid subscriptions for incoming call events to the Conversation Conductor Service. This service requires EventGrid EventSubscription Contributor privilege on the specific Azure Communication Services resource connected to the Power Platform environment. This step must be performed by the Azure administrator.

1. Go to **Azure Communication Services resource** > **Properties** > **Id**. Use the SubscriptionId and ACSResourceId that's connected to the Power Platform environment.

2. Create the Service Principal for Omnichannel for Customer Service.

   - `Connect-AzAccount -SubscriptionId "<SubscriptionId>”`.
   - `New-AzADServicePrincipal -ApplicationId "a950df6d-e658-48fc-b494-ec69d8d9731b" -DisplayName "Omnichannel EventGrid Writer App"`.

3. Provide access to the Omnichannel Event Grid Writer with permission to configure Event Grid subscriptions on the Azure Communication Services resource.

   - `Connect-AzAccount -SubscriptionId "<SubscriptionId>”`.
   - `New-AzRoleAssignment -ApplicationId "a950df6d-e658-48fc-b494-ec69d8d9731b" -RoleDefinitionName "EventGrid EventSubscription Contributor" -Scope "<ACSResourceId>"`.

See also

Add an authentication setting for Nuance Gatekeeper
Introduction to Nuance Gatekeeper integration

Add an authentication setting for Nuance Gatekeeper (preview)

Article • 08/31/2023

> **ⓘ Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

[This article is prerelease documentation and is subject to change.]

> **ⓘ Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Use the information in this article to add an authentication setting for Nuance Gatekeeper in Customer Service.

Prerequisites

Make sure that the following prerequisites are met:

- Nuance Gatekeeper instance is provisioned.
- Omnichannel for Customer Service with the voice channel is provisioned.
- Azure Communication Services must be configured on the Customer Service tenant.
- OpenID basic configuration in the Microsoft Entra ID to allow single sign-on process for the administrator, fraud analyst credentials, and Nuance portals.
- Azure Service Principal for Conversation Conductor and Omnichannel Event Grid Writer are provisioned.
- The following information is shared by the Nuance Gatekeeper team:
  - Gatekeeper Client ID and Client Secret.
  - Gatekeeper Scope ID, such as b6f1a330-xxxx-xxxx-a03c-387ac9axxxxx.
  - Gatekeeper Config Set ID, such as ContactCenterDemo.

Check for Azure tenant requirement

The Customer Service instance and the Azure Communication Services resource that's connected to the organization must be in the same Azure tenant. We also recommend that the Azure Communication Services resources used for Customer Service instance that's using Gatekeeper be isolated in their own Azure subscription.

To verify, do the following steps:

1. In Customer Service admin center, go to the workstream and voice channel you'll use.
2. Verify that the Customer Service instance and Azure Communication Services resource with phone numbers are in the same tenant.

If your Customer Service instance isn't in the same tenant, you can't register the new service components that share the audio stream between the Digital Contact Center Platform and Nuance Gatekeeper. Instead, you'll see an error message when you try to create the authentication setting.

Create application registration for single sign-on

You'll need to do some of the Gatekeeper actions in the Nuance portals. Therefore, to simplify access and credentials, the Nuance Gatekeeper team configures single sign-on access to your Microsoft Entra ID, so that you can use your regular username and password to access the functionality.

Create a new application registration in your Microsoft Entra ID and share the OpenID Connect metadata document by following these steps:

1. Go to Azure portal.
2. Select **Azure Active Directory** in the site map.
3. On the **Azure Active Directory** page, select **App registrations** in the site map.
4. If you're an existing Nuance Gatekeeper customer, you probably have a registered app for Nuance Gatekeeper. Search in the **All applications** tab for Nuance Gatekeeper. If you don’t have it registered, do the following steps:
   a. Select **New registration**.
   b. Type the name **Nuance Gatekeeper** for your app registration, and select **Register** at the bottom of the page. After the app is registered, the **App Registration Details** page appears.
5. Select **Endpoints** to get the URL needed for single sign-on.
6. On the **Endpoints** page, copy the value in the **OpenID Connect metadata document** field.

Add the authentication setting for Gatekeeper

1. In the Customer Service admin center site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.

2. In **Authentication settings**, select **Manage**. The **Authentication settings** page appears.

3. Select **New Authentication Settings**, and provide the following information on the **Add authentication setting** page:

   - **Name**: Enter a name for the authentication setting.
   - **Channel type**: Select **Voice call**.
   - **Authentication type**: **Gatekeeper Biometric Authentication** is selected and not editable.

4. Select **Next**.

5. On the **Details** page, enter the following information:

   - **Endpoint region**: Is selected as US and not editable.
   - **Client ID**: The Nuance Gatekeeper client ID.
   - **Client Secret**: The Nuance Gatekeeper client secret.
   - **Scope ID**: The Nuance Gatekeeper scope ID.
   - **Config Set ID**: The Nuance Gatekeeper config set ID.

6. Save and close.

Apart from the default ID, you can optionally configure another ID to uniquely identify the contact between the Omnichannel and Nuance platforms. Do the following steps to configure another ID:

1. On the **Create new authentication setting** page, expand **Gatekeeper integration advanced settings**.

2. Select **Contact (ContactId)** and **Account (AccountId)** in **Contact** and **Account** fields.

   > ⓘ **Note**
   >
   > You can't edit the contact and account fields after the authentication setting is created.

After you select save and close, the components will be provisioned and your settings tested. Errors at this step means either the settings aren't correct, or the Azure Communication Services resources are running in a different Azure tenant from your Dynamics 365 environment.

Configure a workstream and authentication option

In Customer Service admin center, do the following steps:

1. Select an existing voice workstream or perform the steps in Create and manage workstreams to create a voice workstream.
2. Edit the phone number setting of the voice workstream, and select the **Behaviors** tab.
3. Scroll down and turn on the toggle for **Authentication (preview)**.
4. Select the authentication option for Gatekeeper in **Authentication setting** and select **Save**.

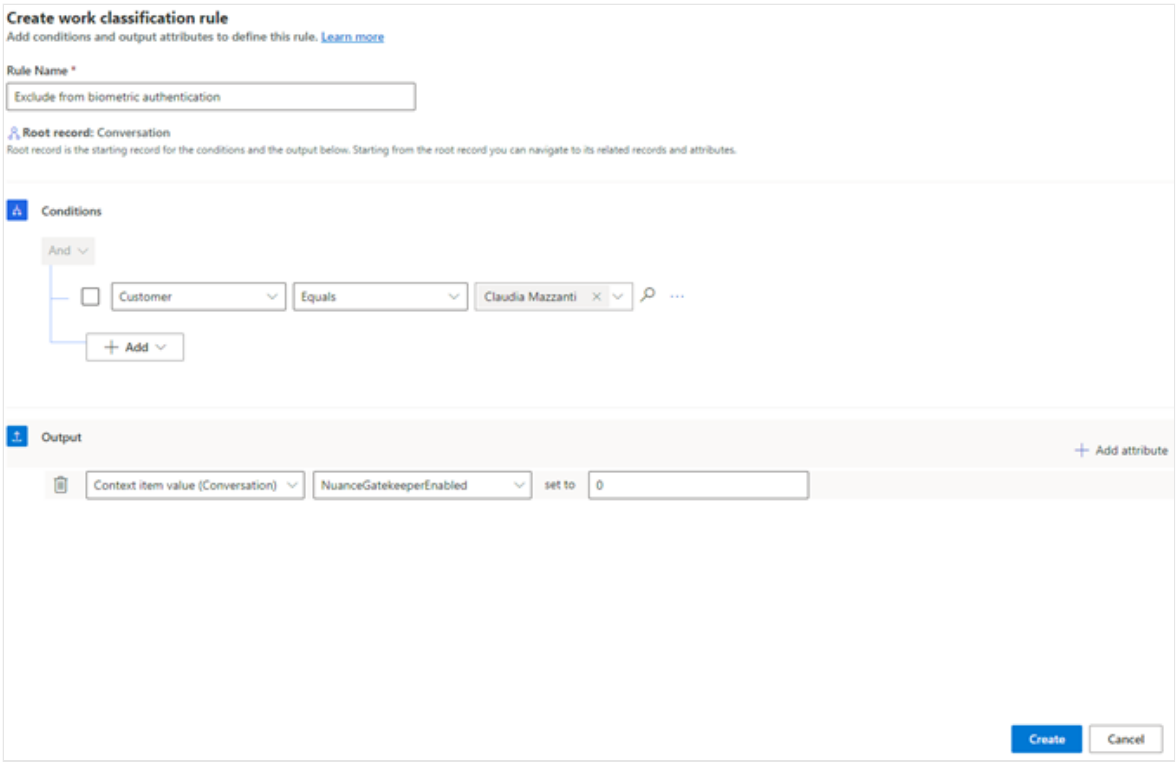
Exclude a conversation from being authenticated

You can configure classification rules to exclude a conversation from the authentication process.

Do the following steps:

1. Configure a context variable with the name "NuanceGatekeeperEnabled" and of the Number type.

2. Configure a work classification rule for the workstream through which the conversation will be handled. Ensure that the output value for the context variable is set to zero. When it’s set to zero, the conversation is excluded from the authentication process.



> **Note**
>
> The routing rule isn't evaluated for transferred calls or supervisor-assigned calls.

How the conversation is excluded from authentication process

If you have configured the setting to exclude a particular customer call, when the call comes, on the communication panel, the agent will see a message that authentication is unavailable for the call or the authentication is not available by design.

Next steps

Configure digital contact center for Nuance Gatekeeper integration

See also

Introduction to Nuance Gatekeeper integration

Enroll customers in biometric authentication using Nuance Gatekeeper (preview)

Article • 07/31/2023

> **Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Enroll customers in biometric authentication

When the agent picks up a customer call, if the customer is new, the following actions happen:

- Agent creates a customer profile.
- Asks the customer if they can be enrolled in Nuance authentication.
- The agent needs to ask for explicit consent to record the customer's voice.

If the customer agrees to enroll and gives consent, the agent selects **Enroll**. The following events occur:

- The bot states that audio capture is starting. The agent informs the customer that the audio capture will start.
- The agent starts the audio capture for the customer.
- The agent can see the visual display of the enrollment progress.

The agent can then go on to address the customer issue.

If the customer declines to be enrolled in the Nuance Gatekeeper authentication, the agent selects the opt-out option and selects an opt-out reason that's displayed for the agent.

Authenticate customers using Nuance Gatekeeper

Customers who are enrolled in biometric authentication are validated automatically through the Gatekeeper feature when they call.

If the enrolled customer doesn’t pass the biometric authentication, the agent receives a “no match” response from Nuance Gatekeeper. If the agent suspects a fraud attempt, they flag the conversation as suspicious.

If the agent has flagged a conversation as suspicious, the fraud detection analyst analyzes it and adds the caller’s voice to the suspected fraudsters watch list.

Nuance Gatekeeper checks for fraud and will notify the agent about a potential fraud if it detects a voice that's flagged as a known suspicious caller.

See also

Introduction to Nuance Gatekeeper integration

Forward Teams calls to your digital contact center

Article • 07/11/2023

If an agent isn't available when a customer calls a Microsoft Teams number in your voice channel, the call can be automatically forwarded to your organization's digital contact center. Standard charges for Teams calls apply to forwarded calls. Calls that are forwarded to your digital contact center numbers are charged based on the PSTN inbound rate.

To turn on call forwarding:

- Set up auto attendants.
- Set up call queues.

How call forwarding in Teams works

When a Teams call is forwarded to the digital contact center, the contact center agent sees the phone number the customer called from. If the customer is in Dynamics 365, more contact details are provided.

Call forwarding is supported in the following scenarios:

- **Calls to Teams user numbers**
- **Calls to auto attendants**
  Calls can also be forwarded directly to the digital contact center number without the auto attendant flow.
- **Calls in call queues**
  To forward the calls in a queue, enable the following settings in the Microsoft Teams admin center:
  - To forward all calls, set **Call overflow handling** > **Maximum calls in the queue** to 0. The default is 50 and the maximum is 200.
  - To forward calls that have been in the queue longer than five minutes, set **Call timeout handling** > **Maximum wait time** to five minutes.

See also

Introduction to the voice channel
Identify customers automatically

Configure voicemail to manage inbound calls

Article • 10/27/2023

Voicemails help your customers record messages for agents when they come across long wait times or their direct calls to agents are unanswered. You can reduce on-hold calls when customers communicate their concerns promptly through voicemails and call back later for a status check.

The salient features of voicemail are as follows:

- Callers can record voicemails for up to five minutes only.
- If you don't want to use the out-of-the-box prompt for the voicemail, you can customize it in the automated message or workstream settings.
- Voicemails are always transcribed irrespective of whether you've enabled the voice call transcription.
- If the customer is unable to record the voicemail, an automated message plays for the customer that informs them that the system couldn't record their voicemail and they should call back again.
- The bot can't offer to take a voicemail. The call must be escalated to an agent. The system offers the voicemail option if the agent isn't available.

Prerequisites for voicemail

The prerequisites are as follows:

- You must be on the latest version of the product to use voicemail.
- Unified routing is enabled. More information: Provision unified routing
- To open a voicemail, agent presence must load. More information: Manage presence status

Configure voicemail to manage overflow of voice calls

You can redirect the caller to record a voicemail for the agent when an incoming call reaches the voice queue and the queue is in one of the following conditions:

- Exceeds a defined number of calls that are waiting in the queue
- The call comes during the after hours of the call center operations

- Exceeds the estimated wait time

For information on how to configure the conditions and actions, go to Manage overflow of work items in queues.

You can also configure overflow override in the route-to-queue rule of a workstream.

Out of the box, **Default Group Voicemail Workstream** is available to route the group voicemails to the default group voicemail queue.

You can configure routing rules to route voicemail that your customer has recorded on your organization's phone number. In the rule condition, select **Organization phone number** in **Work classification** or **Create Intake rule** and add the required phone number to route the voicemail. When you define the intake or classification conditions, specify the following settings:

- The phone number with the country/region code, if you select the **Equals** operator.
- The phone number without the country/region code, if you select the **Contains** operator.

The following considerations apply:

- To route voicemails, avoid defining rules based on skills or sentiment category for the missed conversation attribute because the rules might not work as expected.
- You can't route voicemails to voice queues because the system categorizes them as records.

Use voicemail to manage direct calls to agents

If an agent misses a direct call and voicemail is configured, the system presents an option to the customer to record a voicemail. The agent might not answer the call because of one of the following reasons:

- Agent has rejected the call
- Call timed out
- Agent presence shows as "offline" or "do not disturb"

Out of the box, **Default Individual Voicemail Workstream** is available to route the individual voicemails to the default individual voicemail queue.

Configure voicemail views in inbox for agents

1. In Customer Service admin center, in the site map, select **Workspaces** under **Agent experience**.
2. Select **Manage** for **Agent experience profiles** and select the profile that you want to edit.
3. Edit the inbox and enable it.
4. Select **Add**.
5. On the **Add a new view** dialog, enter the following details:
    - **Name**: Name for the view.
    - **Agent visibility**: Select Show.
    - **Record type**: Select **Voicemail**.
6. In the **Settings** dropdown list, select one or all of the following options:
    - Assigned
    - Unassigned
    - Resolved

More information:

- Configure the inbox
- Create and use agent experience profiles

How voicemail works

The voicemail record is set up for routing out of the box. Voicemails are categorized into individual and group voicemails.

Individual voicemails

Individual voicemails are triggered through direct inward dialing and are routed to the default individual voicemail workstream.

- The workstream routes the voicemail to the individual voicemail queue.
- By default, the individual voicemail queue has no agents.
- The custom assignment rule assigns the voicemail to an agent based on their direct inward call number.
- The assignment method is round robin.
- You can add all your agents who are configured for direct inward dialing to the individual voicemail queue. The voicemails left for their numbers are automatically

assigned to the agents.

Group voicemails

If an overflow condition of a queue triggers the voicemail, it's routed to the default group voicemail workstream, which is a pick workstream.

- The workstream routes the voicemail to the default group voicemail queue.
- By default, the queue has no agents. Add those agents to the queue who triage voicemails.
- The assignment method is highest capacity.
- Voicemails left for every voice queue are routed to the group voicemail queue.
- For a more elaborate routing set up for voicemails, configure the required voicemail queues and route-to-queues rules to route to these queues.
- The operating hours at the workstream level override the queue-level overflow setup. The operating hours message at the workstream level is played and the system disconnects the call.

Manage voicemail capacity

By default, the voicemail workstream capacity is set to zero.

However, if you let voicemails take up capacity, the capacity restriction applies for group voicemail workstreams of push type only and not the default pick workstreams. In all cases, if an agent is at nil capacity and picks a work item, the work item is still assigned to them even if all their capacity is consumed.

Because the individual voicemail workstream has a custom assignment rule, capacity isn't taken into account, and voicemails are always pushed to the agent corresponding to the direct inward dialing number.

Supervisors can view the voicemails on the **Omnichannel Ongoing Conversations Dashboard**.

View the default settings

1. In Customer Service admin center, select **Routing** in the site map, and then select **Manage** for **Setup record routing**. Voicemail is listed under **Record types** on the page that appears.

2. Select **Voicemail**. The **Voicemail routing hub** page displays the following default settings:

- **Intake rules**: The rules check whether the voicemail is for individual or group and then routes the voicemail accordingly.
  - **Route to Individual Voicemail Workstream**: The rule routes the voicemail to **Default Individual Voicemail Workstream** if the voicemail type is individual.
  - **Route to Group Voicemail Workstream**: The rule routes the voicemail to **Default Group Voicemail Workstream** if the voicemail type is group.
- **Workstreams**
  - **Default Individual Voicemail Workstream**: Contains the settings to handle individual voicemails.
  - **Default Group Voicemail Workstream**: Contains the settings to handle group voicemails.

See also

Overview of voice channel
Overview of unified routing
Configure routing for the voice channel
Manage overflow of work items in queues
Manage voicemails
Configure direct callback
Omnichannel Voicemail dashboard

Configure direct callback

Article • 10/27/2023

Direct callback enables customers to request a callback as soon as an agent is available instead of waiting on the call. You can configure the direct callback option at the queue level by using the overflow action "direct callback" for a specific queue condition. After the call reaches the number one position in the queue, the direct callback work item is assigned to the next available agent through a notification just like any regular work item that's waiting in queue. Except that the notification identifies the work item as a callback versus a regular inbound call. After the agent accepts the work item, a callback to the customer who requested a direct callback is automatically initiated and connected to the agent. In summary, direct callback helps provide better customer experiences by avoiding waiting in queue and helps administrators staff queues more efficiently to handle peak volume periods.

Prerequisites for direct callback

The following prerequisites must be met:

- Voice queues and workstreams must be created. More information: Set up inbound calling
- Agents must be configured for the queues. More information: Create queues and add users
- Unified routing must be enabled. More information: Provision unified routing

Configure direct callback to manage overflow of voice calls

The customer disconnects the call after acknowledging the message for the direct callback offer. Direct callback can be the action when the queue is in one of the following conditions:

- Exceeds a defined number of calls that are waiting in the queue
- Exceeds the estimated wait time

Direct callback uses two automated messages that are available by default and can be customized:

- The initial message offers the callback option to the customer as follows: "Current wait times are longer than expected. If you would like a call back, please press 1 or

continue to wait for the next available agent."
- The second message confirms the callback selection when the customer presses 1 and notifies the customer that the call will end. The message played to the customer is, as follows: "You have requested a callback. We will call you back as soon as an agent is available. Goodbye!"

For more information, go to Configure automated messages. For information on how to configure the conditions and actions, go to Manage overflow of work items in queues.

You can also configure overflow override in the route-to-queue rule of a workstream.

How direct callback works

The direct callback is triggered by the queue overflow conditions where the corresponding action is direct callback.

1. The system presents an automated message to the customer that asks if they prefer a callback by the agent instead of waiting in the queue. The first automated message plays after the customer waits for 30 seconds and then repeats after every 120 seconds until one of the following actions takes place:
    - The customer selects the option
    - Ends the call
    - The customer is connected to an agent
2. If the customer acknowledges the callback option by pressing 1, a second message is played for the customer that acknowledges the customer choice and lets the customer know about receiving a callback.
3. The call ends for the customer but the work item remains in the queue.
4. When the work item reaches the position 1, a voice callback is initiated automatically.
5. The callback is of the type preview dialing, in which the agent has to accept the callback using a callback-specific notification before the call is dialed.

Next steps

Manage overflow of work items in queues

See also

Overview of voice channel

Overview of unified routing

Configure routing for the voice channel

Configure voicemail

Configure outbound and inbound profiles

Article • 09/21/2023

Use the information in this article to create profiles that will be used during inbound and outbound calls directly to or from agents. These profiles help you configure settings, such as language, wait music, and transcription settings for the calls. The profiles that you create are listed on the **Outbound and inbound profiles** page. The **Profile type** column helps distinguish the profiles.

Inbound profiles enable direct calls to individual agents and therefore differ from workstreams that are used to define how inbound calls are routed and assigned to agents via queues. Direct inbound calling doesn't use unified routing and therefore the direct calls aren't tracked in unified routing historical analytics.

Prerequisites

The following prerequisites must be met:

- To create inbound profiles, a personal number of geographic type enabled to receive calls must be provisioned and assigned to the agent via the **Omnichannel** tab in user settings. More information: Manage phone numbers
- To create outbound profiles, shared or geographic type numbers enabled for outbound calls must be configured and available in the system. In your calling plan for the number, the **Make calls** checkbox must be selected.
- Capacity profiles to be used in profiles must be configured. Manage capacity profiles
- Voice queues must be configured. More information: Configure voice queues

Create inbound profiles

1. In Customer Service admin center, in the site map, select **Productivity** in **Agent experience**.
2. On the **Productivity** page, select **Manage** for **Outbound and inbound profiles**.
3. Select **New profile**.
4. On the **Create new profile** dialog, enter a profile name, select the profile type as **Inbound**, and then select **Next**.

5. On the **Phone number** page, select a personal number in the **Number** list, and select **Next**. You can add only one phone number at a time while creating a profile.

6. In **Inbound info**, select a queue and one or more capacity profiles in the **Queue** and **Capacity** dropdown lists, and then select **Next**.

7. In **Inbound behaviors**, configure the following settings:

- **Language**: Accept the default language as **English - United States** or select a language from the list.
- **Hold music**: Select a music to play when the call is on hold.
- **Wait music**: Select a music to play when the call is in waiting.
- **Call transfer to external phone number**: Set the toggle to **On** if you want the agents to transfer the call to a phone number outside of your organization.
- **Consult with Microsoft Teams user**: Set the toggle to **On** if you want the agents to consult or transfer the voice calls to subject matter experts on Microsoft Teams.
- **Transcription and recording**: Select whether you want to transcript the call and record it. Select **None** if you don't want to.
  - **Start setting**: Is enabled when you select transcript or transcription and recording. Set to Automatic if the call recording and transcription needs to start immediately.
    - **Allow agents to pause and resume**: Is enabled when you set the **Start setting** to Automatic. Set to **Yes** to let agents pause and resume the recording and transcription.

1. Select **Next**, verify the settings, and select **Save and close**.

Create outbound profiles

You can define the way outbound calls are made and also who can make them.

1. Perform the steps 1 through 3 in Create inbound profiles.

2. On the **Create new profile** dialog, in the **Profile settings** section, enter a profile name in **Profile name**, select **Outbound** in **Profile type**, and select **Next**.

3. In **Phone number**, select a phone number in the **Shared numbers** list, and select **Next**.

> **Note**
>
> The phone numbers list shows only those numbers that are enabled for outbound calling and aren't used as a personal phone number. If you don't

see any numbers in the list, **configure a number for outbound calling**.

4. In **Outbound info**, do the following:

   - **Number label**: Enter a label to denote the business context, like Billing, that's displayed with the phone number at the agent end when they call a customer. This value is automatically populated with the phone name string on the agent dialer that the agent can edit.
   - **Queue**: Select a queue from the dropdown list.
   - **Capacity**: Select one or more capacity profiles from the dropdown list.

5. In **Outbound behaviors**, do the following:

   - **Allow list for countries/regions**: Select the countries whose numbers your agents can call. If an agent has multiple outbound profiles, they'll see a list of countries that have been selected in all profiles.

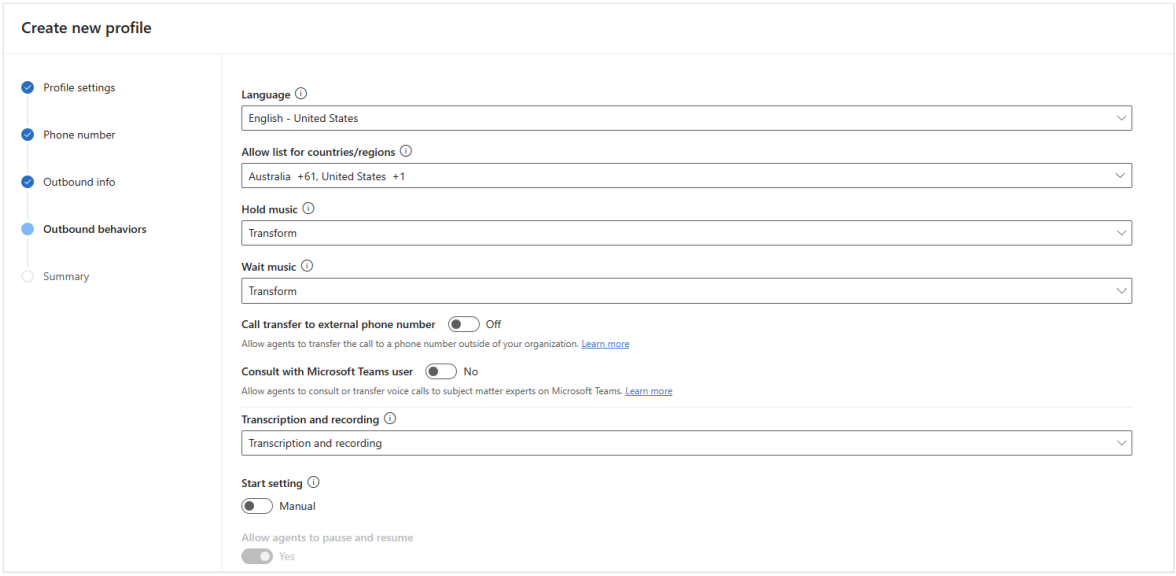
     > ⓘ **Note**
     > - The **Allow list for countries/regions** is an early access feature. You can opt in early to enable these features in your environment, which will allow you to test these features and then adopt them across your environments. For information about how to enable these features, see **Opt in to early access updates**.
     > - In **Power Apps**, add the **Enhanced outbound dialer experience** setting definition to enable the enhanced outbound dialer, and then set the **Setting environment value** to **Yes**. More information: **Add an existing setting definition**.

   - **Hold music**: Select a music file that you want played when the customer is put on hold during a call.
   - **Wait music**: Select a music file that you want played when the customer is waiting to get into a call.
   - **Call transfer to external phone number**: Set the toggle to **On** if you want the agents to transfer the call to a phone number outside of your organization.
   - **Consult with Microsoft Teams user**: Set the toggle to **On** if you want the agents to consult or transfer the voice calls to subject matter experts on Microsoft Teams.
   - **Transcription and recording**: Select **None**, **Transcription only**, or **Transcription and recording**, based on your business scenarios and requirements. As an administrator, you may want to set the value to **None** for

business transactions like customer billing where you don't want to record financial data.

- **Start setting**: Indicates whether you want to start transcription and/or recording when the call begins. The default value is **Automatic**, which means transcription and recording will automatically begin at the start of the conversation.
- **Allow agents to pause and resume**: Indicates whether you want to allow your agents to pause and resume call transcription and recording. The default value is **Yes** which means that your agents can choose when to pause or resume call transcription and recording in the conversation panel.

6. Select **Save and close**.



Default profiles

The default profiles are available out of the box if you use the first-run experience in the new organization. Some of the features are as follows:

- The default profiles are used as fallback profiles when agents aren't assigned a profile.
- You can edit the behavior and templates only but not the profile type for the default profiles.
- The locale settings for the default profiles should be same. The locale settings can be edited in one of the default profiles only and the setting will be applicable to both the default profiles.
- The phone number column for the default inbound profile is "undefined" because it's used as a default for all calls to agent phone numbers. When a customer calls, if no other inbound profile exists, the default profile is used to route the call to the

agent whose phone number is enabled for inbound calling and their capacity matches the capacity profile condition of the default profile.

Edit profiles

Edit the profiles to update the behavior and advanced settings. You can delete profiles that aren't required.

1. On the **Outbound and inbound profiles** page, select a profile from the list and select **Edit**. On the **Edit profile settings** dialog, update details in the required sections.

2. The **Advanced settings** section that's available only after you save a profile, select the default templates for session, consult notification, and transfer notification. For information on session and notification templates, see Manage session templates and Manage notification settings and templates.

3. Select **Save and close**.

See also

Overview of the voice channel
Manage phone numbers
Bring your own carrier
Set up inbound calling

Configure historical analytics for voice

Article • 03/08/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

To view the rich analytics and insights for your organization, you must enable **Omnichannel historical analytics for voice** in the Customer Service admin center or Omnichannel admin center app.

Enable historical analytics for voice

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Omnichannel historical analytics** section, select **Manage**.

   The **Omnichannel historical analytics** page is displayed. Select the **Add historical analytics for voice** check box.

2. Select **Save** or **Save & Close**.

See also

Introduction to the voice channel
Provision and set up the voice channel
View voice calls usage

Configure Power Virtual Agents bots for voice

Article • 06/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

To route customers call to the best department, diagnose issues, collect information, and give recommendations, conversational IVR bots speak to customers when they call in. Power Virtual Agents makes it easy to author IVR bots and you can use the same bots for other channels, like chat and voice.

Some of the features of the Power Virtual Agents bots for voice are as follows:

- Customizable voices in the Omnichannel for Customer Service configuration experience.
- Questions in Power Virtual Agents using "Boolean" types do not prompt users with "Options are *Yes* or *No*".
- All bot messages can be interrupted by the caller.

Prerequisites

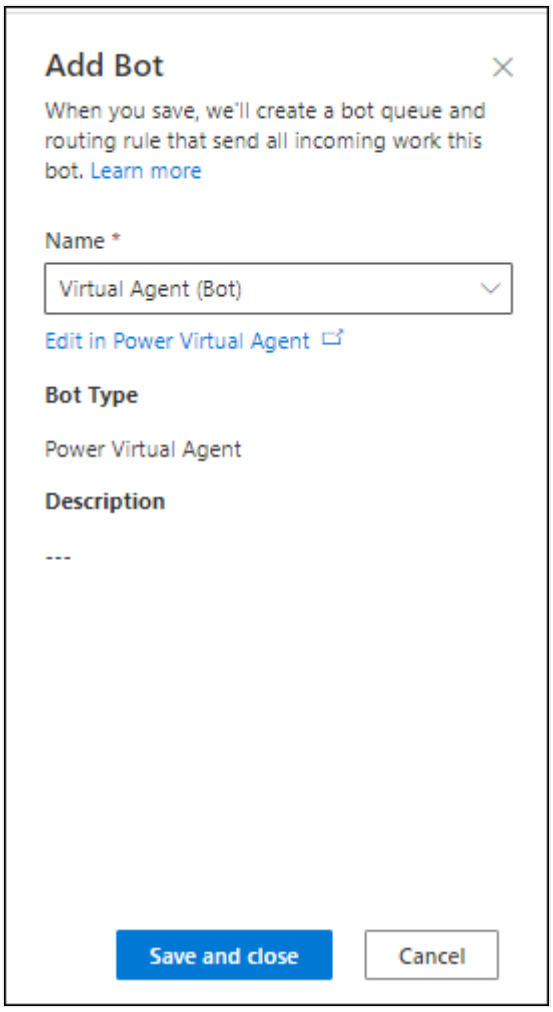
The following prerequisites must be met for the Power Virtual Agents bot:

- The bot is published, and the **Agent transfers** setting is configured by selecting **Omnichannel**. More information: Configure seamless and contextual hand-off to Omnichannel for Customer Service
- The **Enable voice** option is selected in the **Omnichannel** section of the **Agent transfers** setting.

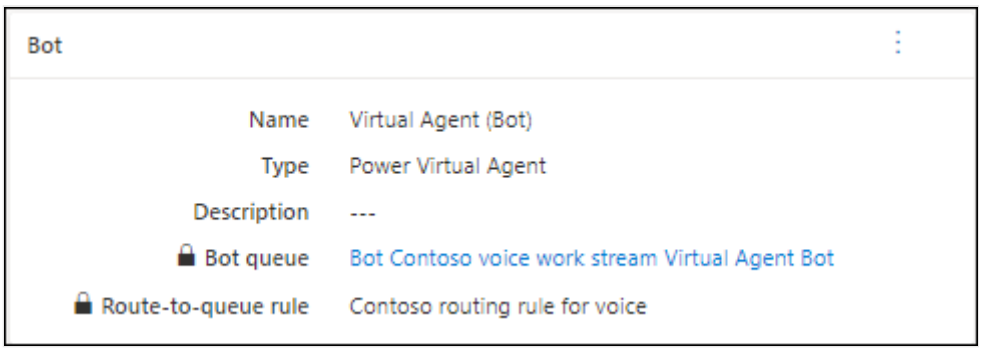
Configure a bot for voice

1. In the Customer Service admin center or Omnichannel admin center app, go to the workstream that you created for the voice channel, and then in the **Bot section,** select **Add Bot**.

2. On the **Add Bot** pane, select a bot from the **Name** box.



3. Select **Save and close**. The bot is added to the workstream.



More information:

- Author template topics in Power Virtual Agents
- Create topics and test your bot

Configure handoff from Power Virtual Agents to Omnichannel for Customer Service

1. In Power Virtual Agents, open the bot that you've configured to integrate with Omnichannel for Customer Service.

2. Go to **Manage** and select **Agent transfers**.

3. In the **Agent transfers** section, select **Omnichannel**, and on the Omnichannel panel that appears, do the following:
   a. Select **Enable**. One of the following messages appears:

      - That Omnichannel is enabled is displayed at the top of the page.
      - If you're using Application Lifecycle Management (ALM), you might see the following message: "We can't determine if omnichannel integration is enabled for the environment". For more information, see Bots with ALM.

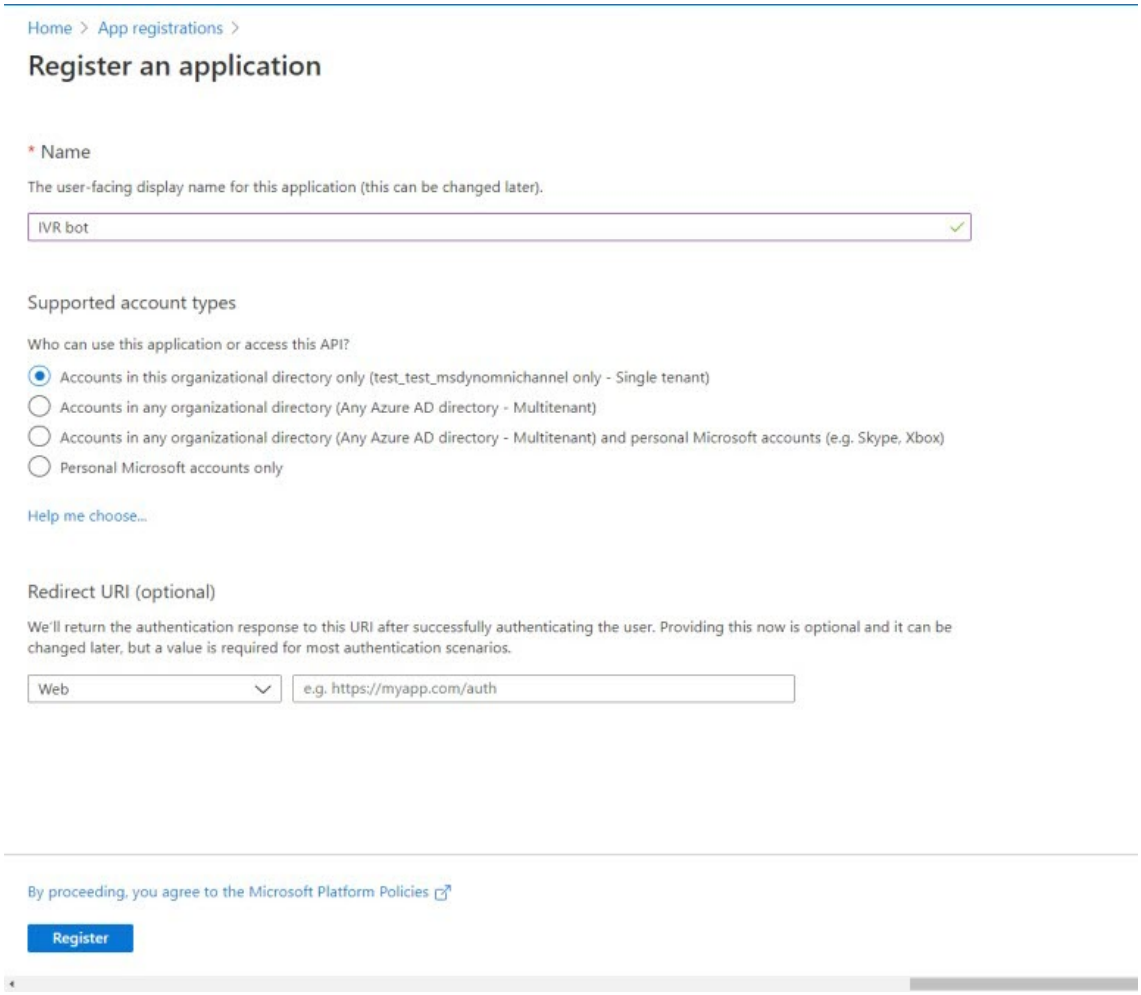
   a. Turn on the **Enable voice** toggle.

   b. Select **See how to register a new Application ID**, and follow the instructions to register an application identifier.

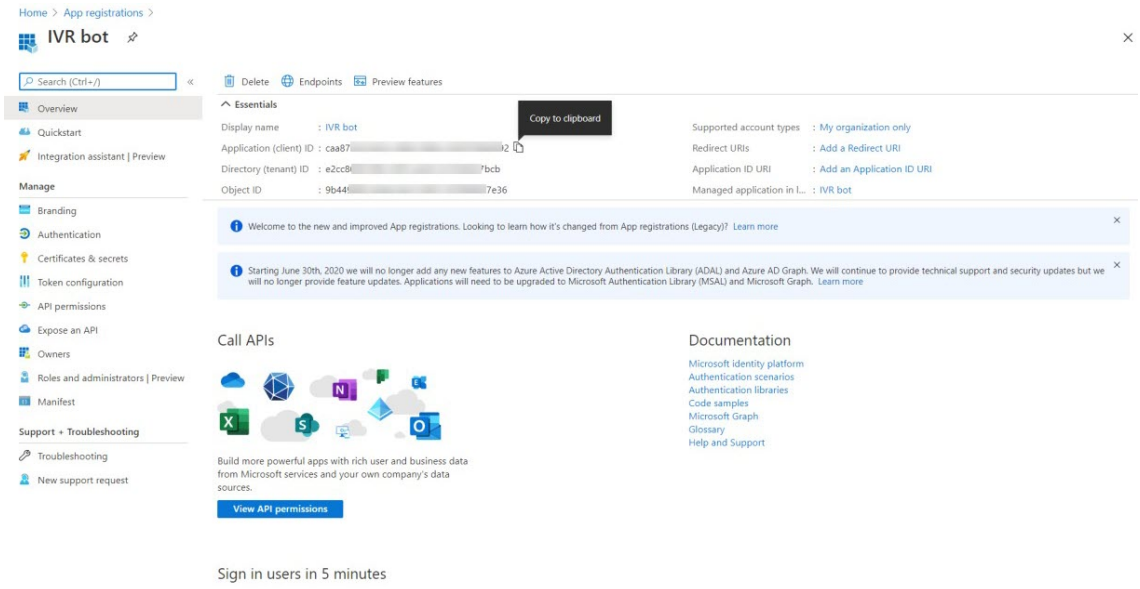
      i. Select **App Registration**.

      ii. Select **New registration**.

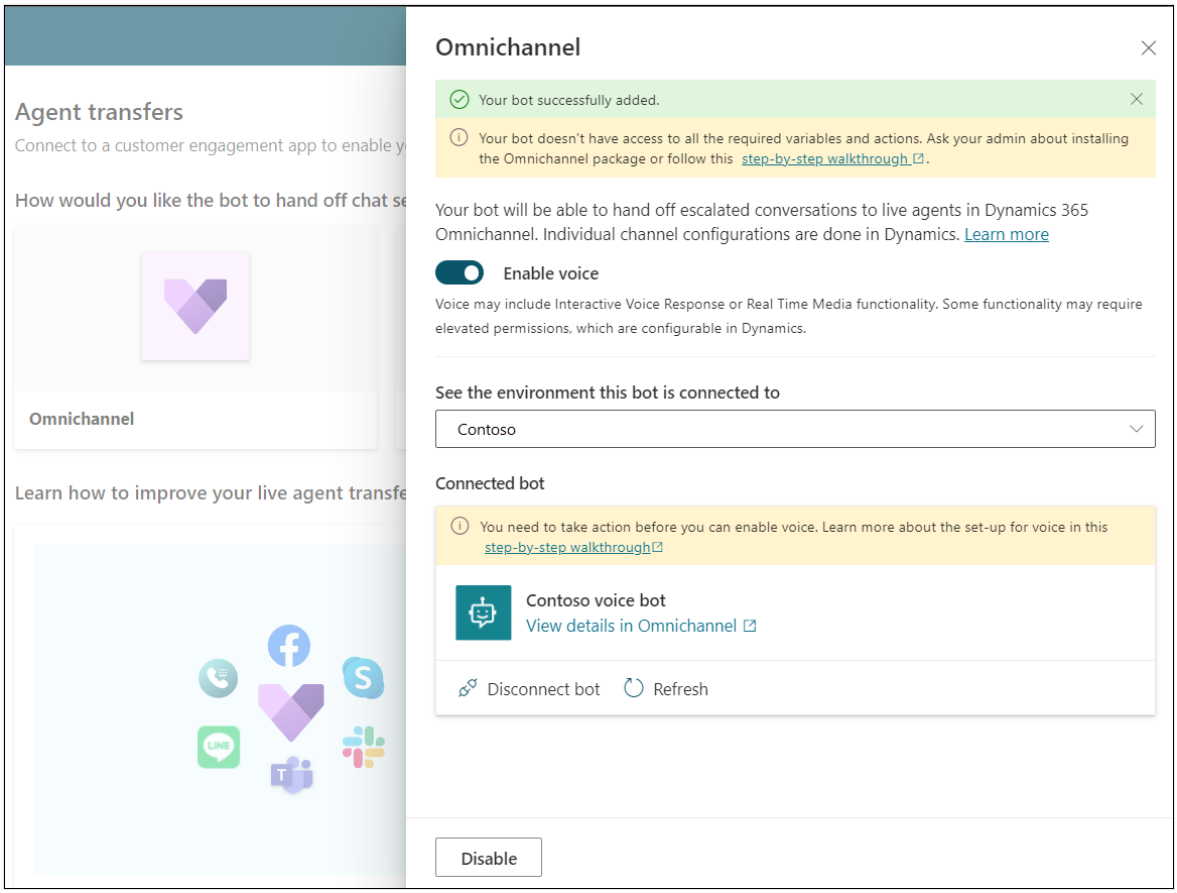
      iii. Enter the name of your bot, and then select **Register**.



i. Copy the **Application ID** to the clipboard.



c. Return to Power Virtual Agents, paste the copied ID in the **Application ID** field, and then select **Add your bot**. After the bot is added, a message is displayed and the bot is listed.



a. Optionally, you can view the bot details in Omnichannel for Customer Service.

> **ⓘ Important**
>
> In voice, we don't listen for the **closeOmnichannelConversation** context variable. You must configure an **end of conversation message** for the call to end in Omnichannel for Customer Service.

See also

Overview of the voice channel
Configure context variables
Manage your bots
Set up a multilingual bot in Power Virtual Agents

View minutes used in voice calls

Article • 04/04/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Introduction

The Voice minutes report lets Omnichannel administrators view a Power BI report in Omnichannel admin center that helps them to get insights about how many call intelligence minutes and intelligent voicebot minutes from the voice quota have been consumed.

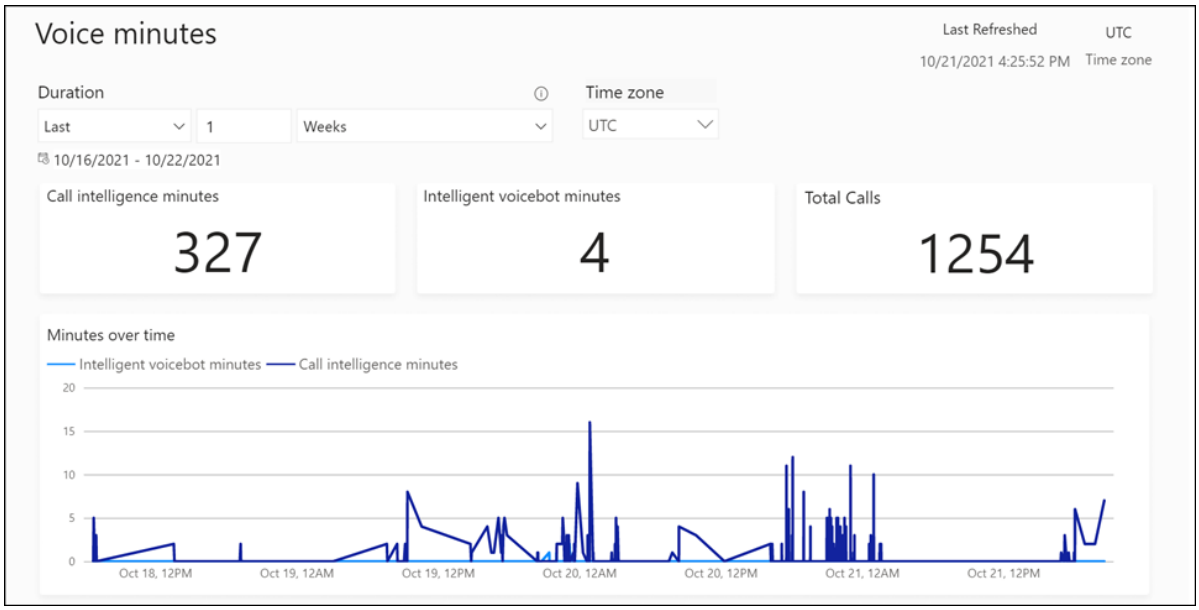
Prerequisites

- The voice channel should be configured and in use for the report to display data.
- The Omnichannel administrator role for accessing the report.

View the Voice minutes report

To view the Voice minutes report, do one of the following steps:

- In the site map of Customer Service admin center, select **Insights**, and in **Admin reports**, select **View report** for **Voice minutes**.
- In the site map of Omnichannel admin center, in **Insights**, select **Voice minutes**.



The following table contains the metrics.

Metric	Description
Call intelligence minutes	Number of minutes of calls for which call transcription is generated. Number is rounded to a whole number.
Intelligent voicebot minutes	Number of minutes used by voicebot. Number is rounded to a whole number.
Total Calls	Number of calls that consumed the minutes.
Minutes over time	Overtime trending of call intelligence minutes and intelligent voicebot minutes.

View the IVR transcripts

The **Voice details** table in the report provides the following information.

Attribute	Description
Date	Date when the conversation is logged.
Conversation ID	Identifier of the conversation record.
Type	Type of call, either "Call intelligence" or "Intelligence voicebot".
Start	Time when the recording of the minutes starts.
End	Time when the recording of the minutes stops.
Duration	Total number of minutes consumed for the current row.

Attribute	Description
Phone number	Agent phone number used in the call.
Workstream	Workstream through which the call was handled.
Call direction	Indicates whether the call was an "Incoming" or "Outgoing" one.

Slice metrics by time and time zone

The **Duration** option lets you filter the report details and affects all metrics in the report. More information: Slice metrics by time

The **Time zone** option lets you filter the report for the selected time zone.

See also

Overview of voice channel in Omnichannel for Customer Service
Intraday conversation insights

Configure a post-call survey

Article • 03/25/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Introduction

Post-call surveys help measure customer satisfaction in the contact center. Surveys are also an incentive for agents to provide high-quality service. You can configure the survey to take place immediately after the call so that customers can provide their feedback while the conversation is fresh on their minds.

You can obtain customer consent for post-call surveys as follows:

- **Automatic - implicit**: The IVR bot informs the customer about a post-call survey at the end of the call. After the agent disconnects, the call is automatically transferred to a post-call survey bot.
- **Automatic - explicit**: The IVR bot asks the customer if they want to participate in a post-call survey. The consent is saved in a `va_SurveyConsent` Boolean variable. If the customer consents, the call is automatically transferred to the post-call survey bot at the end of the agent call. If the customer says no, the call ends when the bot hangs up.
- **Agent-initiated**: Towards the end of a call, the agent can ask the customer if they want to take a survey. If the customer says yes, the agent manually transfers the call to the survey bot.

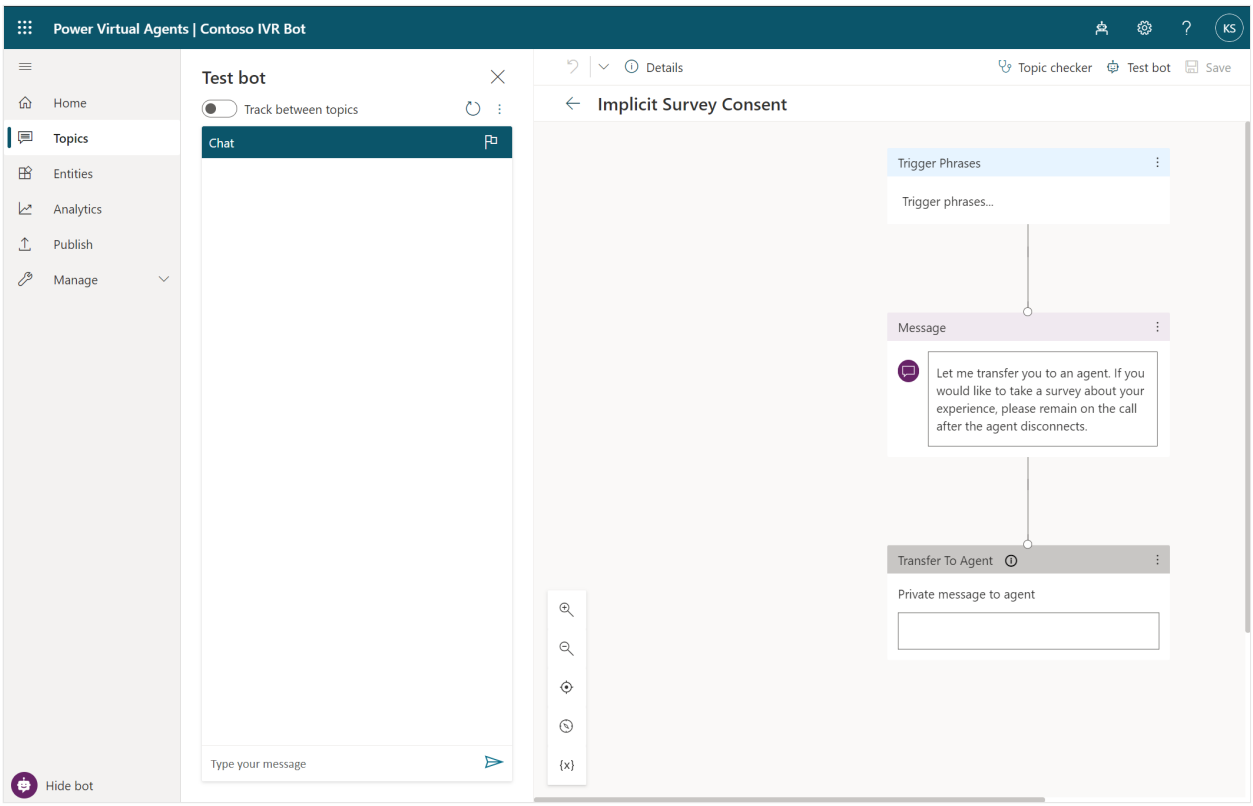
> **Note**
>
> We recommend that you have two bots if your organization wants to use Power Virtual Agents for both IVR and survey scenarios.

Create a survey bot in Power Virtual Agents

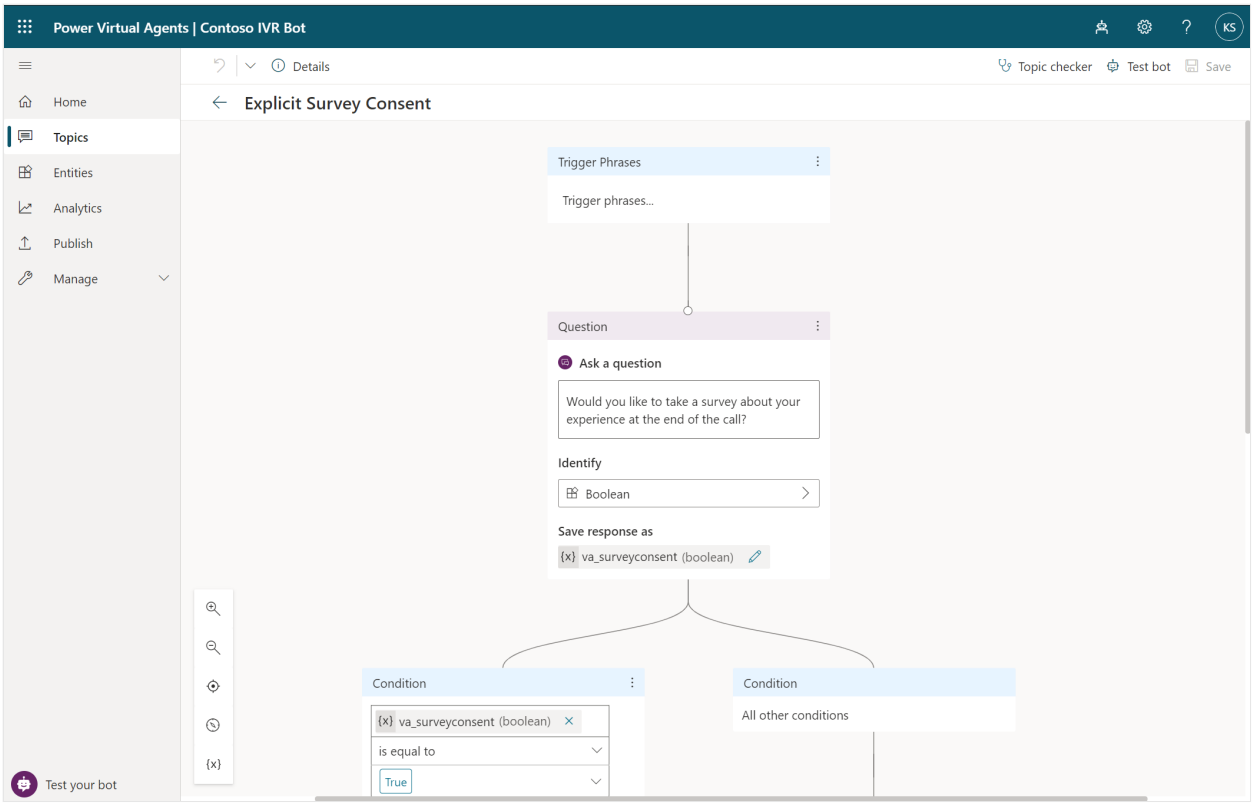
Use either Power Virtual Agents (no-code or low-code experience) or Azure bot Service (pro-developer experience).

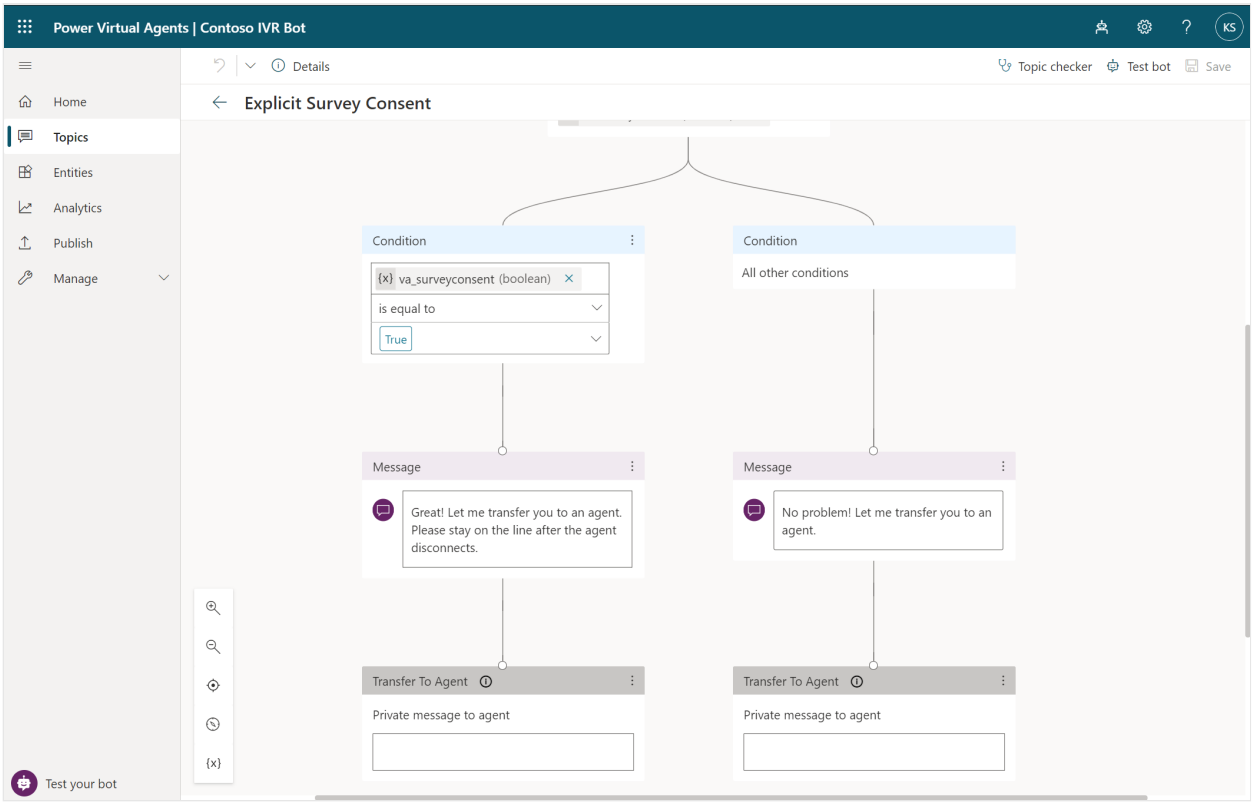
You can add messages or questions in the **Escalation** topic to obtain a customer consent for a post-call survey. Examples of the messages are as follows:

Implicit survey



Explicit survey

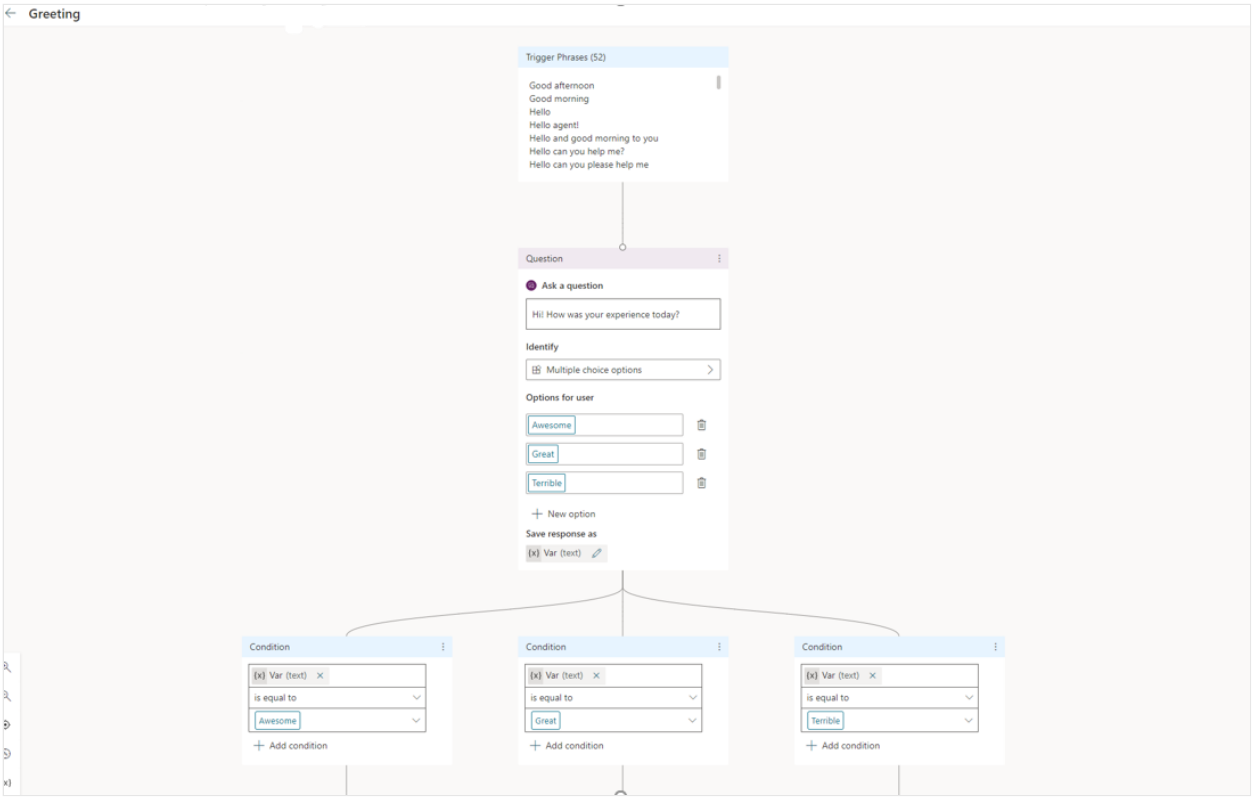


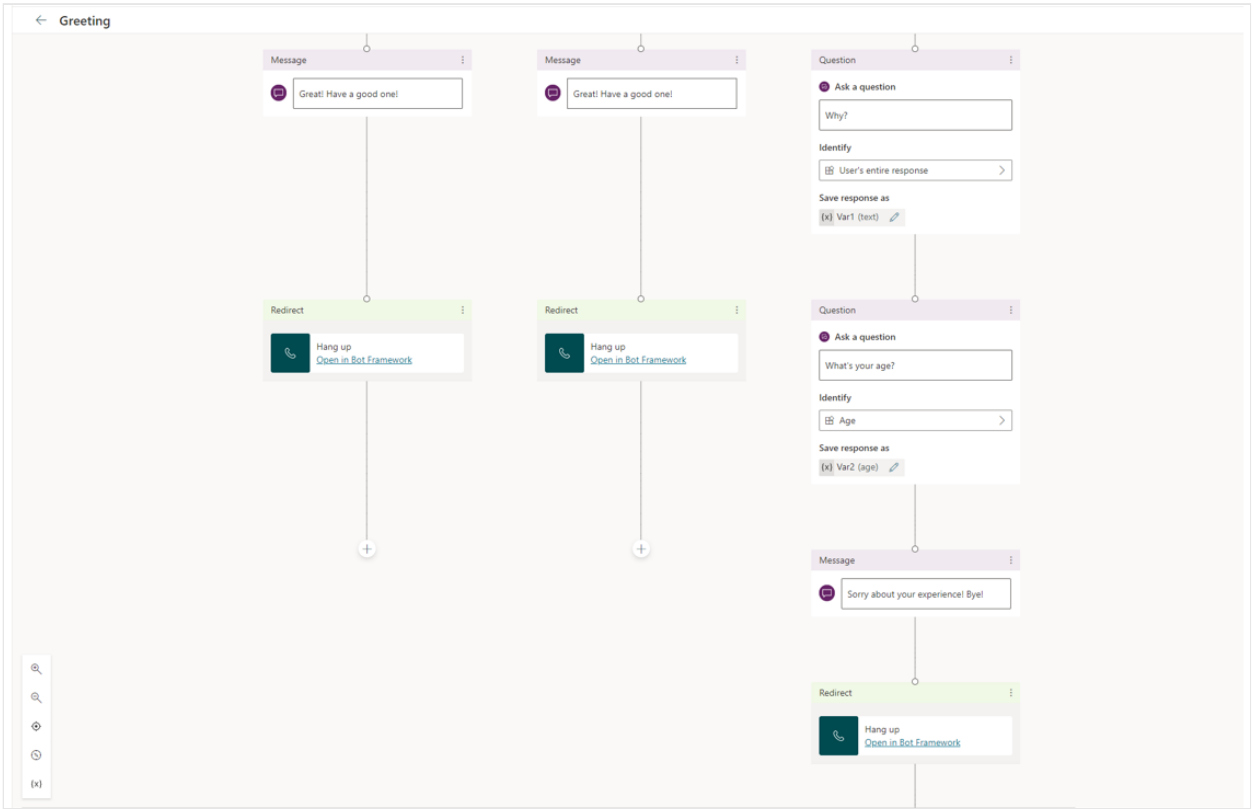


Configure a survey bot

You can add messages or questions to a Power Virtual Agents IVR bot to create a post-call survey. A bot greets the customer when the call routed to the survey queue is answered. Examples of messages or questions configured in the **Greetings** topic for the bot to greet the customer are as follows:

> **Note**
>
> We recommend that you have two bots if your organization wants to use Power Virtual Agents for both IVR and survey scenarios.





> **Tip**

The bot author can use Power Automate to implement custom business logic to decide who receives a survey (for example, the bot may decide to survey someone random, VIP customers, and so forth)

Connect your bot to Omnichannel for Customer Service

- Configure your Power Virtual Agents bot. Perform the steps in Configure handoff to Omnichannel for Customer Service and Integrate a Power Virtual Agents bot.
- Configure your Azure bot. More information: Integrate an Azure bot

Enable post-call survey in phone number settings

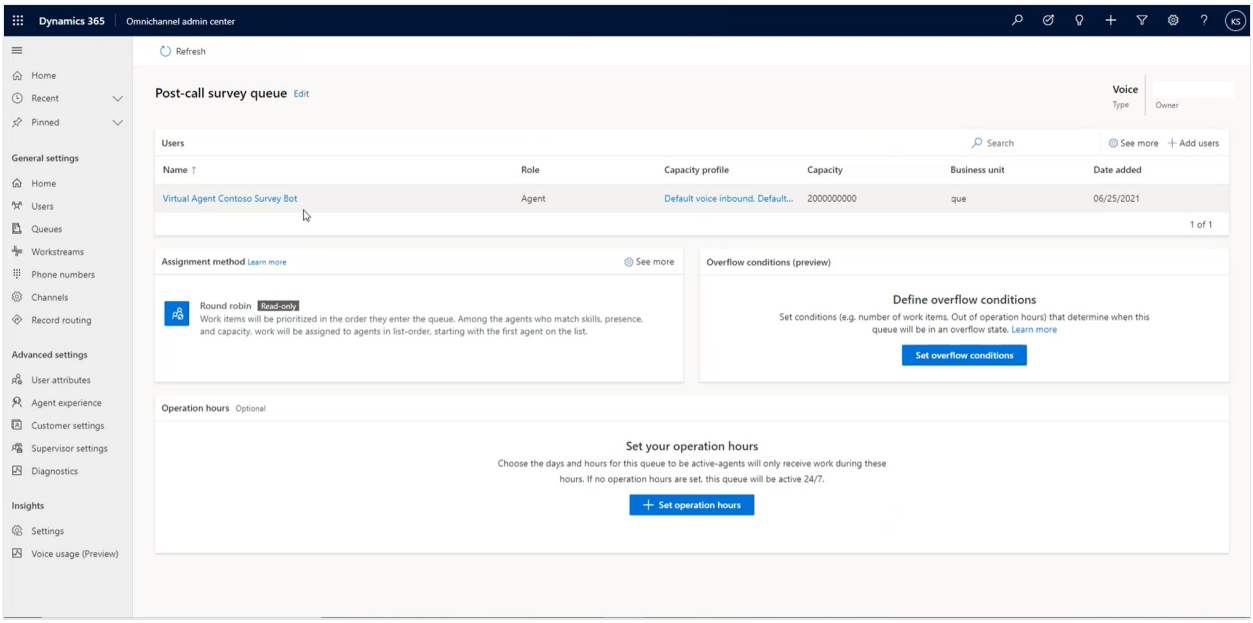
> ⓘ **Note**
>
> Enabling the post-call survey feature isn't required for the human agent initiated scenario.

To route the customer to the Power Voice Agent survey bot automatically after the agent hangs up, perform the following steps:

1. In Customer Service admin center or Omnichannel admin center, select your voice workstream, and then select **Edit** next to the pencil icon to modify the settings.
2. Under **Language**, scroll to the bottom of the dialog, and then toggle **Post-call survey** to **On**.
3. From the dropdown menu, select the survey bot.
4. Select **Confirm**.

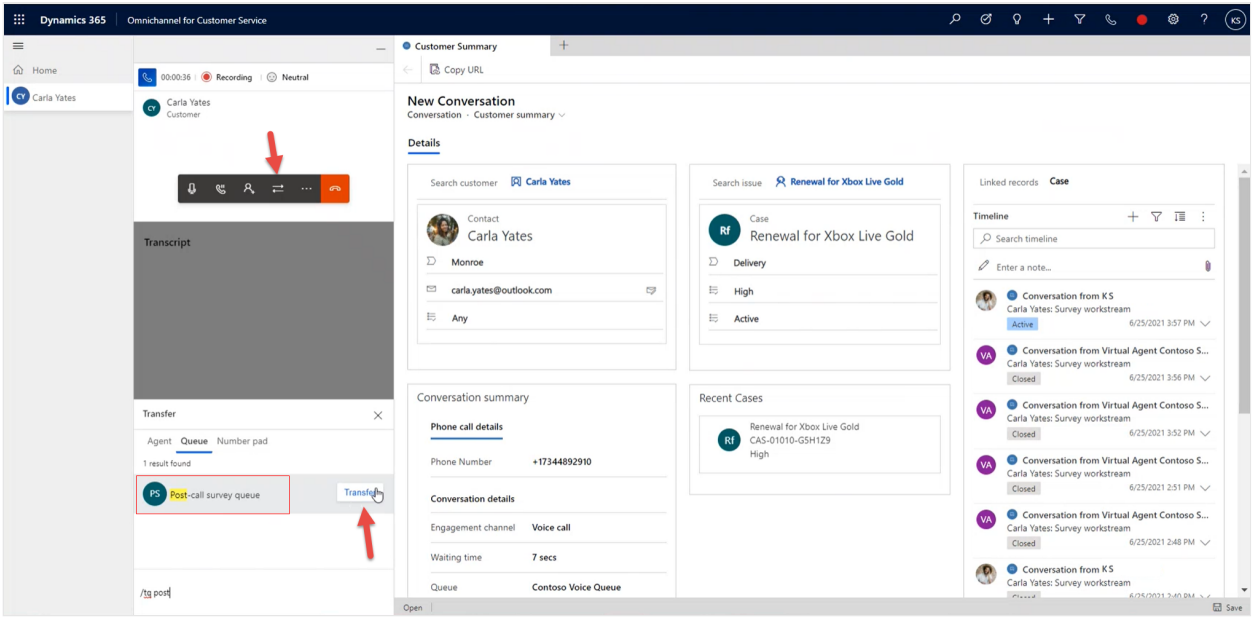
Set up human agent initiated survey

To enable agent initiated feedback, create a queue where the only agent is the survey bot user.

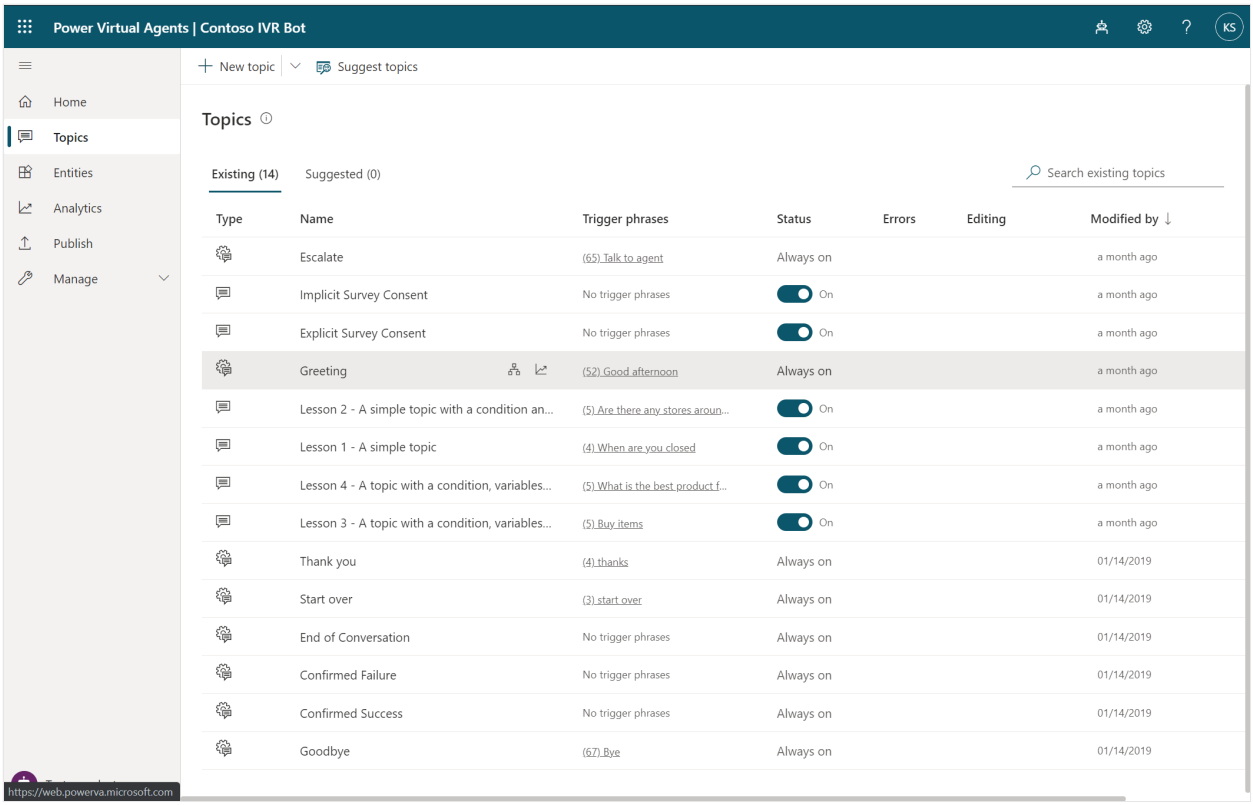


Try out the human agent initiated survey

Transfer the call to the survey queue.

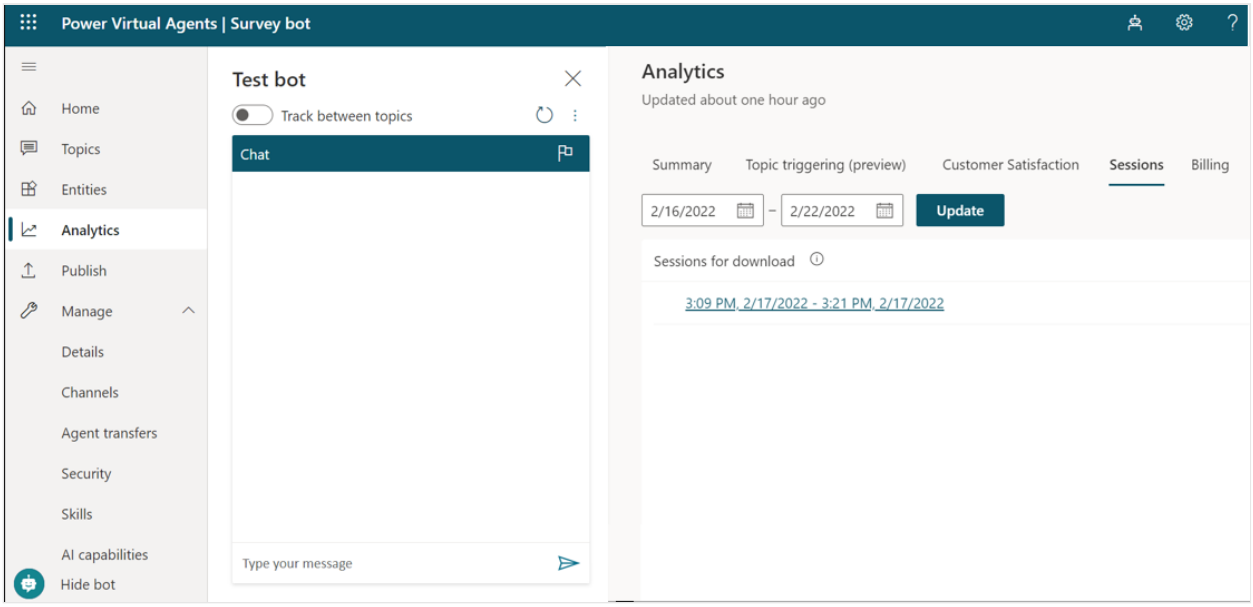


When answered, this sends the user to the bot's greeting topic.



View Survey Results

You can view the survey results on the **Analytics** > **Sessions** tab.



See also

Introduction to the voice channel
Outbound calling
Route incoming calls to agents
Integrate an Azure bot

Block spam numbers

Article • 05/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

In Omnichannel for Customer Service, as an administrator, you can block spam phone calls that your agents receive as part of their incoming customer calls. By blocking spam calls, you can help improve efficiency and productivity of agents and prevent long wait times for actual customers who are in the queues. Your agents and supervisors can also flag off incoming calls as spam, that you can later review and block as spam.

Review phone numbers marked as spam

You can review phone numbers marked as spam in the Customer Service admin center or Omnichannel admin center app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
   b. In the **Blocked numbers** section, select **Manage**.

   The **Blocked numbers** page is displayed.

2. In the **Blocked numbers** section, you can do the following:

   - **Pending review** tab - Shows the list of numbers that have been flagged as spam by your agents and supervisors. You can view the report for each phone number, and then block the specific number as spam. Select any number from the **Pending review** list, and then you can do the following:
     - **Block** - Select to block the number; the agent will no longer receive any calls from the blocked number.
     - **Remove from list** - Select to remove the number from the **Pending review** numbers list and clear the number from the spam numbers list.

    - **View report history** - Select to view the reports for the specific phone number in the **Pending review** list. You can review all spam notification reports by viewing the report history. You can visit the conversation history page to review the conversation or recordings. You can also choose to either block the number or remove the number from the pending review list.

- **Blocked** tab - Shows the list of phone numbers that have been blocked as spam.

Manually block phone numbers

1. Navigate to **Blocked numbers** and select **Manage**.
2. Select **Block a number**.
3. In the **Block a phone number** dialog, enter a phone number, add any comments if you'd like, and then select **Block this number**.

Automatically block phone numbers

You can set conditions so that some numbers are automatically added to the blocked numbers list if they match certain conditions based on the number of reports. Using the **Auto-block** option, you can also automatically block numbers if they're reported as spam, say two or more times. This not only saves time in reviewing every blocked call report received from your agents, but also helps remove any delay from your end when you have too many spam numbers to review. The auto-block option is also useful in situations or instances where there might be a surge in spam calls from different numbers.

1. Navigate to **Blocked numbers**, and select **Manage**.
2. In the **Auto-block** section, select **Set up**.
3. In the **Auto-block** dialog that appears, do the following:
    a. Enable the **Turn on auto block** toggle.
    b. Enter a value for the number of reports in the **Block reported phone numbers if they receive** field. For example, if you entered **2**, then the phone number would automatically get blocked as spam after two reports are received.
4. Select **Save and close**.

See also

Overview of the voice channel
Manage phone numbers

Configure call recording, transcription, and real-time translation

Article • 06/07/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As an administrator, you can enable live translation, transcription and recording of calls, which allows agents and supervisors to view the conversations with the customers in the language that's set as the default for them, and also transcripts of customer calls.

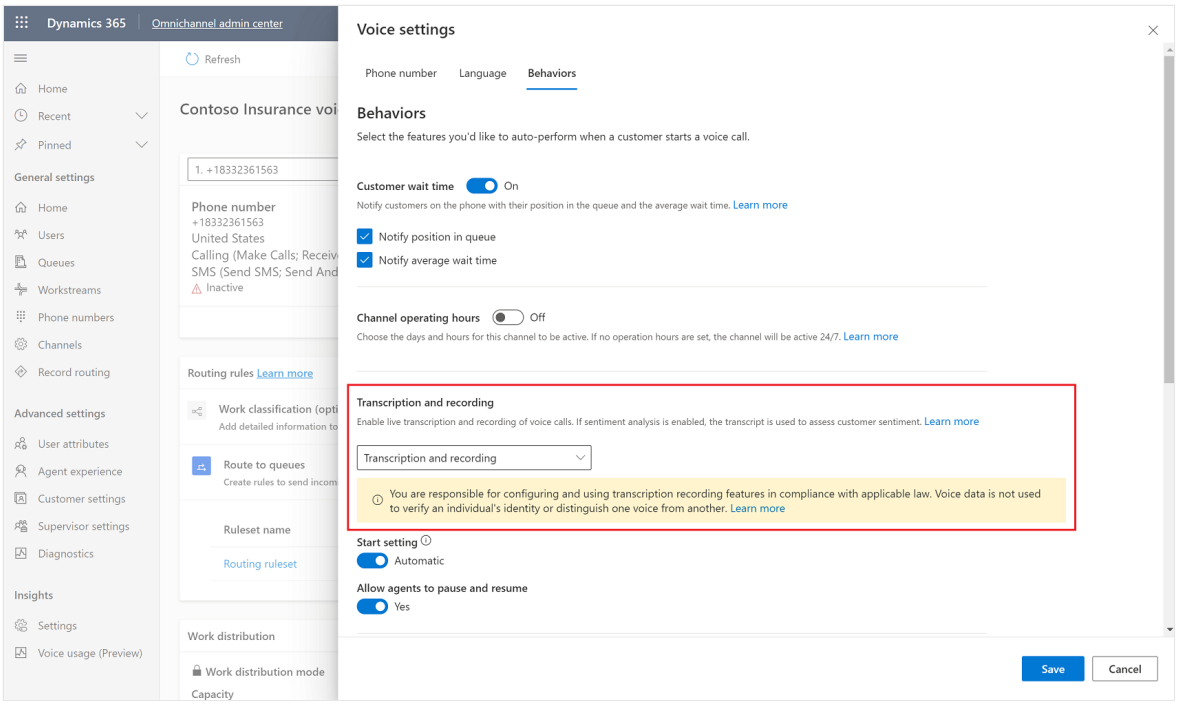
Important

- Many countries and states have laws and regulations that apply to the recording of PSTN (Public Switched Telephone Network), voice, and video calls, and may require that users first consent to the recording of their communications. It is your responsibility to use the call recording and transcription capabilities in compliance with the law. Before using call recording features, you must obtain consent from the parties of recorded communications in a manner that complies with all applicable laws for each participant.
- If you use Power Virtual Agents bots as the interactive voice response (IVR) with the voice channel, the calls are transcribed in Power Virtual Agents even if the transcription and recording setting isn't enabled in the voice workstream.

Enable call recording and transcription for voice

1. In Customer Service admin center or Omnichannel admin center, select the workstream for which you want to enable recording and transcription.
2. In the **Phone number** section, next to the pencil icon, select **Edit**.

3. On the **Voice settings** page, select the **Behaviors** tab.



4. In the **Transcription and recording** section, select the **Transcript and recording** dropdown menu, and then select **Transcription** or **Transcription and recording**.

5. Under **Start setting**, set the toggle to **Automatic** if you want calls to be automatically recorded and transcribed when they begin, or **Manual** if you want agents to record and transcribe their calls.

6. Set **Allow agents to pause and resume** if you want to allow agents to control the portions of conversations that they record and transcribe.

7. Select **Save**.

Enable real-time translation of calls

To view translated voice transcripts for calls, you must enable call recording, transcription, and real-time translation. To enable real-time translation, see Enable real-time translation for agent and customer conversations

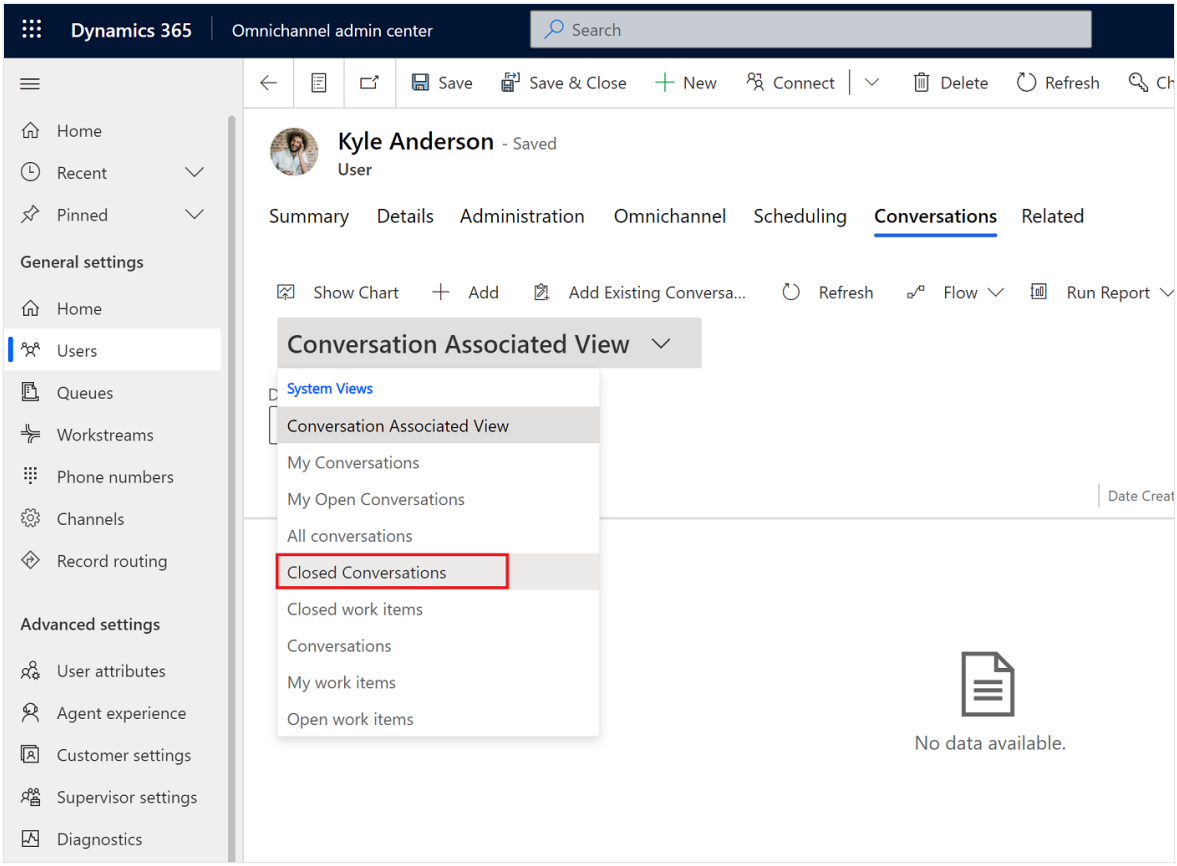
View call transcripts

You can view the call transcripts in Customer Service admin center or Omnichannel admin center.

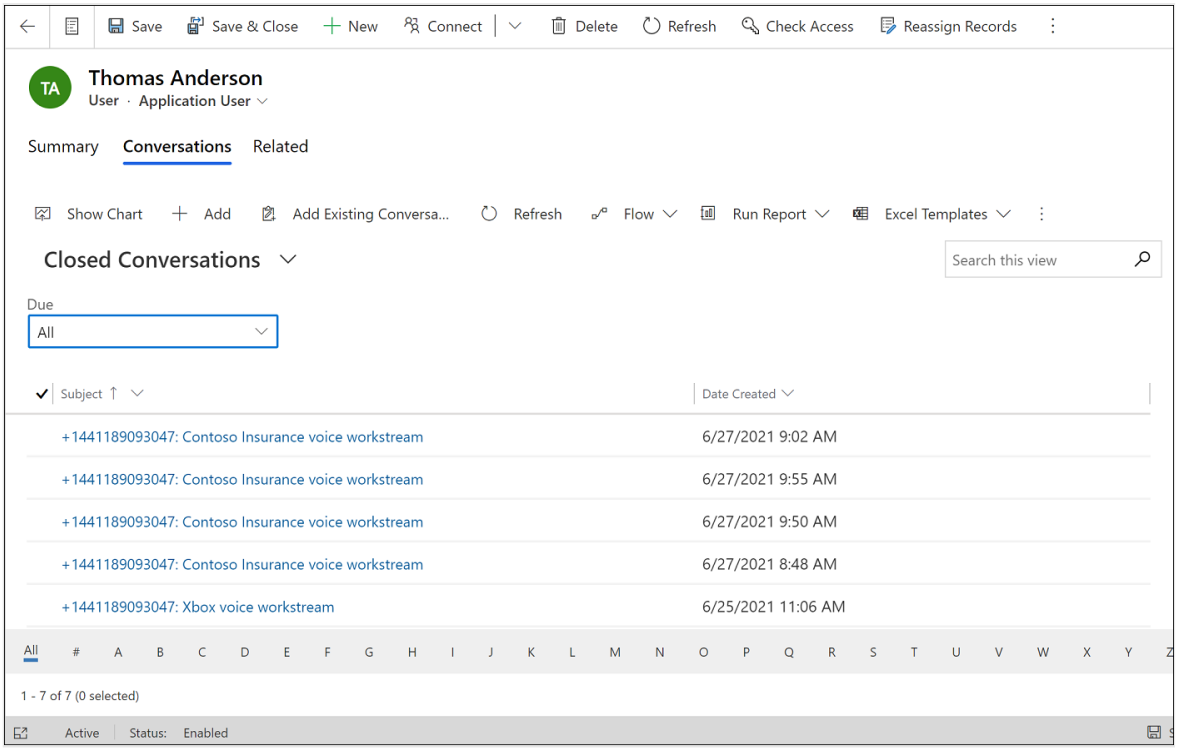
1. In Customer Service admin center or Omnichannel admin center, go to manage **Users**, and then select the user whose conversations you want to view.

2. Select the **Related** tab, and then select **Conversations** from the dropdown menu.

3. Select **Closed conversations** from the dashboard dropdown menu.

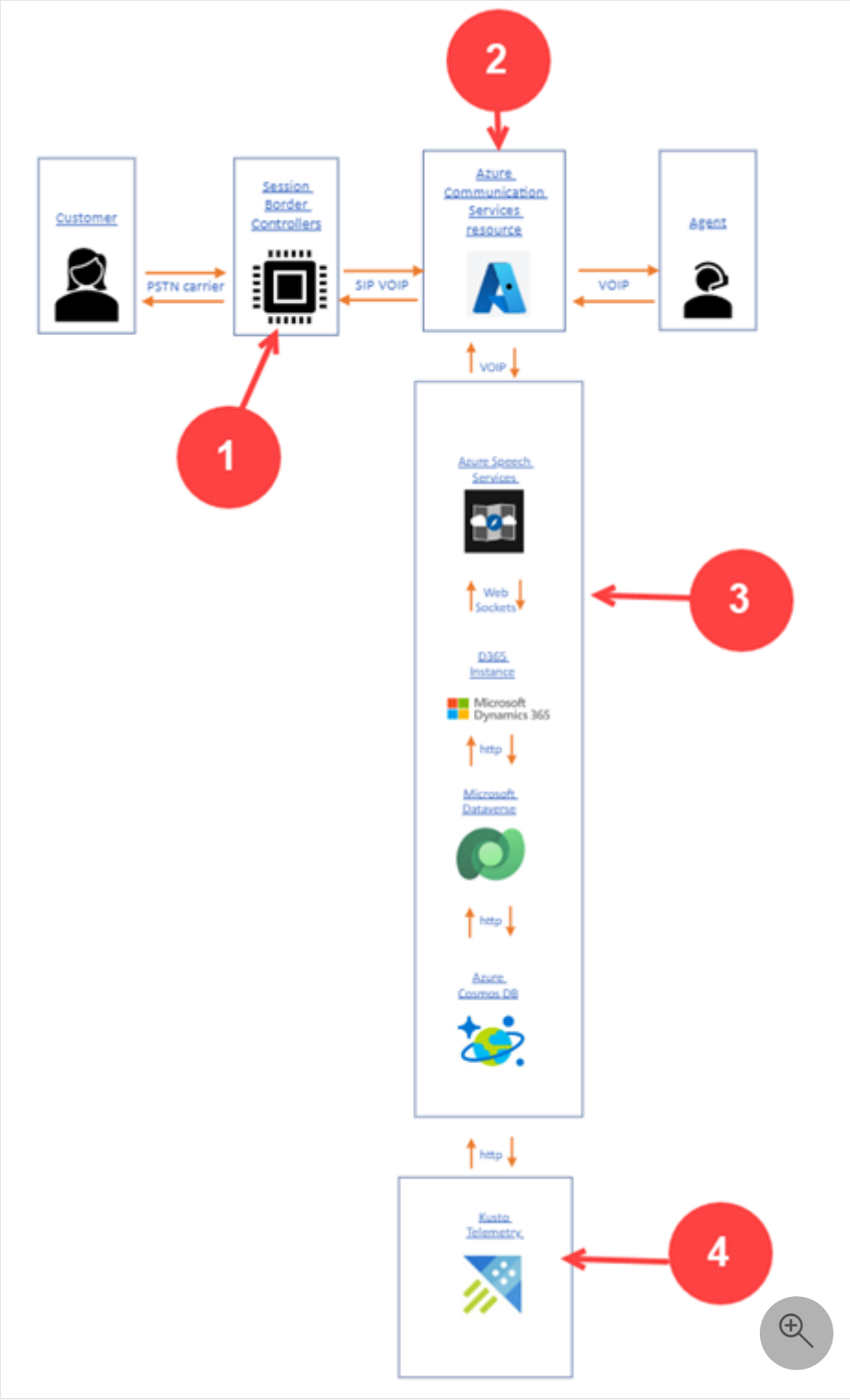


4. Select the conversation for which you want to access the recording and transcript.



Storage location of your recordings and cost

For components within the Microsoft stack, the data doesn't cross geographical boundaries during transit. The bring-your-own-carrier model has dependencies on third parties with components outside the Microsoft stack, and the data needs to be reviewed end-to-end. The components can be in a different geographic location from the Azure Communication Services location as shown in the following illustration.



Legend

Number	Description

Number	Description
1	**Session Border Controller** For Microsoft calling plans where Microsoft is the carrier, Microsoft determines the location to store data. **Direct Routing**: For the bring-your-own-carrier model, the data resides in the region where the Session Border Controller is hosted.
2	**Azure Communication Services**: The data resides in the location where the Azure Communication Services subscription is acquired.
3	**Microsoft Dataverse**: The Microsoft Dataverse server location, Dynamics 365 tenant, Cosmos DB, and Azure Speech Service should all be in the same location chosen during purchase.
4	**Kusto**: Microsoft stores the data for telemetry in Kusto, which is located either in the EMEA or the East US cluster.

The maximum file size of a recording can be 512 MB. The data storage costs with two participants only is calculated approximately as follows and the cost can fluctuate:

- 20-minute call recording = 10240 KB
- 20-minute call transcript = 40 KB

See also

Overview of the voice channel
Agent experience: View call recordings and transcripts
Enable call recording and SMS services
Supported cloud locations, languages, and locale codes
Delete call recordings

Delete call recordings

Article • 06/07/2023

You can delete call recordings that are no longer required. To delete the call recordings, perform the following steps:

1. In the Dynamics 365 instance, go to the app and select the **Advanced Find** icon displayed on the menu.
2. On the **Advanced Find** page, select **Recordings** in the **Look for** dropdown list. More information: Create, edit, or save a view using legacy advanced find
3. Select the required recording.
4. Select the **Delete** icon.

Alternatively, you can delete the recordings from the msdyn_ocrecording entity by using the DELETE request.

You can also delete call recordings in bulk. More information: Bulk deletion

See also

Configure call recording, transcription, and real-time translation

Enable voice consult with Microsoft Teams users

Article • 08/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

Customer service is not always limited to contact centers. Employees within the enterprise are often required to assist agents in customer service scenarios and talk to customers directly for highly technical or VIP engagements. You can enable your agents to consult with or transfer voice calls in Omnichannel for Customer Service to subject matter experts (SMEs) in Microsoft Teams.

The SMEs can participate in customer service conversations directly from Microsoft Teams to help agents in Dynamics 365 and customers on the phone call to resolve issues expertly.

Prerequisites

The following prerequisites must be set for the Microsoft Teams users:

- **Assign phone numbers to SMEs in Microsoft Teams**: Must have a phone number assigned to them in Microsoft Teams to participate in the voice call as an SME consult. More information: Assign, change, or remove a phone number for a user.

To update the Teams phone number in the user profile, perform the following steps:

1. Sign in to the Azure portal and go to **Azure Active Directory**.
2. Select **Manage** > **Users**
3. Select the required user and select **Edit** to add the phone number in the **Contact info** > **Office phone** field.

> **Note**
>
> When you're adding a business phone number, make sure that you prefix the number with the plus sign (+) followed by the country code.

- **Update the Azure profile for SMEs with phone number**: Add SMEs with phone numbers as guest users to the Microsoft Entra ID for them to participate in a voice call as an SME consult. To add a guest user and update a phone number in the user profile, perform the following steps:

  1. Add a guest user in the Azure portal. More information: Add a new guest user
  2. On the guest user profile page, select **Edit** to add the phone number in the **Contact info** > **Office phone** field.

  Dynamics 365 uses Graph API to retrieve the number in the **Office phone** field. Agents can then search for the guest user in the Teams tab of transfer or consult.

Enable agents to consult with Microsoft Teams users

To allow the agents to consult with Microsoft Teams users, enable the **Consult with Microsoft Teams user** setting in the voice channel section of the workstream for voice. More information: Configure the voice channel

See also

Introduction to the voice channel
Agent consult with Microsoft Teams users

Manage phone music

Article • 09/18/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Omnichannel for Customer Service comes with out-of-the-box music files that you can use to set hold tunes and wait tunes. You can replace them with your own music files, or even upload new ones to be used for hold or wait music in your customer calls. The hold or wait music will automatically be played on loop.

You can also configure hold and wait music for each language in each of the workstreams.

The following characteristics are applicable to the music files.

- The files can be up to 20 MB; for best experience, upload MP3 files.
- The files must have the ID3 tags so that they play successfully when the call is put on hold.
- The quality of the audio files that you upload might be reduced because audio file URLs are embedded in Speech Synthesis Markup Language (SSML). The telephony gateway gets Pulse Code Modulation (PCM) 16k audio bytes as part of the speech orchestration. More information: Add recorded audio.
- When audio files pass through public service telephone networks (PSTN), their quality might be reduced to a sample rate of 8 kHz (narrowband). While the voices in these files remain audible, the music quality isn't good. We recommend that you lower the sample rate of the music file to 8 kHz and assess whether the sound quality is good.
- Hold music files are played directly and aren't embedded in SSML.

Edit music files

You can update existing music files and replace them with your own music files in the Customer Service admin center or Omnichannel admin center app.

To update existing music files

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
   b. In the **Phone Music** section, select **Manage**.

   The **Phone music** page is displayed.

2. Select any music file from the list and then select **Edit**.

3. In the **Edit phone music** dialog, you can do the following:

   - **Name**: Edit the name of the music file.
   - **Replace**: Select **Replace** to update the music file with any other music file from your computer.
   - You can play the music file to test it.

4. Select **Save and close**.

Add custom hold and wait music

You can also add new music files to use them in calls as hold and wait music.

To add new music files

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
   b. In the **Phone Music** section, select **Manage**.

   The **Phone music** page is displayed.

2. Select **Add new**.

3. In the **Add new phone music** dialog, enter the following details:

   - **Name**: Enter a name for your music file.

- **Sound file**: Select **Upload** to upload any sound file from your computer with a file size no more than 20 MB. Be sure to choose some music that loops well.

4. Select **Save and close**.

Add hold and wait music to the workstream

1. In Customer Service admin center or Omnichannel admin center, go to the voice workstreams, and then select the workstream to configure the phone music.
2. Select **Edit** next to the pencil icon, and then on the **Voice settings** page, select **Language**.
3. Select the type of hold and wait music you want the customer to hear. For example, for the primary language, you might always want to use a certain type of hold music, but for a secondary language, you might choose a different type of music.
4. When you've finished configuring the settings, select **Confirm**.

See also

Overview of the voice channel

Set up a multilingual bot in Power Virtual Agents

Article • 05/22/2023

You can configure routing rules to route voice calls to appropriate agents based on the language that your customer has selected. A multilingual contact center helps you serve global customers who want to interact with your contact center in the language of their choice. You can also set up bots as the first contact who can handle such requests.

Use Bot Framework Composer in Power Virtual Agents to set up a bot for a multilingual contact center.

The process for setting up the multilingual bot in Power Virtual Agents is as follows:

1. Create a bot in Power Virtual Agents.
2. Create a topic in Bot Framework Composer.
3. Configure the greeting topic in Power Virtual Agents.
4. Configure the transfer to agent node by using the escalate topic.
5. Configure workstreams and queues.
6. Verify the multilingual bot.

Prerequisites

- You must install Bot Framework Composer locally on the computer that you'll use to configure the multilingual bot.
- Your bot must be registered in the Azure app registration page. Note the application ID. More information: Create an app registration

Create a bot in Power Virtual Agents

You'll create a bot in Power Virtual Agents by selecting the environment in which Omnichannel for Customer Service is configured. For detailed instructions, go to Create a bot.

For example, you can create a bot with the following details:

- **Name**: A descriptive name for the bot, such as **Greeter bot**.

- **Language**: The primary language for the bot, such as **English (US)**.
- **Environment**: The environment where Omnichannel for Customer Service is configured, such as **contoso-printers**.

Create a topic in Bot Framework Composer

1. In Power Virtual Agents, for the bot that you created, select **Topics** in the site map, and then in the **Topics** pane, select the dropdown arrow for **New topic**. A message appears stating that the application is trying to open Bot Framework Composer. For more information on how to navigate the Bot Framework Composer, see: Tutorial: Create a weather bot with composer.

2. Select **Open**, and on the **Import your bot to new project** dialog that appears, enter the following details:

   - **Name**: A name for the project, such as **Multilingual bot**.
   - **Location**: Select a folder on the computer.

3. In Bot Framework Composer, select **More commands** (...), select **Add a dialog**, and enter the following details:

   - **Name**: A name such as **PVA greeter dialog**.
   - **Description**: A brief description.

4. In the site map, select **BeginDialog**, select the **Add** (+) node, and then select **Send a response**.

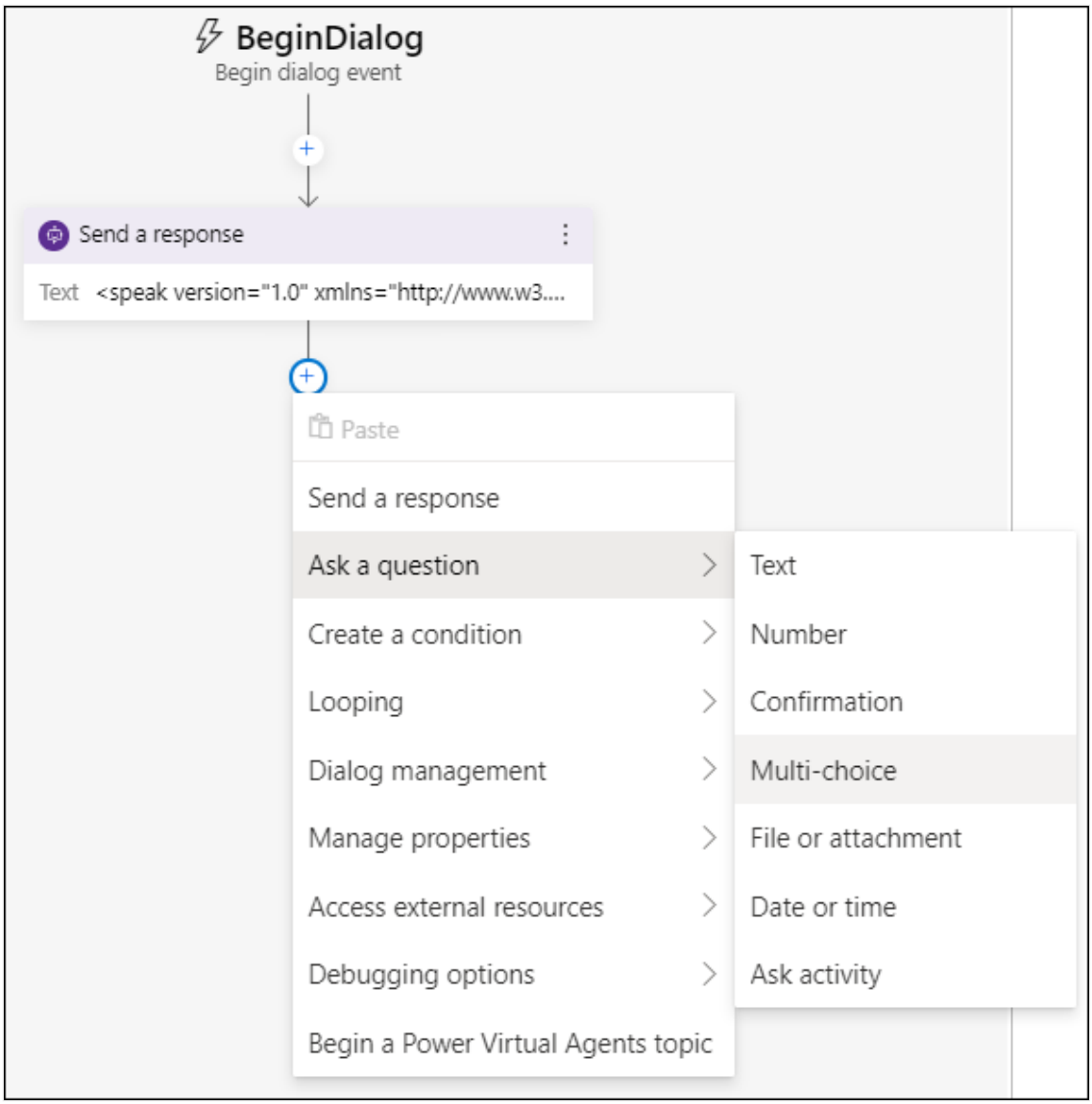
   a. In the **Bot responses** section, select the **Add** (+) node, and then select **Speech**.

   b. Select **Add alternative**, and then add the following text.

   ```
   <speak version="1.0" xmlns="http://www.w3.org/2001/10/synthesis" xml:lang="en-US"><voice name="en-US-AriaNeural"><lang xml:lang="en-US">Hello ${virtualagent.msdyn_CustomerName}. Welcome to contoso customer support.</lang></voice></speak>
   ```

   > **Note**
   >
   > The ${virtualagent.msdyn_CustomerName} variable will provide the customer name for authenticated customers only through record identification. More information: **Identify customers automatically**

c. Select the **Add** (+) node in **BeginDialog**, point to **Ask a question**, and then select **Multi-choice**.



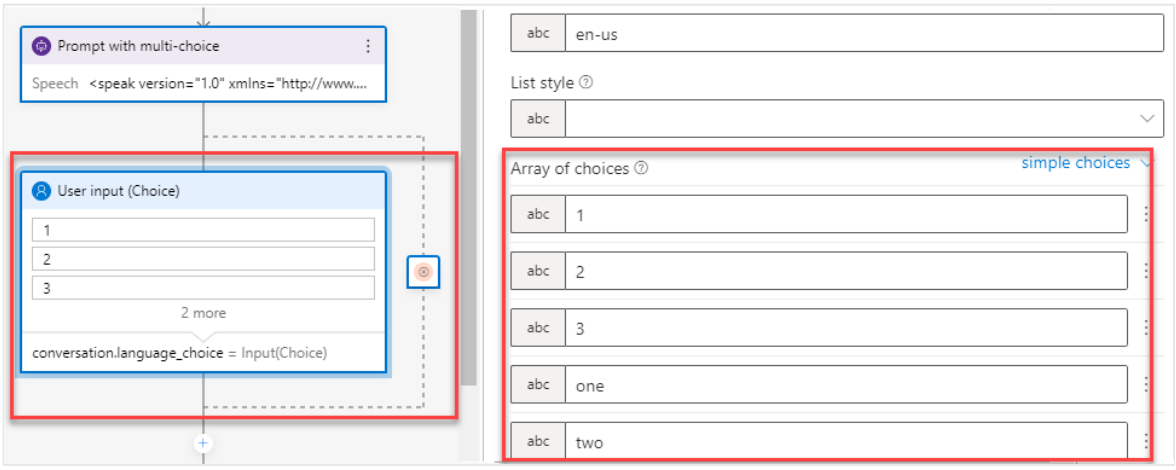
d. Repeat steps a and b to add the following text.

```
<speak version="1.0" xmlns="http://www.w3.org/2001/10/synthesis" xml:lang="en-US"><voice name="en-US-AriaNeural"><lang xml:lang="en-US">Press or say 1 for English.</lang><break strength="medium"/><lang xml:lang="fr-FR"> Appuyez ou dites 2 pour le français.</lang><break strength="medium"/><lang xml:lang="pt-PT">Pressione 3 para português.</lang></voice></speak>
```

e. Select the **User input** box, and enter the following details on the rightmost pane:

- **Property**: conversation.language_choice
- **Array of choices**: 1, 2, 3, one, two, three, un, deux, trois, um, dois, três

In **Array of choices**, specify one choice per expression.



f. Select the **Add** (+) node, select **Create a condition**, and then select **Branch Switch (multiple options)**. Enter the following details:

- **Condition**: conversation.language_choice
- **Value**: 1, 2, 3, One, Two, Three, Un, deux, trois, Um, dois, três

  Enter one choice per value.

g. Select the **Add** (+) node and then select **Manage properties** > **Set a property** and enter the following details:

- **Condition**: virtualagent.va_CustomerLocale
- **Value**: en-US

Repeat the steps to **Set a property** for fr-FR, pt-PT, hi-IN.

The value for the virtualagent.va_CustomerLocale variable will be updated with the language selected by the customer.

> ⓘ **Note**
>
> You must set the va_CustomerLocale context variable with the locale codes for the languages that you want to support. More information: **Supported locations and locale codes**

h. Select the **Add** (+) node, and then select **Begin a Power Virtual Agent topic**.

i. In **Dialog name**, select **Escalate**.

5. In the site map, select **Publish**, and then select **Publishing profile**.

   a. Select **Edit**, and then select **Login to proceed**.

   b. Select the environment and bot, and then select **Save**.

   c. Select the **Publish** bot, select the bot, and then select **Publish selected bots**.

   d. Select **Okay** .

6. In Power Virtual Agents, refresh **Topics**. You'll see the topic listed.

7. Select **Publish**.

Configure the greeting topic in Power Virtual Agents

1. In Power Virtual Agents, open the **Greeting** topic in the authoring canvas, and delete all the default messages except the trigger phrases.

2. Select **Add node** (+), and then select **Redirect to another topic**.

3. Select the greeter dialog that you created, which is, **PVA greeter dialog** in our example.

4. Save the **Greeting** topic.

Configure the transfer to agent node by using the escalate topic

1. In Power Virtual Agents, open the **Escalate** topic in the authoring canvas, and delete all the default messages except the trigger phrases.

2. Select **Add node** (+), select **End the conversation**, and then select **Transfer to agent**.

3. Optionally, in **Private message to agent**, enter the following to fetch the preferred language of the customer.

   `Customer preferred language is {x} bot.va_CustomerLocale`

4. Save the topic.

5. In the site map under **Manage**, select **Channels**, and then select **Microsoft Teams** on the **Channels** page.
6. Publish the bot with the latest content.
7. In the site map under **Manage**, select **Agent transfers**, and then select **Omnichannel** on the **Agent transfers** page.
8. On the Omnichannel pane, configure the following settings:
    - **Enable voice**: Set to **Yes**.
    - **See the environment this bot is connected to**: Select the environment in which the bot will be used.
    - **Application ID**: Enter the application ID that was generated when you registered the app in Azure.
9. Select **Add your bot**.
10. After the bot is connected, select **View details in Omnichannel**. The Omnichannel admin center page opens on a new tab and displays the details of the bot.
11. Note the bot user information that you'll need for further configuration steps.

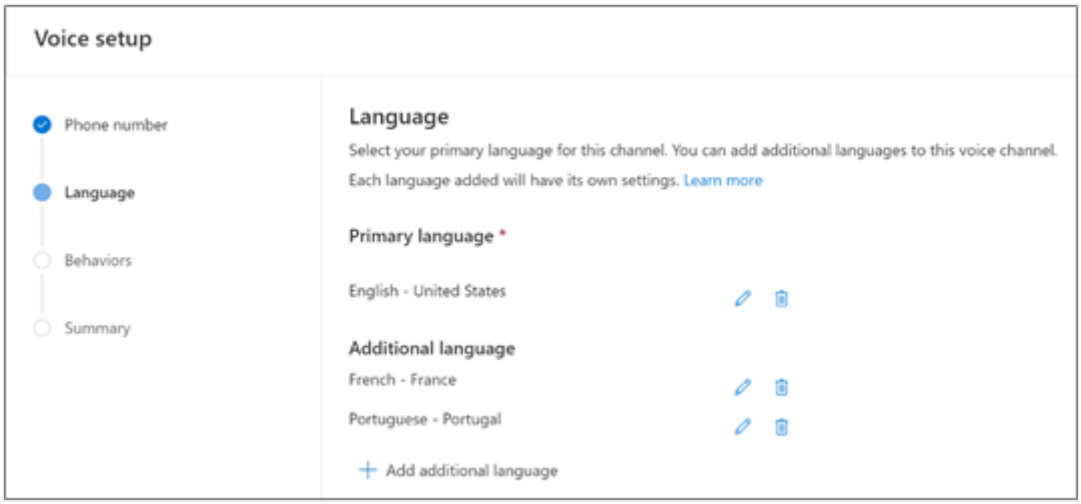
Configure workstreams and queues

Use the information in the following articles to configure a voice workstream and a voice queue, and their routing rules.

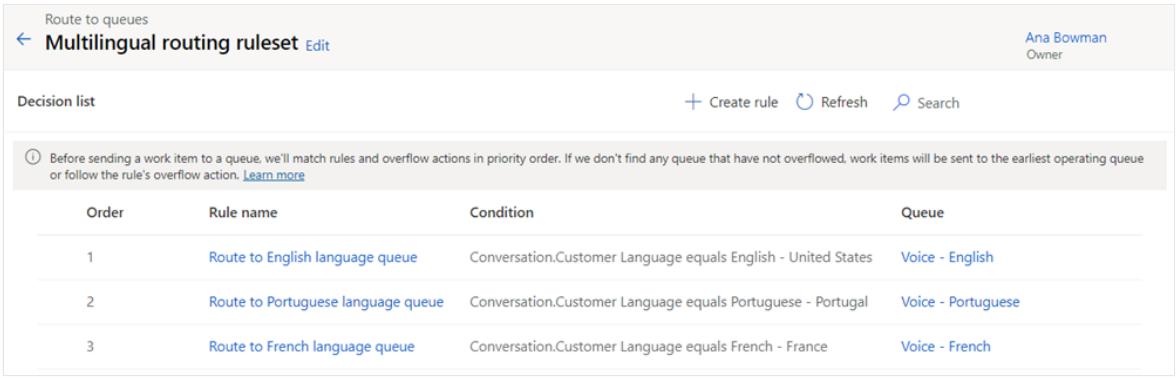
- Configure a workstream
- Configure work classification
- Configure a queue
- Configure assignment methods

For example, ensure the following settings:

1. Configure three voice queues—one each for English, French, and Portuguese—and add the required agents.
2. Configure a voice workstream with English as the primary language, and French and Portuguese as additional languages.



3. In the route to queues rule set of the workstream, use **Conversation.CustomerLanguage** as the criteria to route the incoming call to different language queues based on the option that's selected by the customer.



4. In the **Bot** area of the workstream, edit to add the Power Virtual Agents bot that you configured.

Verify the multilingual bot

1. As a customer, call the number that's registered with the voice workstream.

2. When you're prompted with an interactive voice response (IVR) message, select a language. Verify that the bot routes the call to an agent who can speak with you in the language that you've selected.

See also

Set up a multilingual contact center
Integrate a Power Virtual Agents bot

Set up a multilingual contact center

Article • 11/22/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Agents are increasingly serving global and diverse customers who speak multiple languages, so it's important that the communication tools they use be able to work across languages.

You can configure a phone number in a workstream that allows the customer to choose the language in which they speak, as well as choose the language of the bot.

Prerequisites

- Set up a phone number. More information: Manage phone numbers
- Create the queues you need for your business, based on the customer's language. For the **Type**, select **Voice**. More information: Create and manage queues
- Create a workstream. For the **Type**, select **Voice**. More information: Create and manage workstreams

Add a phone number to the workstream and configure language settings

1. In Customer Service admin center or Omnichannel admin center, go to the voice workstreams, and then select the workstream to configure the phone number.
2. Select **Edit** next to the pencil icon, and then on the **Voice settings** page, select the number to add to the workstream, and then select **Next**.
3. On the **Language** tab, select **Add primary language**. A language page is displayed, where you set the primary language for the channel. You can add additional languages to this voice channel, and each language added will have its own settings. The **Primary language** is the first language the bot uses to greet the customer. This allows your organization to have one phone number that services

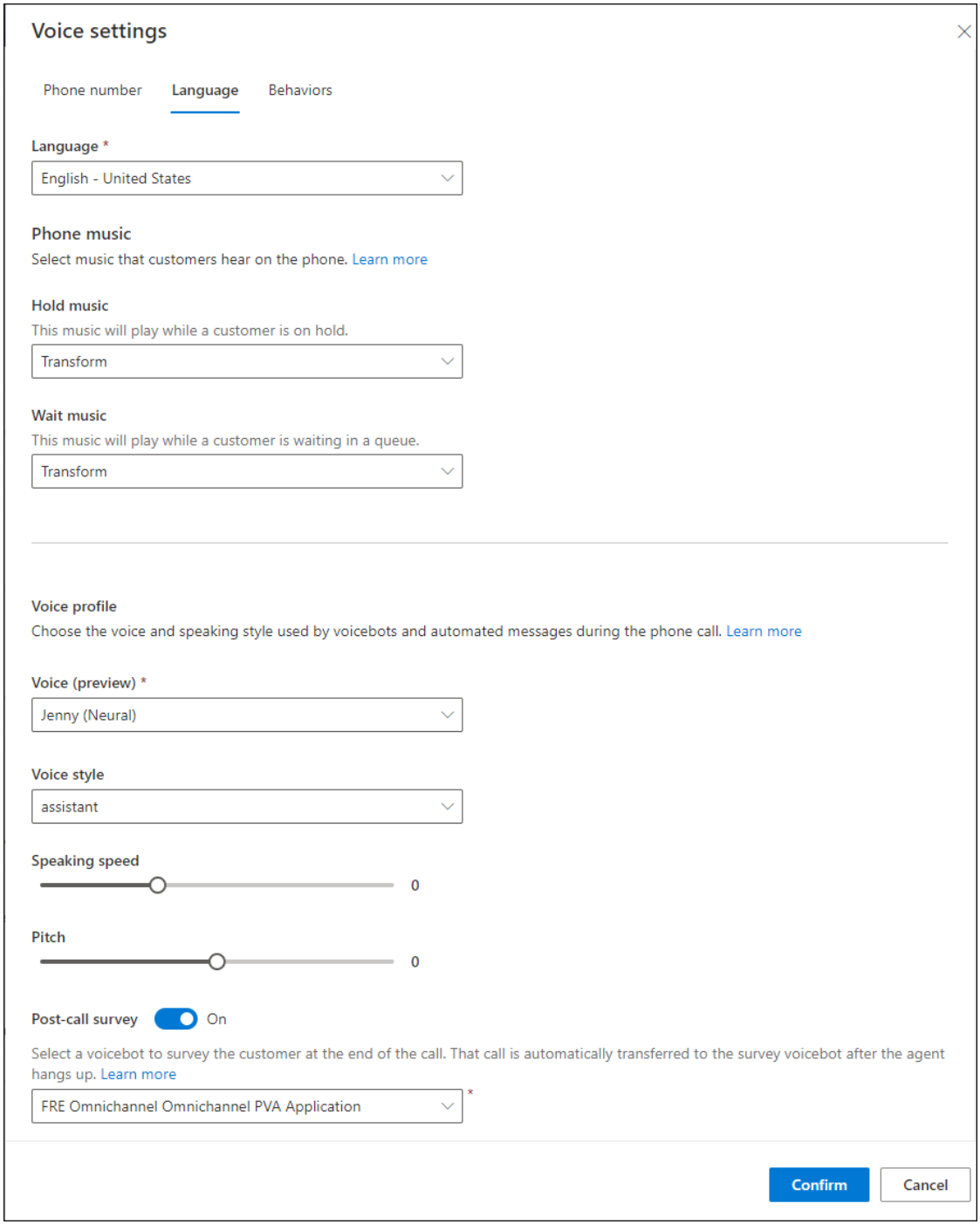
multiple languages, rather than have multiple phone numbers, each with one language, and then ask customers to call the right number.

4. Select the type of hold and wait music you want the customer to hear.

5. In **Voice profile**, select a voice, voice style, speaking speed, and pitch for the bot.

6. Turn on the **Post-call survey** toggle if you want the bot to present a survey to the customer at the end of the call. If this feature is turned on, the call will automatically get transferred to the survey bot after the agent hangs up.

7. When you've finished configuring the settings, select **Confirm**.



Create language-specific routing rules

Define the language-based routing rules. More information: Configure work classification rulesets for unified routing

Considerations

Here are a few things to consider when you configure your bots for multilingual contact center.

- The language of the bot must be the same as that of the voice workstream to which the bot will be attached.
- You can configure different geographic locales for the bot and voice workstream. For example, you can set English-UK in the voice profile and English-US in the bot.
- The bot's accuracy depends on the similarities between locales. However, if you configure different locales, the preconfigured entities for the bot, such as zipcode, might not be accurate.

See also

Introduction to the voice channel
Azure cognitive services - speech to text
Set up a multilingual bot in Power Virtual Agents

Bring your own carrier

Article • 09/28/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Azure Communication Services direct routing enables you to connect your existing telephony infrastructure with Azure so that you can retain your existing carrier and phone numbers, and streamline inter-office call transfers.

Prerequisites

- Connect to an Azure Communication Services resource to bring in your carrier via direct routing. You must then set up direct routing for the connected Azure resource.
- Be familiar with the following concepts:
  - Azure Communication Services
  - Azure Communication Services direct routing
- Ensure that the following settings are in place to enable your carrier to work with Azure Communication Services.
  - Check your direct routing infrastructure requirements.
  - Get a certified Session Border Controller (SBC).
  - Connect the SBC to Azure Communication Services.
  - Ensure that the SBC responds with a Session Initiation Protocol (SIP) status code in the 100s to the invite request from direct routing. SIP status codes beginning with 4, 5, or 6 indicate failures.
  - Ensure that the phone number of your Dynamics 365 organization is encoded in E.164 format so that the calls can be forwarded by your SBC.
  - Deploy the SBC and DNS server in the same region. Azure Communication Services hosts group calls in the region where the DNS server is deployed. If the SBC and DNS server are in different regions, users can experience a delay. Ensure that your DNS server is not delegated to a sub domain.

Bring your own phone number via direct routing

1. In Dynamics 365, go to one of the admin apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

   b. Select **Manage** for **Phone numbers**.

2. Select **Advanced** on the menu.

3. Select **Add Number** for **Bring your own number via Azure Direct Routing**.

4. In the **Add your own phone number** dialog, enter the following details.

   - **Phone number**: Indicates the phone number that you own and have configured in your SBC.
   - **Carrier**: Indicates the carrier to which the phone number belongs. If the carrier doesn't exist yet, you can create a new record.
   - **Country/Region**: Select the country or region the phone number belongs to.
   - **Number type**: Select whether toll-free or a local phone number.
   - **Calling plans**: Select whether you can make or receive calls on the phone number.

     > ⓘ **Note**
     >
     > SMS is not supported with direct routing.

5. Select **Add number**.

The new phone number will be displayed in the **Phone numbers** list and is ready for setup. You can now connect it to a voice workstream, configure outbound calling, or even assign it to an agent.

SBC best practices

- For Microsoft Teams and Azure Communication Services direct routing, you might use the same port number, but you must use a different fully qualified domain

name (FQDN).

- To avoid call timeout, ensure that the following settings for Secure Real-time Transport Protocol (SRTP) are configured:
  - Reset SRTP Upon Re-key = Disable
  - Generate SRTP Keys = Only if Required
- Ensure that you have sufficient transcoding licenses if your service provider and Azure Communication Services don't support the same codec.

See also

Overview of the voice channel
Manage phone numbers
Set up outbound calling
Set up inbound calling
Connect to Azure Communication Services
Integrate a third-party IVR system with voice channel
Supported cloud locations, languages, and locale codes

Introduction to Nuance Cloud IVR bot integration

Article • 10/27/2023

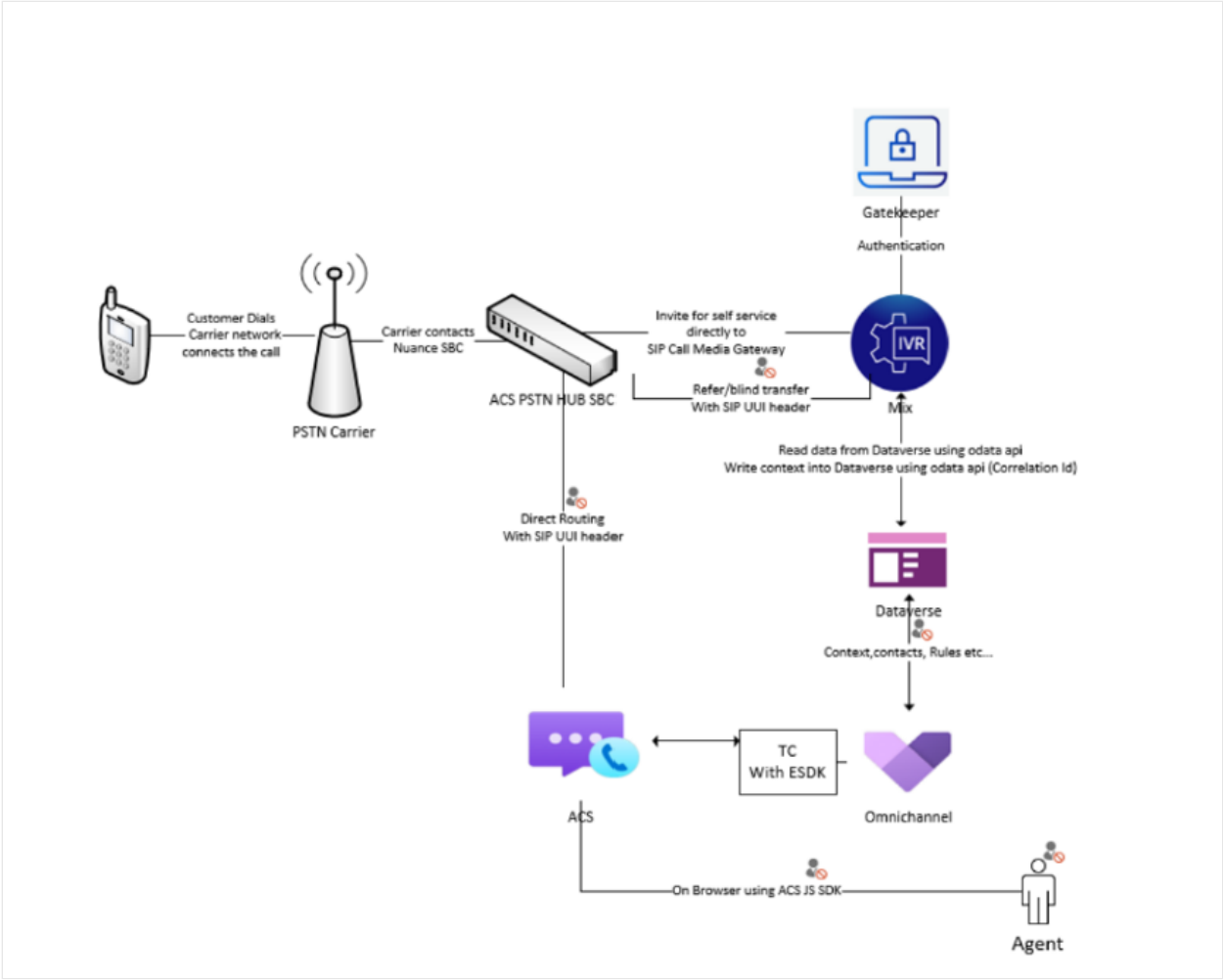
Nuance Cloud IVR bot is part of the Digital Contact Center Platform—an open, extensible, and collaborative platform for seamless omnichannel customer engagement.

The bot can be integrated with the voice channel in Omnichannel for Customer Service to enable contextual call transfers. Customers can interact with the Nuance Cloud IVR bot first and then an Omnichannel agent if the call is escalated.

How the integration works

The integration for Nuance Cloud IVR uses Azure Communication Services to route incoming calls to the Nuance Cloud IVR bot and then from the bot to the voice channel. The customer call comes in through Direct Routing or Public Switched Telephone Network (PSTN) and is routed through Nuance's Session Border Controller (SBC).

The call is then escalated to an agent through Azure Communication Services using the Session Initiation Protocol. The SIP header data is used to route the call and display details to the agent such as the IVR transcript and call intent, which are captured during the IVR session.



Next steps

Set up Nuance Cloud IVR bot integration with voice channel

Integrate Nuance Cloud IVR bot with voice channel in Customer Service

Article • 09/01/2023

Integrate the Nuance Cloud IVR bot with the voice channel using Azure Communication Services.

Prerequisites

- You must obtain an active subscription of **Dynamics 365 Customer Service Voice Channel Add-in** or **Dynamics 365 Customer Service Digital Messaging and Voice Add-in**. For more information about licenses and pricing, see the Dynamics 365 licensing guide. You can also purchase add-ins on the Microsoft 365 admin center. More information: Buy add-ons.
- Nuance Professional Services must perform the steps in Verify the domain ownership to confirm that the domain name is valid before connecting a Session Border Controller to Azure Communication Services. The Azure portal generates a value for the TXT record. Authorize the domain for the validation to succeed.

If you haven't added a domain, follow the steps in Add a new domain name. Enter staging.ivr.nuance.com or nuance.com as the domain.

Connect Azure Communication Services to voice channel

Azure Communication Services allows you to obtain phone numbers for customers to reach your business. Follow the steps in Azure resource to provision phone numbers to provision a new phone number. You can also import phone numbers or connect your existing telephony infrastructure with Azure. If you already have voice channel configured, you can skip this step.

Connect Azure Communication Services to Nuance Cloud IVR bot

Use the information in this section to set up the Nuance Cloud IVR bot as the deflection bot. Typically, Nuance Professional Services performs these steps.

Create Azure Communication Services resource

Create an Azure Communication Services resource. See: Quickstart: Create and manage Communication Services resources.

Obtain a phone number

Provision a phone number. See: Get and manage phone numbers

Enable Direct Routing

Direct Routing lets you to connect to the existing Nuance telephony infrastructure. Perform the steps in the section below to connect a supported Nuance Session Border Controller (SBC) to Azure Communication Services to enable Direct Routing.

Configure a Session Border Controller

1. Specify the **Fully Qualified Domain Name** of the SBC to be configured in Direct Routing. Follow the steps in Adding a Session Border controller to ensure that messages are exchanged between Azure Communication Services and the configured SBC.
2. Configure outbound voice routing rules for Azure Communication Services direct routing. Follow the steps in Creating Voice Routing rules to set up the voice routing rules.
3. Create an Azure Function to redirect the call from Azure Communication Services to the SBC with the following environment variables:

    - `redirectNumber`: Number that you want your incoming calls to be redirected to.
    - `dialedNumberConnectionString`: Azure Communication Services connection string for the dialed number.
    - `dialedNumber`: outbound number that your incoming calls are routed to.

4. Navigate to your Azure Communication Services number and integrate the Event Grid event type, `Microsoft.Communication.IncomingCall`, with your Azure function. You can perform one of the following actions:

    - Through the Azure portal:
        - Select **Event** and then select **Create Event Subscription**.
        - Specify the following information on the Create Event Subscription page:
            - Name

    - Event Schema: Event Grid Schema
    - Filter to Event Types: **Incoming Call (Preview)**
    - Endpoint Type: Azure Function and then specify the function you've created.

- Run the following armclient command at the prompt:

```
armclient put
"/subscriptions/[your_azure_subscription_guid]/resourceGroups/[your_resou
rce_group_name]/providers/Microsoft.Communication
/CommunicationServices/[your_acs_resource_name]/providers/Microsoft.Event
Grid/eventSubscriptions/[subscription_name]?api-version=2022-06-15" "
{'properties': {'destination': {'endpointType':
'AzureFunction','properties': {'maxEventsPerBatch':
'1','preferredBatchSizeInKilobytes': '64','resourceId': ' /subscriptions/
[your_azure_function_subscription_guid] /resourceGroups/[Your Azure
Function RG Name]/providers/Microsoft.Web/sites/[Your AzureFunction name
in Portal]/functions/[Your AzureFunction Name in your C#
code]'}},'filter': {'includedEventTypes': ['Microsoft.Communication.
IncomingCall']}}}" -verbose
```

Deploy the bot

Configure the session.xml with dynamic parameters such as **dataverse_organization_url**, **dataverse_tenant_id**, **dataverse_client_id**, **dataverse_client_secret_name**, and **dataverse_azure_key_vault_url** in Nuance IVR tools. The Nuance Cloud IVR bot is then deployed.

Set up voice channel to receive escalated calls from Nuance Cloud IVR bot

When the bot escalates a call, a record is created in the **msdyn_ocexternalcontext** table. The SIP UUI header includes the msdyn_ocexternalcontext recordID. This recordID is transferred to the Azure resource that's connected with Omnichannel for Customer Service.

The voice channel in Customer Service receives the call and the system creates a new msdyn_ocliveworkitem record. The system links the msdyn_ocexternalcontext and msdyn_ocliveworkitem tables if it finds the msdyn_ocexternalcontext recordID in the SIP UUI header.

The Omnichannel administrator must perform the actions in the following sections to route the call to the appropriate agent and display the bot conversation transcript on the **Active Conversation** form.

Set up routing rules and configure rulesets

Create a new work classification rule to classify the incoming call, match the call intent to the agents' skills, and route it to the appropriate queue and agent.

1. In Customer Service admin center, select a workstream, and follow the steps to Configure work classification rulesets
2. In the **Conditions** area, select **Add related entity** and then select **External Context** from the **Many to One group**, and then select **Contains Data**. Specify the call intent.
3. Configure a new rule set for Route to Queues, creating a queue for that skill. More information: Configure route-to-queue rules.

Customize Active Conversation form to view transcripts

Customize the conversation form for agents to view the transcripts from Nuance Cloud IVR bot on the Active Conversation form in Customer Service workspace.

1. In Power Apps, select the environment that contains your solution
2. Select **Tables**, select the **Conversation** table, and then select the **Forms** area.
3. Select the required form.
4. On the left navigation pane, select **Components**.
5. Select **CC_Transcript_Control** in the list of available components. This component is available out-of-the-box.
6. Specify the required **TableName** and **TableColumn** in **CC_IsExternalContext**.
7. Save and publish the form. The form on the application UI displays the transcript from the IVR.

You can use a web resource to disable the transcript from being displayed if a transcript of the bot conversation isn't available. More information: Create a JavaScript web resource.

Use the following sample code to disable the transcript from being displayed:

```
    export class FormWebResource {
    public static async onFormLoad(context: XrmClientApi.EventContext):
Promise<void> {
```

```
    var formContext = context.getFormContext();
    formContext.tabs.get("<Your form tab name>").sections.get("<Your section
name>").setVisible(false);
   }
  }
```

Define field requirements for call intent

Nuance Professional Services can extend the **msdyn_ocexternalcontext** to include additional customer metadata that is added to the context of the Nuance IVR application. They must modify the payload file to include the newly added fields.

See Create and edit columns in Dataverse to extend the table.

View IVR transcripts

When an agent accepts a call that's been transferred from the Nuance Cloud IVR bot, the Customer Summary page displays the complete information about the customer, along with the conversation transcript of the steps taken by the IVR to resolve the customer issue.

The app displays an error message if there's no data or partial customer data.

Integrate a third-party IVR system with voice channel

Article • 09/28/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Azure direct routing lets you integrate a third-party interactive voice response (IVR) system with Omnichannel for Customer Service voice channel, and perform a contextual call transfer between them.

Prerequisites

Before you proceed with this section, you must be familiar with the following concepts.

- Azure direct routing
- Azure direct routing infrastructure requirements
- Session Border Controllers and voice routing

Set up contextual call transfer using Azure direct routing

This section lists the high-level steps you must perform to enable contextual call transfer between a third-party IVR system and the voice channel.

1. Set up Azure direct routing and connect a Session Border Controller (SBC), which is linked to the third-party IVR system, with Azure Communication Services resource, which is in turn connected to Omnichannel for Customer Service.

2. Follow the steps in the section Bring your own phone number to register the phone number that's assigned to the third-party IVR system with Omnichannel for Customer Service.

3. To transfer a call from the IVR system, issue an SIP (Session Initiation Protocol) INVITE request to the Azure Communication Services resource that'll transfer the call to the Azure resource that's connected to Omnichannel for Customer Service.

4. To include context in the payload, populate the SIP UUI (User-to-User Information) header with context data: "User-to-User": "param1=value1;param2=value2". For SIP UUI header with context data, the following formats are supported:

- Plain text or string. Seperate the key value pairs by a semicolon. For example, *"sipkey1=sipval1;sipkey2=sipval2"*
- Hex encoding format. Specify the encoding key word. For example, *"7369706B6579313D73697076616C313B7369706B6579323D73697076616C32;encoding=hex"*

5. Create context variables with the same names as the SIP UUI header.
   a. In Customer Service admin center, go to **Customer support** > **Workstreams**. If you're using Omnichannel admin center, go to **General settings** > **Workstreams**. A list of workstreams including voice workstreams is displayed.
   b. Select a voice workstream and then select **Edit** to configure the workstream.
   c. In the **Advanced settings** area, select **Add context variable**.
   d. In the **Edit** dialog that opens, select **Add**, and then select **Add context variable**.
   e. Enter the values for **Name** and **Type**. Ensure that the names of the context variables match exactly with the param names in the SIP UUI header.
   f. Select **Create**.

   The SIP UUI payload is automatically converted into context data that can be used in the voice channel for routing and to show relevant information to the agent.

You can now call the phone number assigned to the third-party IVR system and achieve a contextual call transfer with the voice channel.

> ⓘ **Note**
>
> Call record and transcriptions from the third-party IVR call with the customer aren't available for agents.

See also

Overview of the voice channel
Manage phone numbers
Set up outbound calling
Connect to Azure Communication Services
Bring your own carrier

Call a customer

Article • 09/22/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

To be able to call customers, your administrator must configure outbound calling, add you as user to the outbound capacity profile, and then set up outbound profiles. More information: Outbound calling

1. In Customer Service workspace or Omnichannel for Customer Service, go to **Contacts**, and then select a customer to call.
2. On the **Active Conversation** page, locate the **Mobile Phone** field, and then select the call icon to call the customer. You can also select the **Launch dialer** phone icon on the menu bar to quickly call a customer. The **Dial number** panel appears. You can perform the following actions:

    - On the dial pad, you can copy, type in a number, or select a number from the recently dialled numbers. The country code dropdown displays the list of supported countries and regions that you can call. You can also view and call from the most recently dialed called numbers. By default, the last 20 calls that you've received or made are displayed.
    - In the profile dropdown, the outbound profile and the phone number that you're using to make the call is displayed. This is the outbound calling number that is displayed on the customer's phone when they receive your call.
    - You can call those phone numbers only whose regions are configured in the outbound profiles.
    - The dropdown displays the list of supported countries and regions from all the outbound profiles assigned to you.
    - When you enter the number you'd like to call, the application identifies the outbound profile that has the dialed number's country or region configured.
    - By default, the number pad is hidden. To display the number pad, select the number pad icon.

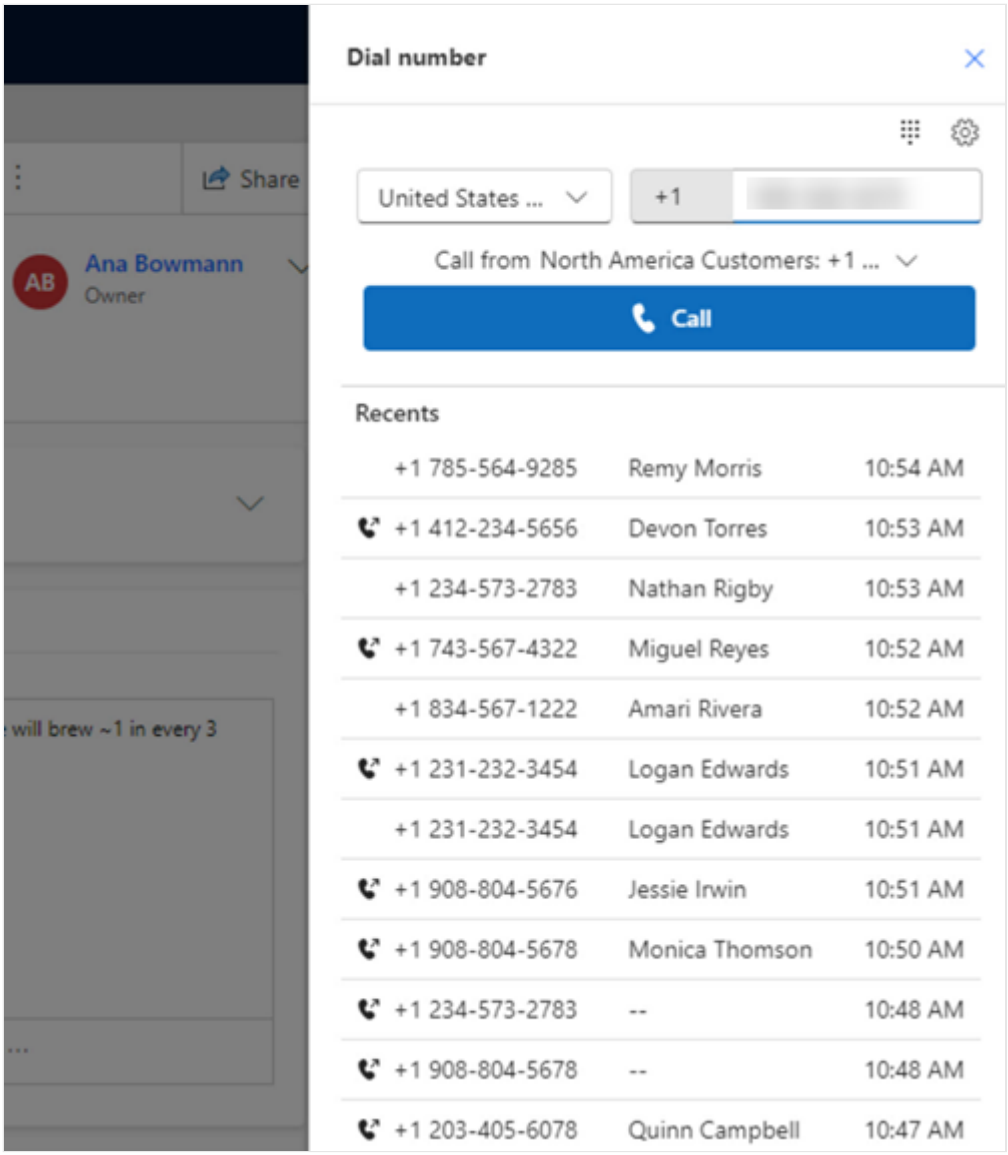
    > ⓘ **Note**

- The enhanced outbound dialer is an early access feature. You can opt in early to enable these features in your environment, which will allow you to test these features and then adopt them across your environments. For information about how to enable these features, see **Opt in to early access updates**.
- Your administrator must also enable the **Enhanced outbound dialer experience** setting definition in Power Apps.

If your administrator hasn't enabled the early access feature, when you call a customer, on the number pad that appears, enter the customer's country code, phone number, and then select **Call** to make your call. You don't have to add the plus sign (+) to the number.

3. Select **Call**.

> **Note**
>
> If you aren't assigned an outbound profile, you won't be able to make a call.



When the call connects, you see the customer details on the conversation page. Based on your outbound calling profile, the transcription and recording starts. If your capacity profile has a limit of one outbound call at a time, you can't make another call when a call is in progress.

> **Note**
>
> If you need more trial minutes or phone numbers, we recommend that you file a request with Microsoft Support.

Next steps

Use agent dashboard and call controls in the voice channel

See also

Overview of the voice channel
Use trial phone numbers in the voice channel

Use agent dashboard and call controls in the voice channel

Article • 09/04/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The voice channel in Omnichannel for Customer Service is integrated directly with Dynamics 365 by way of the agent dashboard. The dashboard offers you a consolidated view of the calling interface, the customer summary, case history, and timeline. The dashboard helps you provide quick, effective, and proactive solutions to customer issues. The agent experience in the voice channel is similar to the chat and other channels, which reduces agent training time and costs.

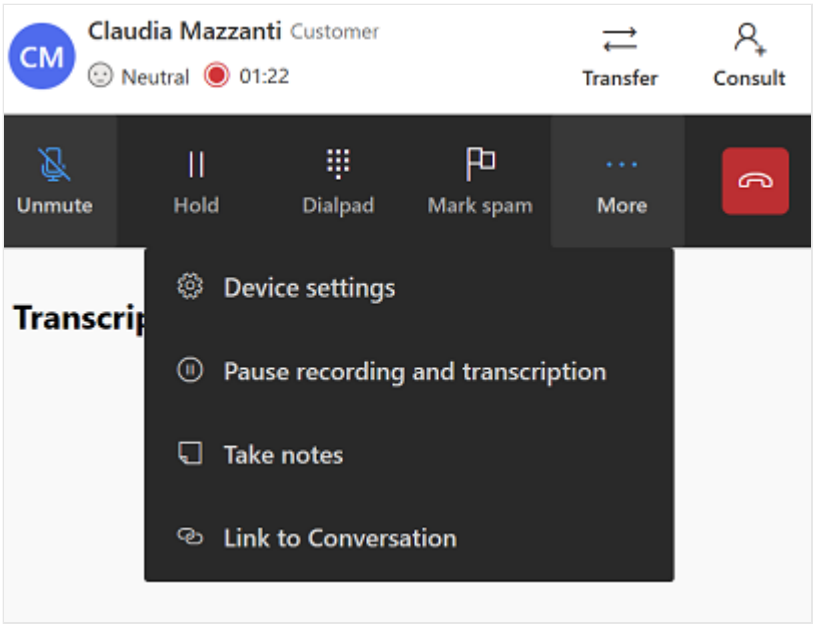
Make and receive customer calls

You can call a customer by using the phone dialer on the **Active Conversation** page or the **Launch dialer** button on the menu. More information: Call a customer

When a customer calls your business, an intelligent bot receives the incoming call. The bot gathers basic information about the customer issue and then transfers the call to you for further action. You'll receive a notification about the incoming call on your agent desktop so you can accept it. The following section describes the call controls and other features you can use during your conversation.

Call controls

The conversation panel in the agent dashboard includes the following call controls that you can use when you call or answer phone calls from customers.



- **Mute**: Mute your microphone so your voice isn't audible to the customer.
- **Hold**: Put the customer on hold; the customer will hear the hold music. You can keep only one caller on hold at a time.
- **Consult**: Select this option to consult with a participant. You can consult with or bring another agent or supervisor into the call. You can have a *public* consultation, where the customer is actively involved in the conversation. Or you can have a *private* consultation, where you can put the customer on hold before you talk to your peers or supervisor.

  > ⓘ Note
  >
  > When you initiate a consult, you are the primary agent and the new participant has a consult role. Select **Transfer** next to the participant to transfer the call to the consulting agent or supervisor. Once the call is transferred, you are the consulting agent and can leave the call without ending the call. The consulting agent becomes the primary agent. If the primary agent leaves the call, the call will end for the customer.

- **Transfer**: Select this option is to transfer the call to an agent, queue, a Teams user, or an external phone number. After you transfer the call, the agent to whom the call is transferred is the primary agent and you'll no longer be on the call. During a transfer to the queue, the customer is automatically put on hold. When you transfer a call to another agent, your number is displayed on the caller ID. The transcription and recording of transferred calls will continue if the administrator has enabled the option. You can disable recording from the dashboard. See: Transfer and consult scenarios

- **End**: End the call.
- **Dialpad**: Select this option to dial an extension number. If you must use the dial pad to send a response while navigating an IVR, select the dial pad icon next to the external participant in the participant list.
- **Mark spam**: Report the incoming call as spam. If you happened to accidentally mark a number as spam, you can select the **Unmark as spam** option.
- **Device settings**: Configure your microphone and speaker settings.
- **Take notes**: Make note of important information or specific details from your conversation with the customer. It's in addition to the call recording and transcription that happen during the conversation.
- **Pause recording and transcription**: If you don't want to capture some details of the conversation—such as bank details, billing, or payment information—you can temporarily pause the transcription and resume it later.
- **Knowledge Articles**: Get a list of knowledge base articles pertaining to the conversation that you can use to resolve the customer issue.
- **Link to conversation**: You can link another conversation, case, customer, or knowledge article to the conversation.

  > ⓘ Note
  >
  > The **Link to conversation** button is disabled after you end the voice call. Open account or contact on a new tab and select **Link to conversation** to link record (customer or case) to conversation.

- **Transcription**: When the transcription and recording service is enabled by your administrator, the conversation between you and the customer is automatically transcribed in real time, which means that you as an agent don't need to take notes during the call. This feature also helps your supervisor or agent (in a call transfer) to see the call history.
- **Sentiment analysis**: The transcript also powers *live* sentiment analysis. This means that you or your supervisor can instantly view and gauge the customer's mood and feeling via the sentiment icons.

Report a phone number as spam

You can report a phone number as a spam call while you're on the call by using the call controls on the conversation panel. A notification is then sent to your administrator for review and further action.

To report a phone number as spam, select **Mark spam**.

You can add notes to help your administrator review and block numbers. After you mark a number as spam, it goes into the pending review tab on the **Blocked numbers** page.

How to avoid call disconnection

Avoid the following actions to prevent call drops:

- Refresh your browser or select browser bookmark icons when you're in an active call. When you select refresh, and select leave on the confirm refresh dialog, the page will unload and you'll be disconnected from the call. The customer will hear hold music until you rejoin the call from the **My work items** section of **Omnichannel Agent Dashboard**. If you're disconnected from your browser for more than 90 seconds the call is reassigned to another agent in the queue. The call won't be reassigned if you reconnect within 90 seconds.
- Open other apps that will need access to the microphone. It will result in loss of your audio connection, and the customer won't be able to hear you.
- Open the Customer Service workspace or Omnichannel for Customer Service app in more than one tab in the browser. It causes issues in agent presence.
- Close the session directly to end call. If you do, the conversation moves from active to wrap up. Then if you close the session, the state goes from wrap up to closed. So, we recommend that you go through the conversation status route and select the **End** button and then close the session to take care of the wrap-up activities.

Best practices

- Make sure that you have enabled notifications, and audio and video options in the browser.
- When your shift ends, ensure that you sign out and close your browser through which you access Customer Service workspace. Doing so helps avoid work items being incorrectly assigned to you.
- When you face network or hardware issues, the application displays error or warning messages on the communication panel. Use the information in the messages to resolve the problems. More information: Use diagnostic messages to troubleshoot call issues

See also

Overview of the voice channel
Enable voice consult with Microsoft Teams users
Call a customer

Use agent dashboard and call controls in the voice channel

Article • 09/04/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The voice channel in Omnichannel for Customer Service is integrated directly with Dynamics 365 by way of the agent dashboard. The dashboard offers you a consolidated view of the calling interface, the customer summary, case history, and timeline. The dashboard helps you provide quick, effective, and proactive solutions to customer issues. The agent experience in the voice channel is similar to the chat and other channels, which reduces agent training time and costs.

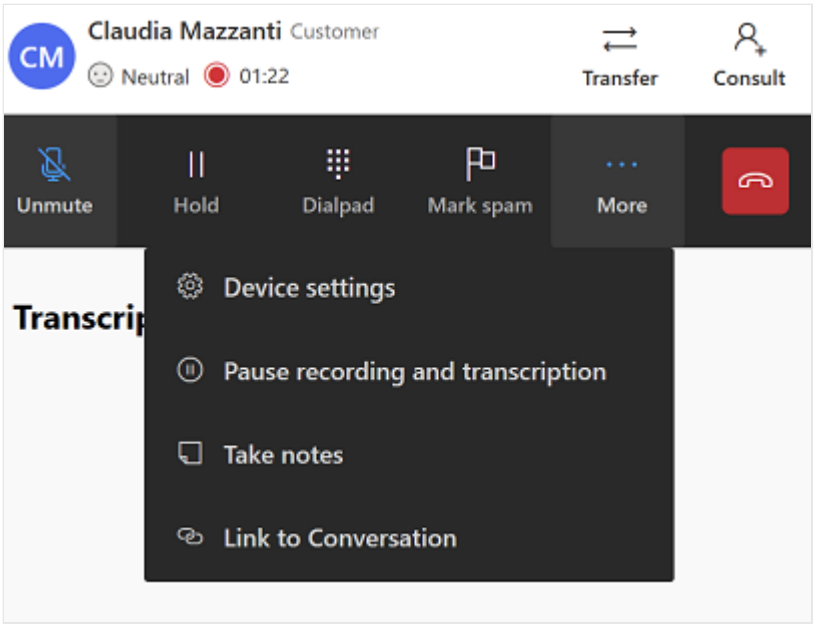
Make and receive customer calls

You can call a customer by using the phone dialer on the **Active Conversation** page or the **Launch dialer** button on the menu. More information: Call a customer

When a customer calls your business, an intelligent bot receives the incoming call. The bot gathers basic information about the customer issue and then transfers the call to you for further action. You'll receive a notification about the incoming call on your agent desktop so you can accept it. The following section describes the call controls and other features you can use during your conversation.

Call controls

The conversation panel in the agent dashboard includes the following call controls that you can use when you call or answer phone calls from customers.



- **Mute**: Mute your microphone so your voice isn't audible to the customer.
- **Hold**: Put the customer on hold; the customer will hear the hold music. You can keep only one caller on hold at a time.
- **Consult**: Select this option to consult with a participant. You can consult with or bring another agent or supervisor into the call. You can have a *public* consultation, where the customer is actively involved in the conversation. Or you can have a *private* consultation, where you can put the customer on hold before you talk to your peers or supervisor.

  > ⓘ Note
  >
  > When you initiate a consult, you are the primary agent and the new participant has a consult role. Select **Transfer** next to the participant to transfer the call to the consulting agent or supervisor. Once the call is transferred, you are the consulting agent and can leave the call without ending the call. The consulting agent becomes the primary agent. If the primary agent leaves the call, the call will end for the customer.

- **Transfer**: Select this option is to transfer the call to an agent, queue, a Teams user, or an external phone number. After you transfer the call, the agent to whom the call is transferred is the primary agent and you'll no longer be on the call. During a transfer to the queue, the customer is automatically put on hold. When you transfer a call to another agent, your number is displayed on the caller ID. The transcription and recording of transferred calls will continue if the administrator has enabled the option. You can disable recording from the dashboard. See: Transfer and consult scenarios

- **End**: End the call.
- **Dialpad**: Select this option to dial an extension number. If you must use the dial pad to send a response while navigating an IVR, select the dial pad icon next to the external participant in the participant list.
- **Mark spam**: Report the incoming call as spam. If you happened to accidentally mark a number as spam, you can select the **Unmark as spam** option.
- **Device settings**: Configure your microphone and speaker settings.
- **Take notes**: Make note of important information or specific details from your conversation with the customer. It's in addition to the call recording and transcription that happen during the conversation.
- **Pause recording and transcription**: If you don't want to capture some details of the conversation—such as bank details, billing, or payment information—you can temporarily pause the transcription and resume it later.
- **Knowledge Articles**: Get a list of knowledge base articles pertaining to the conversation that you can use to resolve the customer issue.
- **Link to conversation**: You can link another conversation, case, customer, or knowledge article to the conversation.

  > ⓘ Note
  >
  > The **Link to conversation** button is disabled after you end the voice call. Open account or contact on a new tab and select **Link to conversation** to link record (customer or case) to conversation.

- **Transcription**: When the transcription and recording service is enabled by your administrator, the conversation between you and the customer is automatically transcribed in real time, which means that you as an agent don't need to take notes during the call. This feature also helps your supervisor or agent (in a call transfer) to see the call history.
- **Sentiment analysis**: The transcript also powers *live* sentiment analysis. This means that you or your supervisor can instantly view and gauge the customer's mood and feeling via the sentiment icons.

Report a phone number as spam

You can report a phone number as a spam call while you're on the call by using the call controls on the conversation panel. A notification is then sent to your administrator for review and further action.

To report a phone number as spam, select **Mark spam**.

You can add notes to help your administrator review and block numbers. After you mark a number as spam, it goes into the pending review tab on the **Blocked numbers** page.

How to avoid call disconnection

Avoid the following actions to prevent call drops:

- Refresh your browser or select browser bookmark icons when you're in an active call. When you select refresh, and select leave on the confirm refresh dialog, the page will unload and you'll be disconnected from the call. The customer will hear hold music until you rejoin the call from the **My work items** section of **Omnichannel Agent Dashboard**. If you're disconnected from your browser for more than 90 seconds the call is reassigned to another agent in the queue. The call won't be reassigned if you reconnect within 90 seconds.
- Open other apps that will need access to the microphone. It will result in loss of your audio connection, and the customer won't be able to hear you.
- Open the Customer Service workspace or Omnichannel for Customer Service app in more than one tab in the browser. It causes issues in agent presence.
- Close the session directly to end call. If you do, the conversation moves from active to wrap up. Then if you close the session, the state goes from wrap up to closed. So, we recommend that you go through the conversation status route and select the **End** button and then close the session to take care of the wrap-up activities.

Best practices

- Make sure that you have enabled notifications, and audio and video options in the browser.
- When your shift ends, ensure that you sign out and close your browser through which you access Customer Service workspace. Doing so helps avoid work items being incorrectly assigned to you.
- When you face network or hardware issues, the application displays error or warning messages on the communication panel. Use the information in the messages to resolve the problems. More information: Use diagnostic messages to troubleshoot call issues

See also

Overview of the voice channel
Enable voice consult with Microsoft Teams users
Call a customer

Manage voicemails

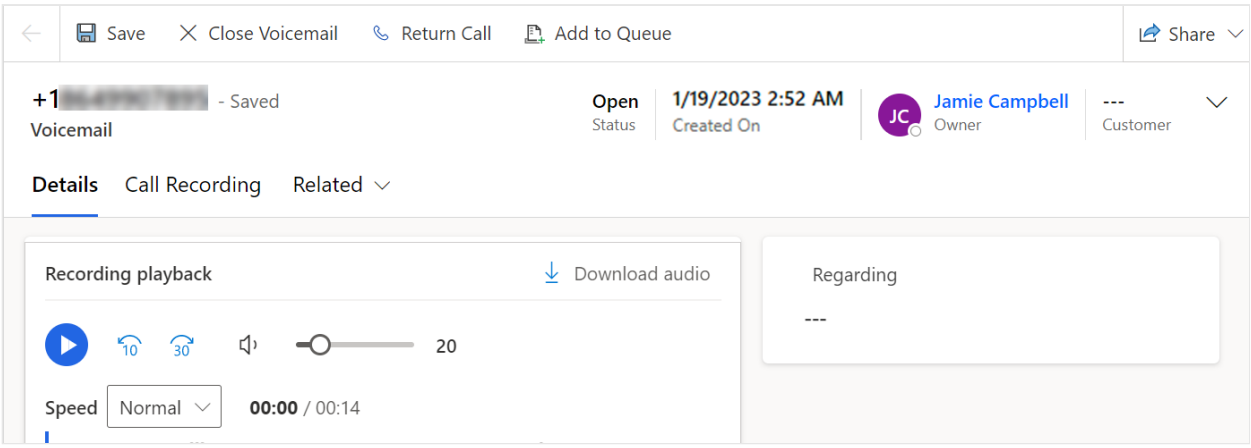
Article • 02/02/2023

As an agent, you can access the voicemails recorded by customers on your direct inward dial number or through work items that have been routed to you.

Manage the voicemails that you receive

You can view the voicemails in one of the following ways:

- On the **Customer Service Agent Dashboard**, in **My Open Activities**, select the vertical ellipses, and then select **Other Activities** > **Voicemail**.
- On the **Omnichannel Agent Dashboard**, in **Open work items**, select the vertical ellipses for your number, and then select **Assign to me**.
- If an inbox is configured for you, you can view the assigned and unassigned voicemails. Go to your inbox, and select **Assigned voicemails**, and then select the voicemail that you want to hear. If you access an unassigned voicemail and then close it, you won't be able to access it again.



You can do the following tasks for the voicemail that you open:

- **Regarding**: Set the regarding of the voicemail.
- **Customer**: If the customer isn't automatically identified, set the customer of the voicemail.
- **Save**: Save changes to the voicemail. Some settings require an explicit save action.
- **Close Voicemail**: Moves the voicemail to the closed state.
- **Return Call**: Displays a dialer with the customer number automatically filled in if you have outbound profiles configured. More information: Outbound profiles
- **Add to Queue**: Add the voicemail to a different queue. If the voicemail is routed to a pick workstream, it will be available as a pick item in the new queue. If the

voicemail is routed to a push workstream, it will be assigned to an agent in the new queue.

- **Call Recording**: Select the tab to view the original voice call recording that preceded the voicemail. If the call goes straight to voicemail and the customer didn't talk to a bot, a recording or transcript won't be available on this tab. Additionally, if your voice workstream was set to have transcription only and the customer talked to a bot, you won't see a call recording here, only the transcript will be available.
- **Download audio**: Select to download the voicemail.
- **Share**: Select to email or copy the link to the voicemail. You can also manage the user access to the voicemail.

Next steps

Transfer calls and consult with other users
View call recordings and transcripts

Transfer calls and consult with users in the voice channel

Article • 08/23/2023

You can transfer calls or consult with other agents or supervisors to collaborate with them on questions that you might have when you're on a call with a customer.

To familiarize yourself with the call controls, see Understand how to use the agent dashboard and call controls.

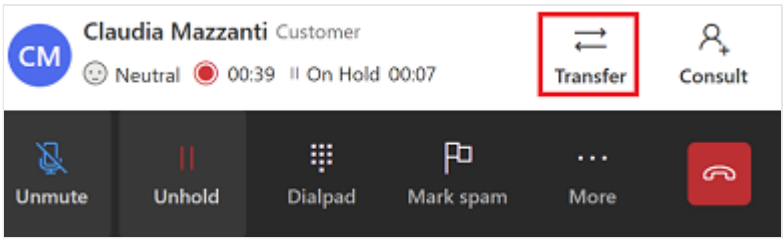
How you can transfer calls

When you receive an incoming call, you can transfer the call to an agent, a queue, a public switched telephone network(PSTN) Teams user, or an external PSTN number. After you transfer the call, the following actions occur:

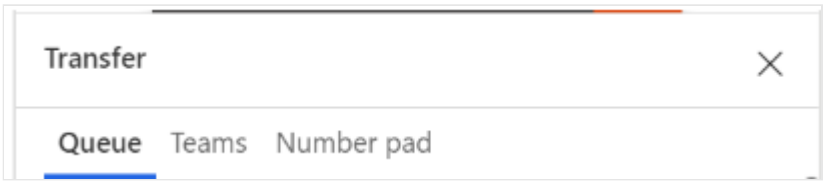
- The customer is automatically put on hold. Hold music plays for the customer.
- The primary agent must manually remove the customer from hold.

Transfer the call

1. Select **Transfer** in the call window.



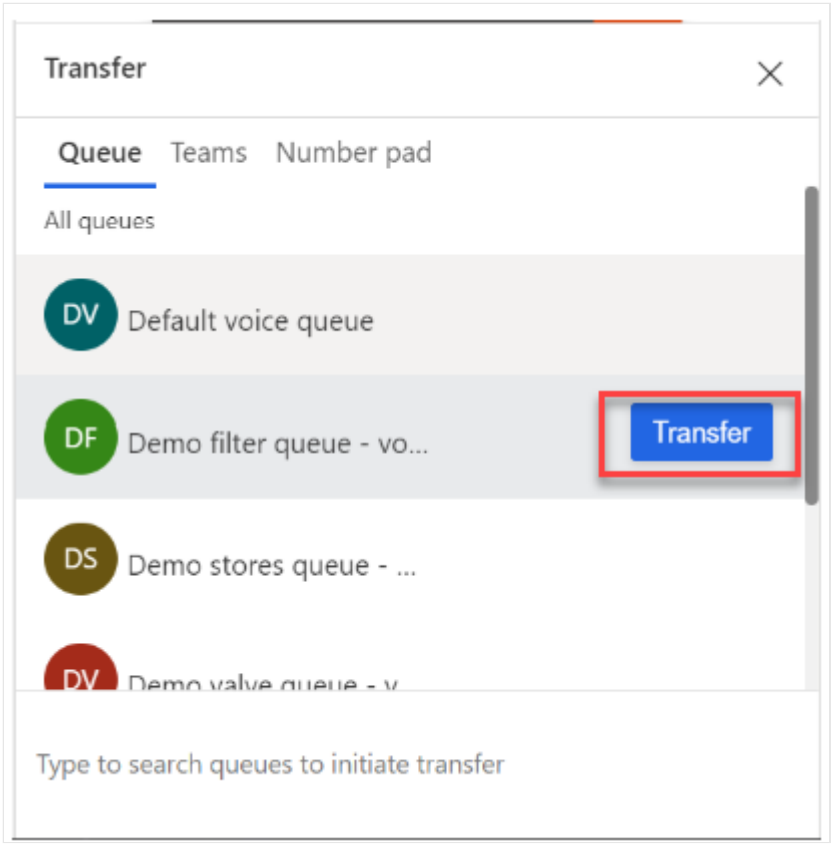
   The **Transfer** dialog box appears. The **Queue**, **Teams**, and **Number pad** tabs are displayed.



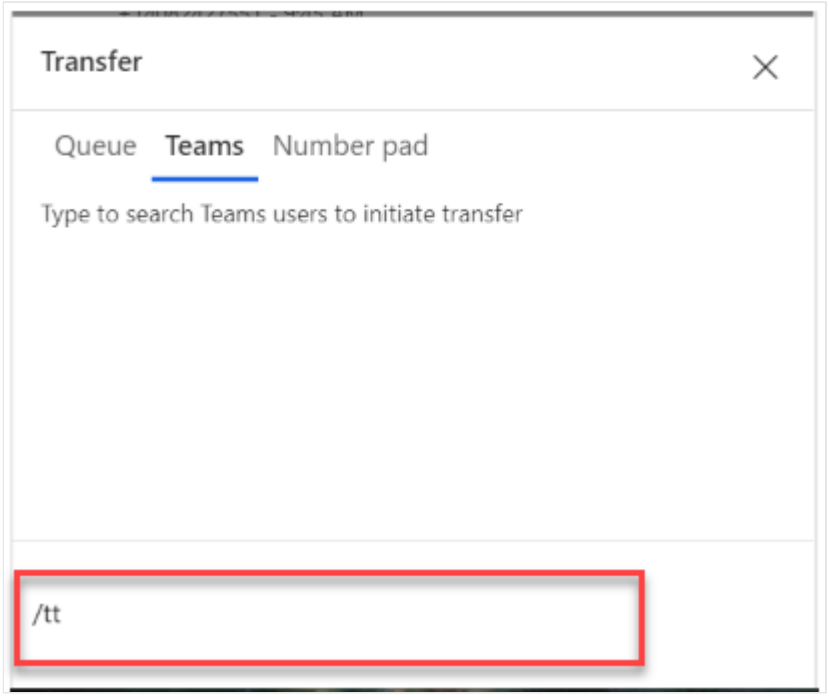
2. Based on your requirement, perform one of the following steps.

   - **Transfer to a queue**: Select **Queue**, search for the queue you want to transfer the call to, and then select **Transfer**. The customer is put on hold. The agent who picks up the transferred call will become the primary agent and you will

become the secondary agent and will be removed from the call. The primary agent must manually remove the customer from hold.



- **Transfer to an external PSTN number**: Select **Number pad**. On the number pad that appears, enter the customer's country code, phone number, and then select **Call** to make your call.
- **Transfer to Teams user via PSTN**: Select **Teams**, and use the search option to search for a Microsoft Teams user. The results are filtered based on the name and the live presence of the users in Microsoft Teams.



If you've selected either the external PSTN number or Teams to transfer the call, you can talk to the secondary agent who picks up the call, while the customer is on hold. To complete the call transfer, you must select the transfer button next to the secondary agent name in the call window. The secondary agent is now the primary agent and you will be removed from the call. However, the secondary agent is disconnected from the call if the transfer is not completed by primary agent within eight minutes.

> **Note**
>
> The call recording and transcript of the conversation with the Teams user is saved in the application for reporting and compliance.

How you can use consult to collaborate with other agents or supervisors

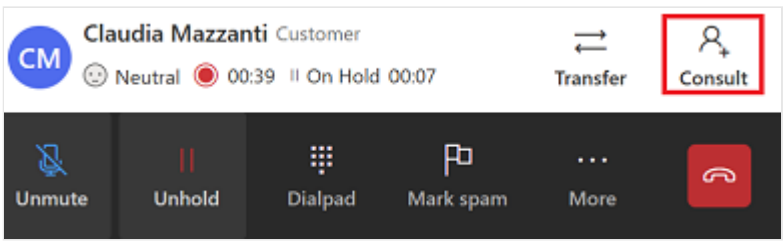
You can collaborate with another agent, a supervisor, or an external participant (PSTN number or a Teams PSTN number) by using the consult option.

When you initiate a consult, the following actions occur:

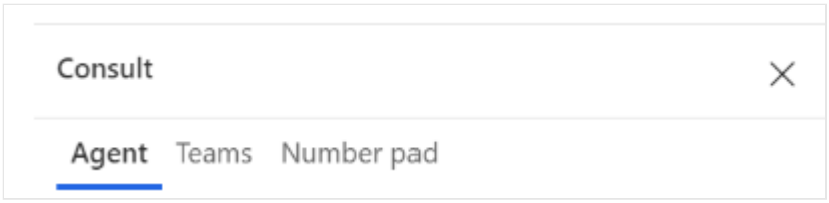
- You are the primary agent.
- The customer is automatically put on hold. Hold music plays for the customer.
- When the invited collaborator joins the call, they have a consult role.
- The primary agent must manually remove the customer from hold. During a consult, the primary agent can choose to transfer the call to the new participant.
- If the primary agent ends the call, the call will end for everyone.
- If the primary agent refreshes their browser, all the participants will be on hold until the primary agent returns to the call.

Consult with another user

1. Select **Consult** in the call window.

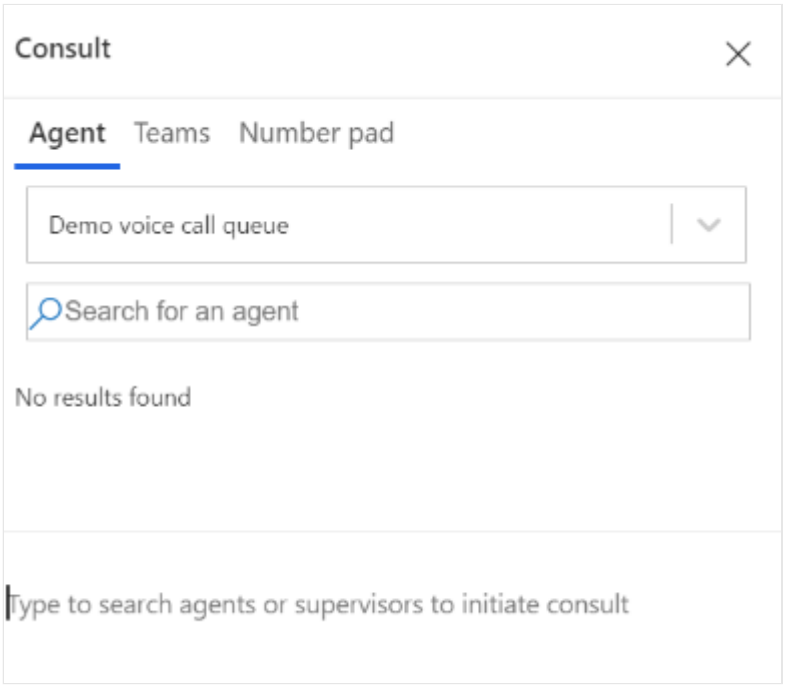


The **Consult** dialog box appears. The **Agent**, **Teams**, and **Number pad** tabs are displayed.



2. Based on your requirement, perform one of the following steps. 4

- **Consult with an internal agent or supervisor**: Select **Agent**. You can either have a call or chat with an internal agent. Select the conversation channel and then search for the agent you'd like to consult with.

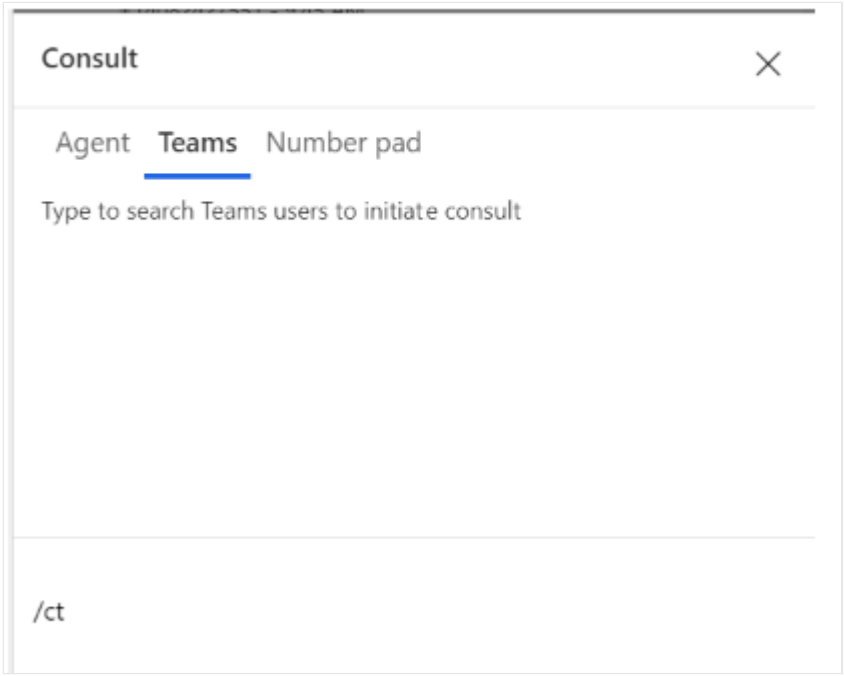


- **Consult, then transfer**: The primary agent who initiated the consult can transfer the call to any participant involved in the consult. To transfer a conversation to the consulting agent in the conversation, perform the following steps:
  - If the consult is with an external participant (PSTN or Teams through PSTN), select **Transfer** next to the external phone number in the call window.
  - If the consult is with an internal agent or a supervisor, select **Transfer** on the call controls. See: Call controls
  - After the call is transferred, the primary agent becomes the consulting agent and can leave the call without ending the call. The consulting agent becomes the primary agent. If the primary agent leaves the call, the call will end for the customer.

- **Consult with external PSTN number**: Select the **Number Pad**. On the number pad that appears, enter the customer's country code, phone number, and then select Call to make your call. By default, the consultation is private, the

customer is on hold while the primary agent speaks with the new participant. You can also have a public consultation, where the customer is actively involved in the conversation.
To make the consultation public, select **Hold** to put the call on hold. When the secondary agent has joined the conversation, remove the customer from hold to continue the consultation.

- **Consult with Teams user with PSTN**: Select **Teams** and use the search option to search for and select the Microsoft Teams user you'd like to consult with.
  See: Enable voice consult with Microsoft Teams users



The call recording and transcript of the conversation with the Teams user is saved in the application for reporting and compliance.

See also

Overview of the voice channel
Enable voice consult with Microsoft Teams users
Call a customer

View call recordings and transcripts

Article • 08/02/2023

If your administrator has enabled the option to view call recordings and transcripts, when conversations between agents and customers end, both supervisors and agents can view the recordings and transcripts of those conversations, play back the recordings, and view the sentiment analysis and other analytics related to the conversations.

> ⓘ **Note**
>
> Many countries and states have laws and regulations that apply to the recording of public switched telephone network (PSTN), voice, and video calls, and may require that users first consent to the recording of their communications. It is your responsibility to use the call recording capabilities in compliance with the law. Before using call recording features, you must obtain consent from the parties of recorded communications in a manner that complies with all applicable laws for each participant.

Introduction

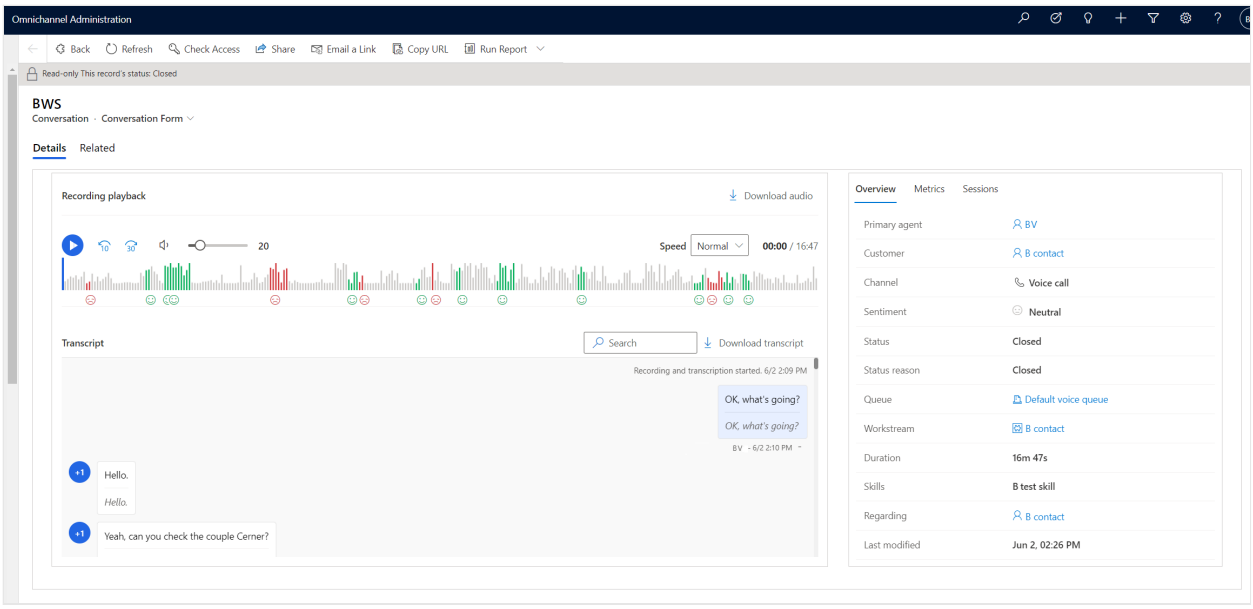
As an agent, you can access the recordings and transcripts for completed calls by accessing the closed conversations in one of the following ways:

- If the form selector is available, on your session window, select the dropdown button for **Active Conversation** and select **Closed Conversation**.
-
- Select the name of the contact, and then in the **Timeline** section, hover the mouse over the closed conversation that you want to view, and then select the **Open Record** icon.

> ⓘ **Note**
>
> Users with the System Administrator role can access conversations that are handled by other agents.

Call recording and transcript controls

The **Details** tab of the **Conversation - Conversation Form** displays the call recording details.



Recording playback

- **Play**: Select the button to listen to the conversation audio.
- **Rewind** or **Fast-forward**: Select the buttons to either rewind in 10-second increments or fast-forward in 30-second increments.
- **Volume**: Move the slider to adjust the volume to your desired level.
- **Download audio**: Download an .mp4 audio file of the complete conversation.
- **Speed**: From the dropdown menu, select the playback speed of the conversation, whether slower or faster. **Normal** is the default, and is the speed in which the conversation was recorded.
- **Conversation scroll bar**: Move the scroll bar to any point of the conversation, or listen to it from beginning to end. When you select a location in the recording visualization, the transcript also moves to same place in the conversation.
- **Sentiment**: Colors and emojis help you quickly analyze the sentiment of the conversation. Green indicates positive sentiment, red indicates negative sentiment, and grey indicates neutral sentiment.

Transcript

- **Search**: Enter keywords in the search field to locate desired sections of conversation.

- **Download transcript**: Open an HTML file of the conversation transcript in your browser.

> **Note**

> Inline images and rendering of videos is not supported in downloaded transcripts.

The **Overview** section of the Conversation Form displays the following details:

- **Primary agent**: The name of the agent who conducted the call.
- **Customer**: The name of the customer the call was with.
- **Channel**: The type of communication conducted.
- **Sentiment**: The average sentiment of the call.
- **Status**: The state of the communication.
- **Status reason**: The reason for the status of the call.
- **Queue**: The queue the call was conducted in.
- **Workstream**: The workstream the call was conducted in.
- **Duration**: The total amount of time of the call, from start to finish.
- **Skills**: The list of agent skills.
- **Regarding**: The link to the customer record.
- **Last modified**: The date and time that the call was last edited.

The **Metrics** tab of the Conversation Form displays the following details:

- **Talking speed**: The rate of speed in which participants conversed during the call.
- **Talk to listen ratio**: The ratio in which the agent spoke versus listened to the customer.
- **Average pause**: The average amount of time in which the conversation was paused.
- **Longest customer monologue**: The longest amount of time that the customer spoke during the conversation.
- **Switches per conversation**: The number of times the conversation switched from agent to customer, and vice versa.

The **Sessions** tab displays details about the number of voice calls between the agent and the customer, and the duration, date, and time of the conversation.

See also

Agent experience of voice calls and agent dashboard
Call a customer
View and understand call summary page in the Sales Hub app

Monitor calls

Article • 02/16/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

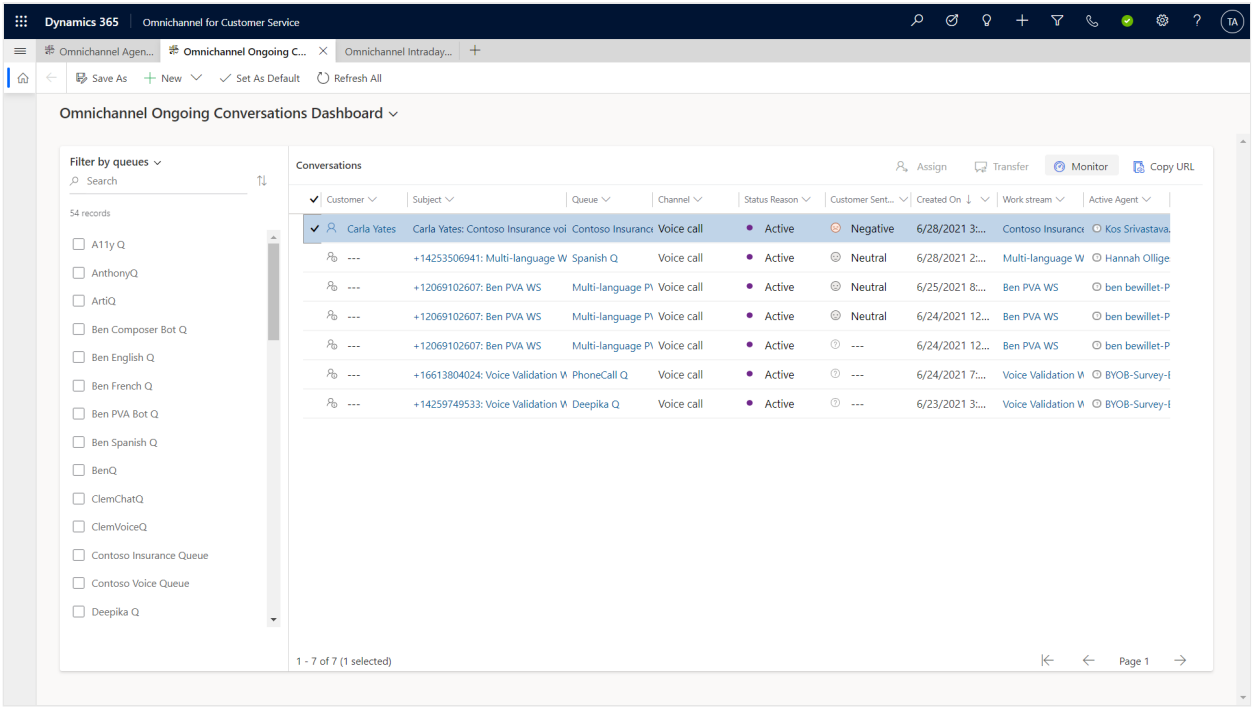
As a supervisor, it's useful to be able to monitor the calls between your agents and their customers without interrupting them to help identify which calls need attention. You can monitor the conversations without being seen as a participant by the agent or customer, as well as step into conversations when additional support is needed.

Prerequisites

To monitor calls in the voice channel, you must have the **Omnichannel Supervisor** role. This role allows you to join and consult in ongoing conversations.

Monitor ongoing conversations

On the **Omnichannel Ongoing Conversations** dashboard, you, as a supervisor, can view a list of active conversations, including customer sentiment analysis for each call.

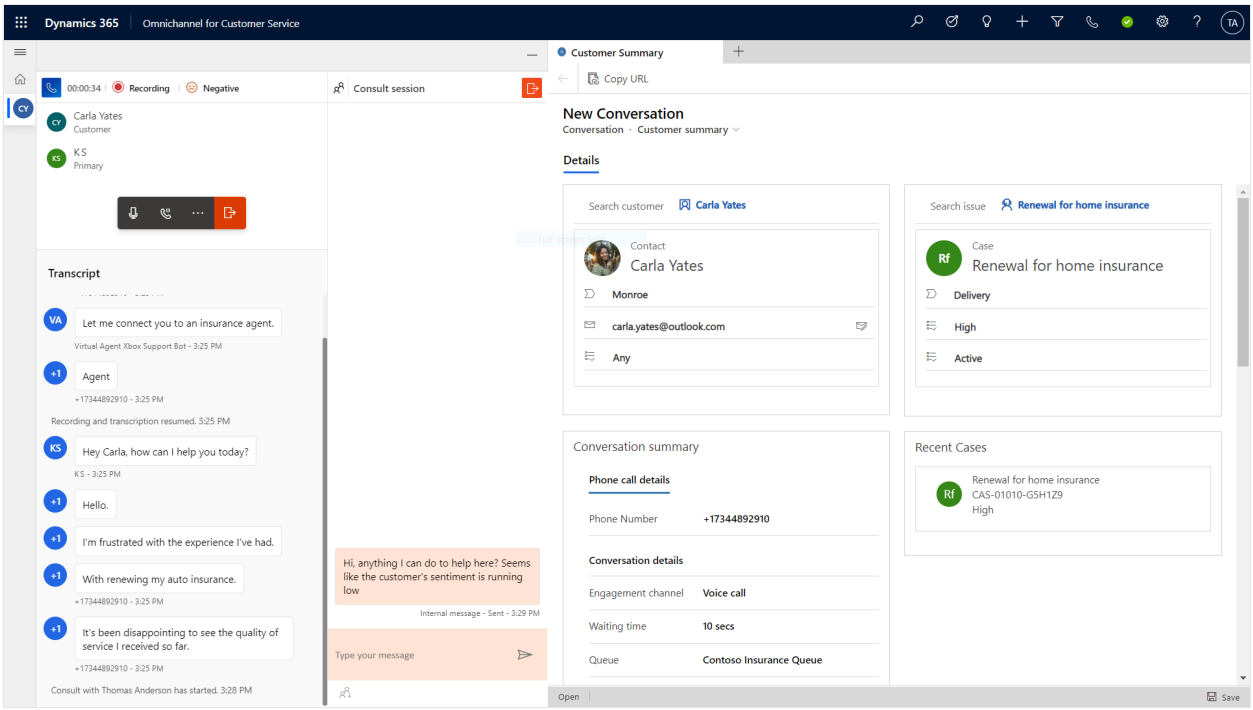


To find out details about an individual conversation:

- On the **Omnichannel Ongoing Conversations dashboard**, select it in the list of active conversations, and then select **Monitor**.

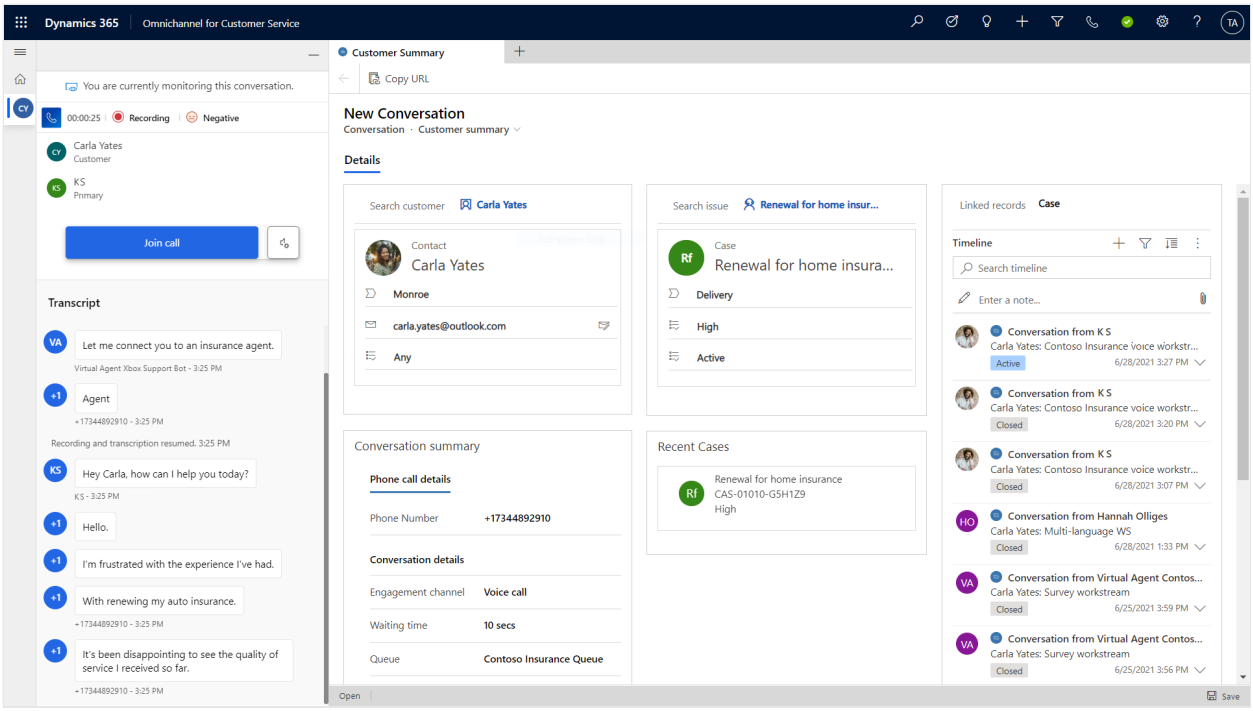
Consult with an agent during a conversation

As a supervisor, you can privately consult with an agent by sending them messages that are hidden from the customer.



Join a conversation (also known as barge)

If needed, you can select **Join call** to enter the conversation and speak with the agent, customer, or chat with the agent privately. When you join a conversation, the agent can see that you have joined.



By joining a conversation, you have access to call controls that allow you to capture details about the conversation, pause the conversation if needed, and engage with the agent and customer as needed.

See also

Introduction to the voice channel
Provision and set up the voice channel
Set up outbound calling
Route incoming calls to agents
Add Azure Bot Service for conversational IVR
View voice calls usage
Configure post-call survey

Pricing scenarios for voice calling

Article • 06/27/2023

The Dynamics 365 Customer Service voice channel is built on Azure Communication Services. Billing for Azure Communication Services uses a pay-as-you-go model and varies per country. Calling and screen-sharing services are billed per minute per participant. More information: Pricing Scenarios.

Azure Communication Services doesn't charge for data egress.

Several call flows are possible. This article describes pricing calculations for the following call scenarios:

- Inbound: A customer calls from a mobile device; an IVR bot escalates the call to a human agent
- Inbound: A customer calls from Microsoft Teams
- Inbound: A customer calls from Teams; a supervisor joins the call to monitor the conversation
- Inbound: A customer calls from a mobile device; the supervisor is invited to consult
- Inbound: A customer calls from Teams; the call is transferred to an agent through Teams PSTN
- Outbound: An agent calls a customer
- Inbound: Azure direct routing
- Outbound: Azure direct routing

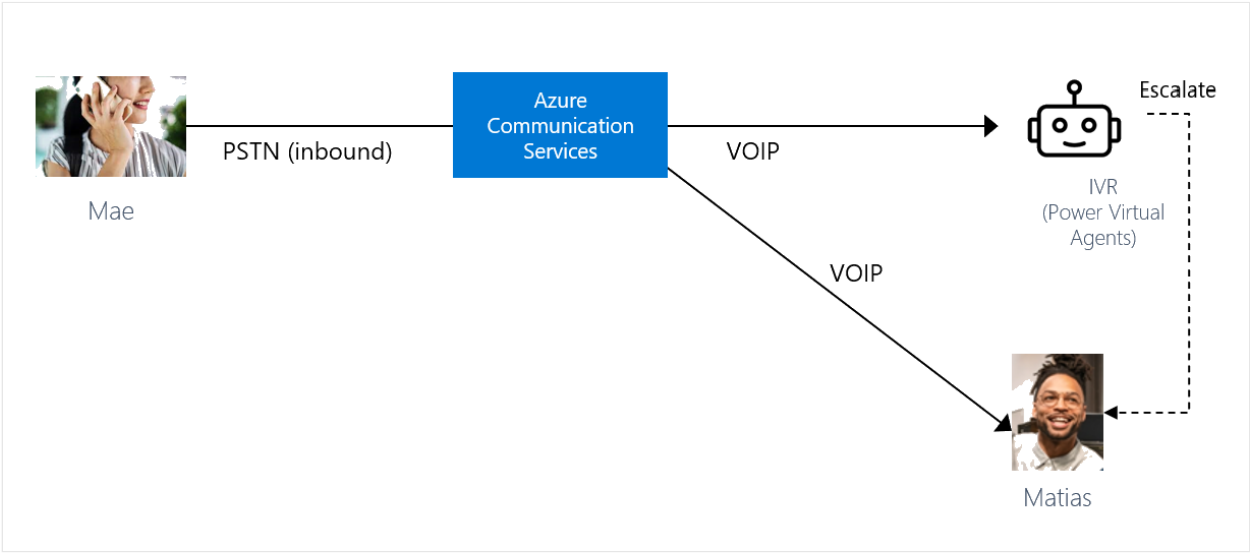
The following table summarizes the pricing for each scenario. The prices in the following examples are for illustrative purposes and might not reflect the latest Azure pricing in your region.

Scenario	Price
PSTN inbound	$0.022 per minute
PSTN outbound	$0.013 per minute
VOIP inbound	$0.004 per minute
SBC to Azure Communication Services	$0.004 per minute
ROW Consumption Unit – Inbound -> PSTN inbound rate	$0.022 per minute
App to App Group Calling User Minute –> VOIP rate	$0.004 per minute
ROW Consumption Unit – Outbound –> PSTN outbound rate	$0.013 per minute

Scenario	Price
Single Channel Mixed Audio Recording –> Recording rate	$0.004 per minute

Inbound: Customer calls from a mobile, call is escalated to a human agent from an IVR bot

Mae calls your Azure Communication Services US toll-free number from a mobile device. The call is routed to a Power Virtual Agents interactive voice response (IVR) bot. Mae interacts with the bot for two minutes. The bot escalates the call to a human agent, Matias. This call lasts eight minutes.



Cost calculation:

- One participant on PSTN (inbound from Mae) x 10 minutes x 0.022 per participant per minute = $0.22.
- One participant on Voice over Internet Protocol (VOIP) (inbound to Power Virtual Agents bot) X 2 x $0.004 per minute = $0.008.

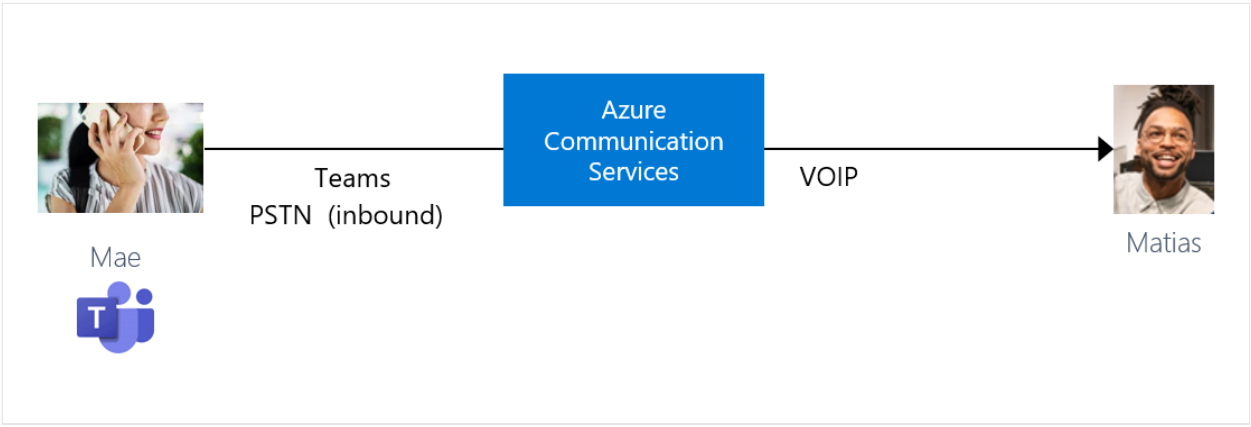
  > **Note**
  >
  > The VOIP call to the Power Virtual Agents bot isn't covered by the intelligent voice bot minutes included in the Voice Channel Add-in license.

- One participant on VOIP (inbound to Matias) x 8 x $0.004 per participant per minute= $0.032.

Total cost for the call: $0.22 + $0.008 + $0.032 = $0.26.

Inbound: A customer calls from Microsoft Teams

Mae calls your Azure Communication Services US toll-free number from Microsoft Teams. The call is routed to Matias and lasts 20 minutes.



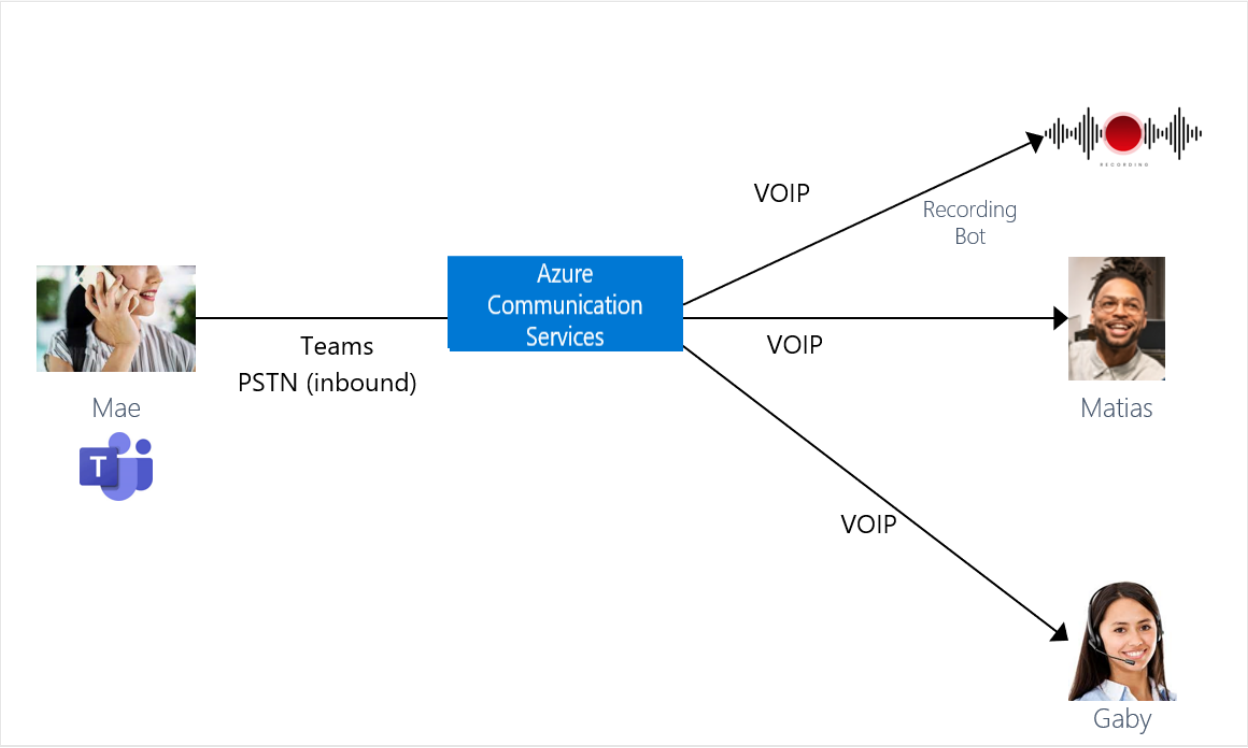
Cost calculation:

- One participant on Teams (inbound from Mae) x 20 minutes x rate per minute (Mae's call is covered by the Teams license)
- One participant on PSTN (inbound from Mae) x 20 minutes x $0.022 per minute = $0.44
- One participant on VOIP (inbound to Matias) x 20 minutes x $0.004 per minute = $0.08

Total cost for the call: $0.44 + $0.08 = $0.52 + applicable Teams charges

Inbound: A customer calls from Teams; a supervisor joins the call to monitor the conversation

Mae calls your Azure Communication Services US toll-free number from Teams. The call is routed to Matias, who starts recording it. Gaby, Matias's supervisor, joins to monitor the conversation. The call lasts 10 minutes. The recording stops when the call ends.



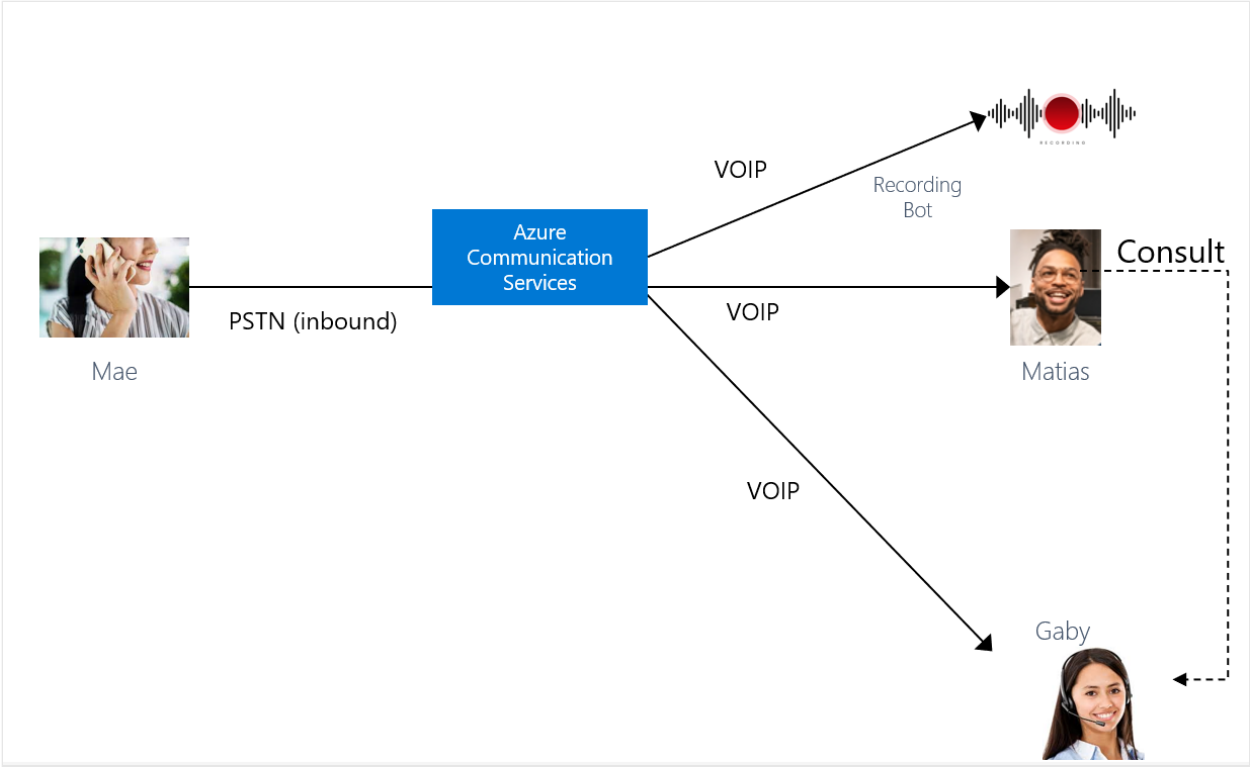
Cost calculation:

- One participant on Teams (inbound from Mae) x 10 minutes x rate per minute (Mae's call is covered by the Teams license)
- One participant on PSTN (inbound from Mae) x 10 minutes x $0.022 per minute = $0.22
- One participant on VOIP (inbound to Matias) x 10 minutes x $0.004 per minute = $0.04
- One participant on VOIP (Gaby joins to monitor) x 10 minutes x $0.004 per minute = $0.04 (charged only when Gaby joins the call)
- Cost to record = 10 minutes x $0.002 per minute = $0.02
- Omnichannel for Customer Service recording bot doesn't introduce extra Azure Communication Services VOIP charges.

Total cost for the call: $0.22 + $0.04 + $0.04 + $0.02 + applicable Teams charges = $0.32 + applicable Teams charges

Inbound: A customer calls from a mobile device; the supervisor is invited to consult

Mae calls your Azure Communication Services US toll-free number from Teams. The call is routed to Matias, who starts recording it. Matias invites supervisor Gaby to join in to consult. The call lasts 20 minutes. The recording stops when the call ends.



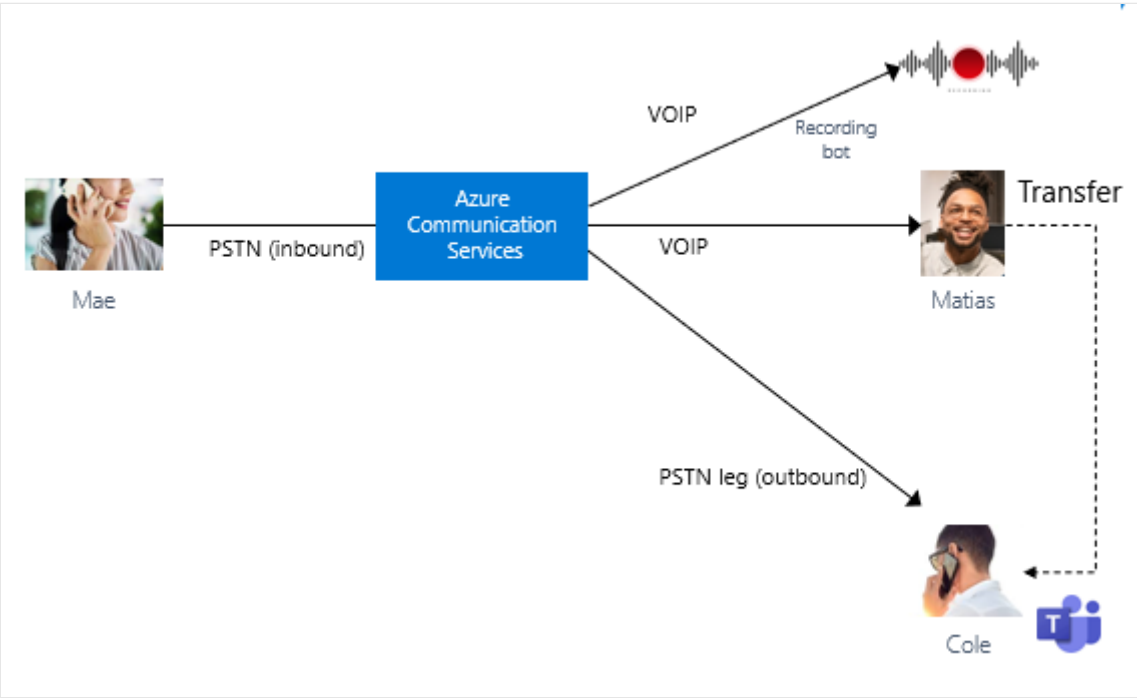
Cost calculation:

- One participant on PSTN (inbound from Mae) x 20 minutes x $0.022 per minute = $0.44
- One participant on VOIP (inbound to Matias) x 20 minutes x $0.004 per minute = $0.08
- One participant on VOIP (Gaby joins to consult) x 10 minutes x $0.004 per minute = $0.04 (charged only when Gaby joins the call)
- Cost to record = 20 minutes x $0.002 per minute = $0.04
- Omnichannel for Customer Service recording bot doesn't introduce extra Azure Communication Services VOIP charges.

Total cost for the call: $0.44 + $0.08 + $0.04 + $0.04 = $0.60

Inbound: A customer calls from Teams; the call is transferred to an agent through Teams PSTN

Mae calls your Azure Communication Services US toll-free number from Microsoft Teams. The call is routed to Matias, who starts recording it. Matias talks to Mae for five minutes and then transfers the call to a product expert, Cole, on Cole's Teams PSTN number. Cole speaks to Mae for another five minutes and ends the call. The recording stops when the call ends.



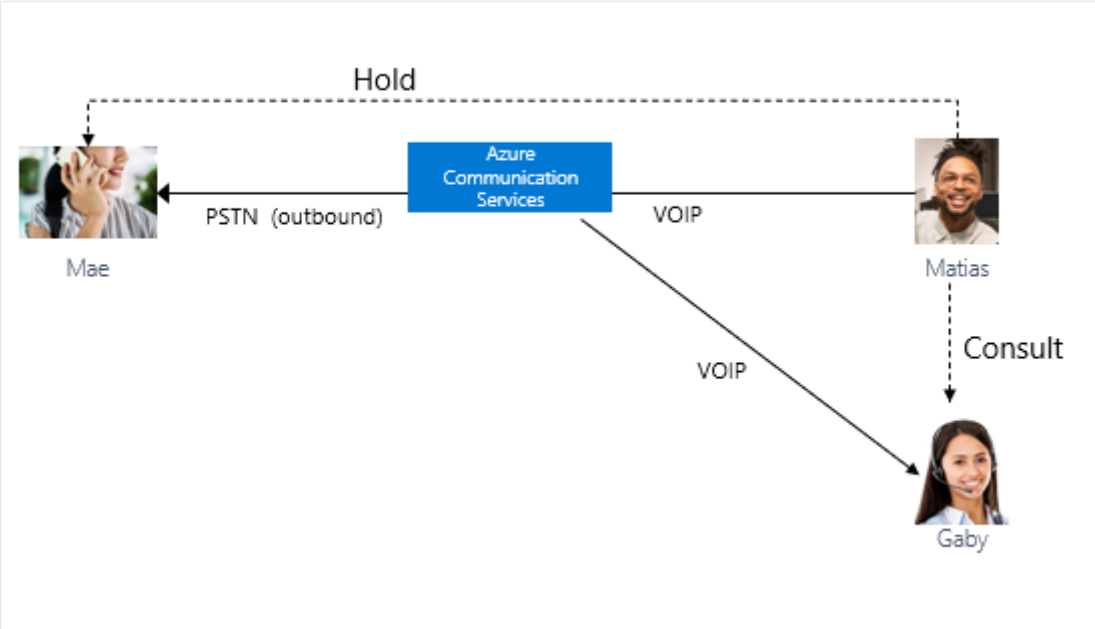
Cost calculation:

- One participant on Microsoft Teams (inbound from Mae) x 10 minutes x rate per minute (Mae's call is covered by the Teams license)
- One participant on PSTN (inbound from Mae) x 10 minutes x $0.022 per minute = $0.22
- One participant on VOIP (inbound to Matias) x 5 minutes x $0.004 per minute = $0.02
- One participant on PSTN (outbound to Cole) x 5 minutes x $0.013 per minute = $0.065
- One participant on Microsoft Teams (outbound to Cole) x 5 minutes x rate per minute (Cole's call is covered by the Teams license)
- Cost to record = 10 minutes x $0.002 per minute = $0.02
- Omnichannel for Customer Service recording bot doesn't introduce extra Azure Communication Services VOIP charges.

Total cost for the call: $0.22 + $0.02 + $0.065 + $0.02 + applicable Teams charges = $0.325 + applicable Teams charges

Outbound: An agent calls a customer

Matias, the contact center agent, makes an outbound call from Omnichannel for Customer Service to Mae, the customer. Matias talks to Mae for two minutes, then puts the call on hold to consult with supervisor Gaby. Matias talks to Gaby for five minutes, ends the consultation, and resumes the call with Mae. The call lasts another three minutes.



Cost calculation:

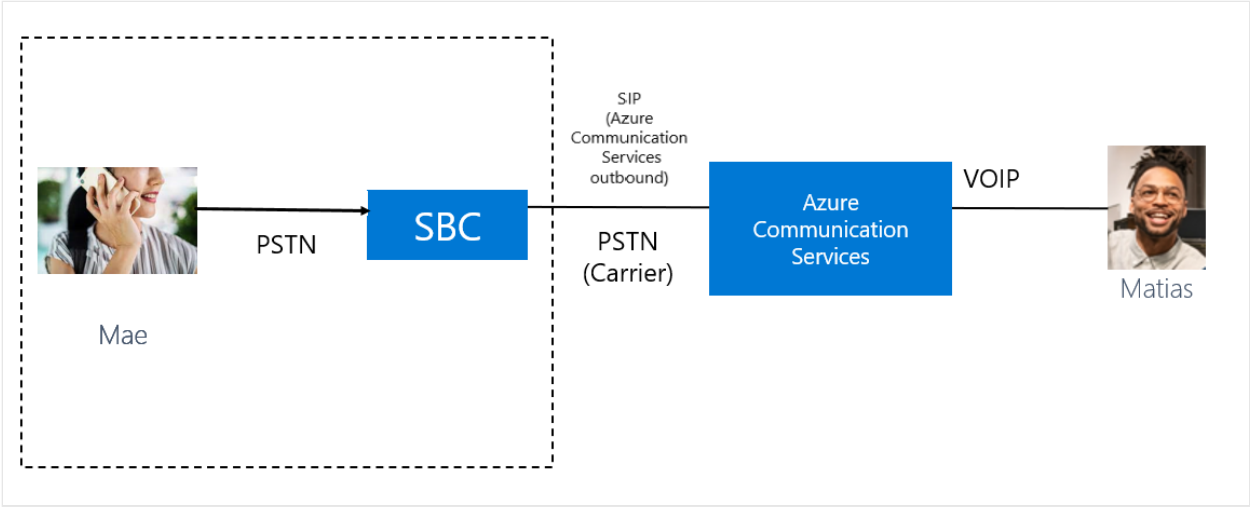
- One participant on PSTN (outbound from Matias) x 10 minutes x $0.013 per minute = $0.013 (the call continues to be charged when Matias puts it on hold)
- One participant on VOIP (Matias to Azure Communication Services) x 10 minutes x $0.004 per minute = $0.04
- One participant on VOIP (Matias to Gaby) x 5 minutes x $0.004 per minute = $0.02

Total cost for the call: $0.13 + $0.04 + $0.02 = $0.19

Inbound: Azure direct routing

Mae calls your Azure direct routing toll-free number from a mobile device. The call is routed to Matias and lasts 10 minutes.

- Matias uses the Omnichannel for Customer Service client application.
- The call goes to a Session Border Controller (SBC) connected through Azure Communication Services direct routing.
- An Omnichannel for Customer Service bot adds Matias to the call by escalating the direct routing call to a group call.



Cost calculation

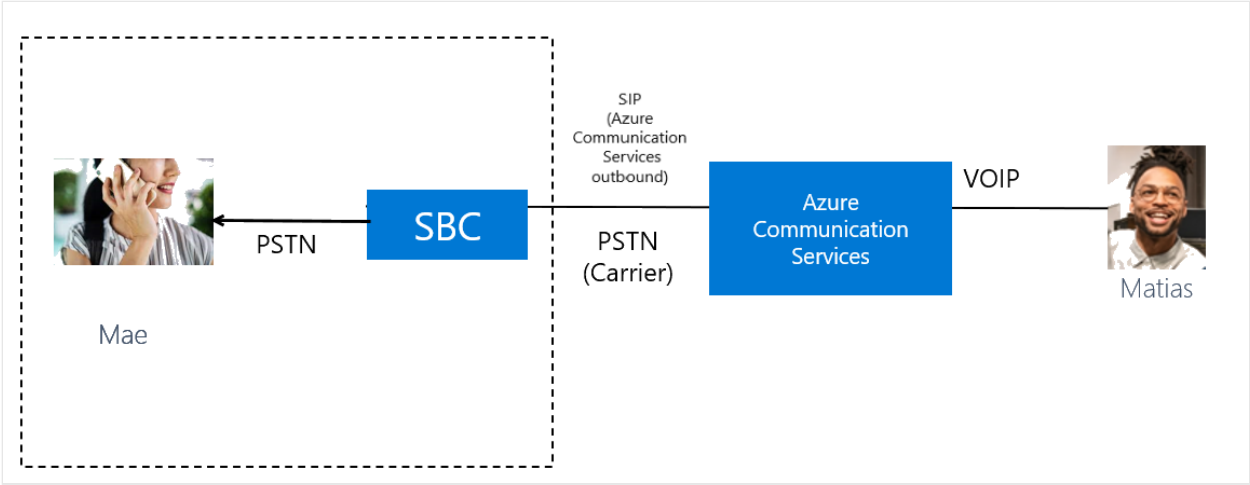
- One participant on PSTN (inbound from Mae) x 10 minutes x rate per the contract with the carrier
- One participant on PSTN (SBC to Azure Communication Services) x 10 minutes x rate per the contract with the carrier
- One participant on Session Initiation Protocol (SBC to Azure Communication Services) x 10 minutes x $0.004 per minute = $0.04
- One participant on VOIP (inbound to Matias) x 10 minutes x $0.004 per minute = $0.04

Total cost for the call: $0.04 + $0.04 + applicable carrier charges = $0.08 + applicable carrier charges

Outbound: Azure direct routing

Matias makes an outbound call from Omnichannel for Customer Service to Mae through Azure direct routing. The call lasts 10 minutes.

- Matias uses the Omnichannel for Customer Service client application.
- A bot in Omnichannel for Customer Service starts an outgoing call through direct routing.
- The call goes to an SBC connected through Azure Communication Services direct routing.
- The bot in Omnichannel for Customer Service adds Mae to a call by escalating the direct routing call to a group call.



Cost calculation:

- One participant on PSTN (outbound from Matias) x 10 minutes x rate per the contract with the carrier
- One participant on PSTN (SBC to Azure Communication Services) x 10 minutes x rate per the contract with the carrier
- One participant on SIP (SBC to Azure Communication Services) x 10 minutes x $0.004 per minute = $0.04
- One participant on VOIP (outbound from Matias) x 10 minutes x $0.004 per minute = $0.04

Total cost for the call: $0.04 + $0.04 + applicable carrier charges = $0.08 + applicable carrier charges

Next steps

Set up outbound calling in the voice channel
Set up inbound calling in the voice channel

FAQ about the voice channel in Omnichannel for Customer Service

Article • 08/25/2023

This article includes frequently asked questions (FAQ) about the voice channel.

Why is the agent unable to make an outbound call?

The agent must be a part of the outbound voice queue to make an outbound call. See Set up outbound calling for information.

Are overflow actions like voicemail and direct callback fulfilled for fallback queues?

No, overflow settings aren't applicable to fallback queues. The settings are ignored, and the routed work item is assigned to the queue. More information: How overflow works

Does the voice channel include real-time keyword recognition or sentiment tracking while an agent is on a call?

Yes, features such as sentiment analysis, agent suggestions for similar cases or knowledge articles, are available in the voice channel.

Is the voice channel PCI DSS compliant?

The voice channel is compliant with Payment Card Industry Data Security Standard (PCI DSS) today, but support for credit card data capture over voice isn't yet available. Agents have the ability to pause or resume call recording and transcription to avoid capturing sensitive information. Agents can also pause transcription to avoid dual-tone multi-frequency (DTMF) tones being captured in the transcript. All data is stored in Dynamics 365 and can be scrubbed by the customer.

Where does Azure Communication Services provide native PSTN services?

To register as a calling provider is a legally complex and country-specific process. Azure Communication Services has a multiyear road map to provide calling plans in different

countries and regions. To see all the countries where PSTN services are available, check the country availability page.

An alternative to Microsoft calling plans is Azure direct routing that allows you to bring your own phone numbers. More information: Azure direct routing

What about countries where Azure Communication Services doesn't provide native PSTN services?

Azure Communication Services is available worldwide, even if it isn't acting as the calling provider in certain countries. For these countries, Azure Communication Services provides a direct routing for local carriers, such as AT&T and Verizon, to connect to Azure Communication Services. With this mechanism, you'll still be able to deploy and use all the features of the voice channel in Dynamics 365.

What codecs are implemented in the voice channel?

The voice channel supports the G.711 and Opus codecs for PSTN and VoIP services.

Can I bring my own phone number?

Yes, you can bring your existing numbers to Omnichannel for Customer Service in the following ways:

- **Import numbers to Omnichannel for Customer Service**

    1. You must first port your existing phone numbers to Azure Communication Services. More information: Quickstart: Port a phone number into Azure Communication Services
    2. You can then import the phone numbers from Azure Communication Services to Omnichannel for Customer Service. More information: Sync from Azure Communication Services

- **Configure Azure direct routing**

    1. Configure a Session Border Controller (SBC) that's connected to your local carrier with Azure Communication Services.
    2. Register the phone number in Dynamics 365. More information: Bring your own carrier

Can my SBC and DNS server be deployed in different regions?

No. We recommend that the DNS server and SBC are deployed in the same region. More information: Bring your own carrier

How can I acquire extra phone numbers from Azure Communication Services?

You can purchase one phone number per tenant for Azure Communication Services through the Azure portal. To acquire phone numbers in bulk or request a specific phone number, follow the instructions to create a special number request order here .

Can I keep my existing contract with my carrier?

Yes, you can.

Can I configure a third-party voice provider in Omnichannel for Customer Service?

Yes, you can use the Dynamics 365 Channel Integration Framework 2.0 connector to integrate third-party contact centers, such as Genesys Engage, Solgari, and NICE inContact.

Does the voice channel tie in with Azure Communication Services or is it an entirely different technology?

The voice capabilities for Dynamics 365 Customer Service are built on Azure Communication Services.

Do I have to buy phone numbers from Azure Communication Services?

No, you don't have to. You can bring phone numbers from another carrier to use in the voice channel using Azure direct routing. More information: Bring your own carrier

If you've already brought numbers from another carrier into Microsoft Teams via Azure direct routing, then you can reuse your SBC and existing telephony infrastructure to bring those numbers into Azure Communication Services for use in the voice channel.

> **Note**
>
> Currently, you can't bring native Teams phone numbers to use in the voice channel.

Is it possible to enable voice integrations outside of the Omnichannel for Customer Service app, such as, by adding omnichannel capabilities to a customer's Dynamics 365 app?

No, the voice channel isn't supported in the other apps of Dynamics 365. It's supported in the Customer Service workspace and Omnichannel for Customer Service apps only.

How can I set up an IVR bot in the voice channel?

See the following articles to set up the interactive voice response (IVR) bot in the voice channel:

- Configure Power Virtual Agents bots for voice
- Integrate third-party IVR systems with voice channel

Should the language of the bot be the same as the primary language configured in the Customer Service admin center or Omnichannel admin center app?

Yes, the primary language of the bot must be the same as that of the voice workstream to which the bot is attached, but you can configure different geographic locales for the bot and the voice workstream to which it's attached. Let's consider an example where English is set as the primary language for the bot and its voice workstream. You can set different locales, such as **English-UK** in the voice workstream and **English-US** in the bot; the bot will speak in English-UK as the workstream locale setting takes precedence.

You can transfer conversations from one bot to another with different primary languages. For example, you can transfer conversations from an English bot to a Spanish bot. But, if you configure different locales:

- The bot's accuracy will depend on the similarities between the two locales.
- The preconfigured entities for the bot such as postal code might not be accurate.
- A bot-to-bot transfer of the conversation with the same language but two different locales isn't possible. For example, the transfer of a conversation from an **English-**

UK bot to an **English-US** bot can't happen. As a workaround, you can make the **English-UK** bot transfer the conversation to another phone number attached to a workstream to which the **English-US** bot is attached.

Can I recover data and phone numbers from a voice trial organization after it has expired?

No, you can't recover your data and phone numbers after the voice trial organization has expired and been deprovisioned.

Is disaster recovery supported for the voice channel?

- Business Continuity and Disaster Recovery (BCDR) for production instances of the voice channel are supported on a geographical basis. In certain regions BCDR will be a fast follow. For details on the geographies that are currently supported and the geographies where BCDR is a fast follow, see Local cloud deployments.
- In supported regions, BCDR policies are based upon business continuity and disaster recovery for Dynamics 365 and SLA for Azure Communication Services. For more information, see Business continuity and disaster recovery and SLA for Azure Communication Services.

Do you provide voice quality SLA for voice in Omnichannel for Customer Service?

No, we don't publish a voice quality SLA as many factors related to voice quality like network connectivity, speed, and bandwidth, can't be controlled. The SLA published for Azure Communication Services applies to the voice channel as well.

What tools are available to isolate performance and quality of voice channel?

The tools for isolating voice performance and quality are available through Azure Communication Services and can be found at Azure Communication Services media quality metrics. It might take up to two hours for the data to appear in the logs.

More information:

- Enable Azure Communication Services logs
- Azure Communication Services voice and video logs
- Integrate with user-facing diagnostics

- Use media quality statistics
- Use pre-call diagnostics
- Enable logging in Diagnostic settings
- Use Azure Communication Services communication monitoring plug-in

Does the voice channel support emergency calling?

Yes, the voice channel supports emergency calling; agents can call the emergency number during a crisis. This feature is currently supported in the United States and Puerto Rico where the emergency calling number is 911. More information: How emergency calling works in the voice channel

What are the applicable pricing scenarios for using the voice channel?

To understand the pricing calculation of various call scenarios, see Pricing scenarios for voice calling.

Why do my customers sometimes hear "Sorry! We couldn't serve you" when they call the contact center number?

Sometimes, when a Power Virtual Agents bot isn't added or an agent is unable to answer the call, your customers will hear the message that they couldn't be served. We recommend agents to refresh their presence regularly to ensure their availability to customers. If the problem persists, reconnect your Power Virtual Agents bot.

See also

Introduction to the voice channel
System requirements for Omnichannel for Customer Service
Supported cloud locations, languages, and locale codes

Introduction to the chat channel

Article • 10/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Chat is a widely desired channel through which customers prefer to reach customer support. Customers appreciate being able to chat with human agents when self-service options don't allow them to solve their own issues.

Dynamics 365 Customer Service offers full featured, first-party chat capabilities for agents to support customers. Chat transcripts from Power Virtual Agents or other live agents and pre-conversation survey data transfers to live agents to maintain full context of the customer issue as it moves between channels and people. Agents can help customers in the language of their choice with real-time translation, and escalate to voice and video if a visual demonstration and audio are needed to help customers. Features like quick replies, whisper, barge, consult, and transfer to other agents ensure agents can handle any workflow while chatting with customers.

A chat widget lets your customers connect with your customer service agents and resolve their queries quickly.

You'll learn how to:

- Add a chat widget
- Configure agent display name
- Configure a pre-conversation survey
- Configure file attachment capability
- Embed chat widget in your website or portal

> **Note**
>
> The chat widget requires session storage and local storage to be functional in your customers' browsers. Make sure to notify your customers to enable cookies in their browsers so these services can work properly.

Disclaimer

Microsoft automatically collects data to improve the reliability and performance of our products and to understand how the products are being used. This information is used to make improvements to the product capabilities over time. The live chat widget in Chat for Dynamics 365 collects telemetry automatically from end users to serve the same purposes.

A few examples of data collected by the live chat widget are as follows.

Data	Example value
OrganizationId	8e9071c2-4415-47aa-b1cb-693631e7fafb
Chat Widget Version	prod
BrowserName	Edge
OSName	Windows
Scrubbed IP Address (last octet redacted)	19.207.000.000

No personally identifiable information (PII) is collected.

If your organization is concerned about the data collected by this service, you have the option to turn off automatic data collection by adding an html attribute to the chat widget script.

```
"data-enable-telemetry" = "false"
```

Videos

To view videos on Omnichannel for Customer Service, see Videos.

Next steps

Add a chat widget

Configure a chat widget

Article • 04/25/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can configure a live chat widget that can be displayed on your portal for customers to interact with bots and human agents.

To add a chat widget, you need to have configured a workstream that defines how chat conversations are routed to queues. More information: Create a workstream

Configure a chat widget

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

   b. Select **Manage** for **Chat**. The **Chat channels** page appears.

   c. Select **Add chat channel**.

2. On the **Channel details** page, enter a name and select a language in the **Name** and **Language** fields, respectively.

3. On the **Chat Widget** page, enter the following details:

   - **Title:** Display name for the chat widget.
   - **Subtitle:** Additional title, such as "We're online".
   - **Theme color:** Choose a color from the list.
   - **Logo URL:** Select the default value or enter the link to the logo that you want to be displayed.
   - **Agent display name:** Select a value from the list.

4. Switch the toggle to **Yes** to enable the following options:

- Proactive chat
- Reconnect to previous chat
- Only show widget during operation hours
  - **Operation hours name**: Select an operating hour setting. More information: Configure operating hours.
- **Only show widget on the provided domains**: Enter the link of the portal.

5. On the **Behaviors** page, configure the following options:

- Custom automated messages
- Pre-conversation survey
- Post-conversation survey
- Authentication settings
- Customer wait time

  > **Note**
  >
  > These settings aren't configurable for the persistent chat feature. More information: **Configure persistent chat**

  - **Show position in queue:** Select this if you want to show customers their position in the queue when they're waiting to interact with an agent. More information: Show customers their queue position
  - **Show average wait time:** Select this if you want to show to customers the average wait time in the queue when they're waiting to interact with an agent. More information: Show customers their average wait time in a queue

- **Customer location detection:** Select a location provider. More information: Set up visitor location detection.

6. On the **User features** page, configure the following options:

- File attachments
- Customer notifications
- Conversation transcripts
- **Voice and video calls**: Switch the toggle to **On** and select the calling option.

- **Screen sharing**: Switch the toggle to **On** and select a provider.
- **Co-browse**: Switch the toggle to **On** and select a provider if you want the agents to see and interact with a customer's web browse.

  > ⓘ Note
  > - You must install a third-party provider from AppSource to use the screen sharing or co-browse feature.
  > - You can select only one co-browse provider and or one screen sharing provider for each chat widget. Only those co-browse and screen sharing providers that have published a solution on AppSource will appear in the lists.

7. Select **Save and close**.

Configure customer notifications

You can configure visual and sound notifications to be sent to customers when they're interacting with agents through the chat widget on your organization portal. If the chat window is minimized or isn't active, a sound notification is played when a message arrives and a count of the unread messages is displayed.

Perform the following steps to enable the customer notifications:

1. In Customer Service admin center or Omnichannel admin center, edit a chat widget, and on the **Chat channel settings** page, select the **User features** tab.
2. For **Customer notifications**, switch the toggle to **On**. The following checkboxes are displayed as selected:

   - **Show number of new messages**
   - **Play sound notifications for new messages**

3. Keep the default settings or select one of them depending on your requirement.

You can also configure the customer notifications when you're configuring the chat channel.

Configure a chat widget in Omnichannel Administration

> ⓘ Important

Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

The information in this section is not applicable if you are using the Omnichannel admin center app in the latest version of Omnichannel for Customer Service.

1. Sign in to Dynamics 365 and select Omnichannel Administration.
2. Go to **Channels** > **Chat**.
3. Select **New**. The **New Chat Widget** page is displayed.
4. On the **General settings** tab, specify the information for the following fields, depending on the type of chat you want to configure. The **Customer waiting** and **Chat Reconnect** options are available only for live chat.

Section	Field	Description	Example value
General information	**Name**	Specify the name of the widget.	Contoso chat
	Language	Select the language of the chat widget from the list.	English - United States
	Agent display name	Select an agent display name type from the list: **Full name**, **First name**, **Last name**, and **Nick name**. More information: Configure agent display name	Full name
	Authentication settings	Select an authentication setting from the list. This is an optional field. More information: Create chat authentication settings	Chat authentication

Section	Field	Description	Example value
Conversation Mode	**Select mode**	Select the conversation mode from the list. For more information, see: Persistent chat	Persistent chat or Live Chat

Section	Field	Description	Example value
Work distribution	**Work stream**	Select a work stream from the list. Initially, a default work stream is selected. More information: Understand and create work streams **Note:** If you save the chat widget, you can't edit the **Work stream** field. If you want to edit the field, you must delete the chat widget and create a new one.	Live work stream

Section	Field	Description	Example value
Proactive chat	**Enable Proactive Chat**	Select whether to enable proactive chat. More information: Configure proactive chat	Yes

Section	Field	Description	Example value
File attachments	**Enable file attachments for customers**	Select whether to allow customers to attach and send files as attachments. More information: Configure file attachment capability	Yes
	Enable file attachments for agents	Select whether to allow agents to attach and send files as attachments. More information: Configure file attachment capability	Yes

Section	Field	Description	Example value
Chat Transcripts	**Allow download of transcript**	Select whether to allow chat transcripts to be downloaded. More information: Configure download and email of chat transcripts	Yes
	Allow email of transcript	Select whether to allow chat transcripts to be emailed. More information: Configure download and email of chat transcripts	Yes

Section	Field	Description	Example value
	Email Template	If you selected **Yes** for the **Allow email of transcript** field, the **Email Template** field is displayed. Select the email template you want to use to send the chat transcript as an email to the customer.	Conversation transcript email template
	From mailbox	If you selected **Yes** for the **Allow email of transcript** field, the **"From" mailbox** field is displayed. Select the mailbox from which you want to send the chat transcript email to the customer.	Contoso

Section	Field	Description	Example value
Customer waiting	**Show position in queue**	Select whether to show customers their position in the queue when they're waiting to interact with an agent. More information: Show customers their position in a queue	Yes
	Show average wait time	Select whether to show customers average wait time in the queue when they're waiting to interact with an agent. More information: Show customers their average wait time in a queue	Yes

5. Select **Save**. The following sections are displayed:

   - **Code snippet:** The code snippet that you need to embed in the HTML source of your website to display the chat widget is displayed in the **Widget snippet** box.
   - **Chat Reconnect:** The toggle to configure options for providing a reconnect link to the chat user is displayed. More information: Configure reconnection to a previous chat session

6. On the **Automated messages** tab, set up automated messages for your chat widget. More information: Configure automated messages

7. On the **Surveys** tab, specify the information for the following fields.

Section	Field	Description	Example value
Pre-conversation survey	Pre-conversation survey	Select whether to set up a pre-chat survey in the chat widget. The survey will be shown to users before a conversation is initiated.	Yes
Pre-chat unauthenticated questions	Pre-chat unauthenticated questions	If you set **Yes** for the **Pre-conversation survey** field, the **Pre-chat unauthenticated questions** section is displayed. Add the pre-chat questionnaires More information: Configure a pre-conversation survey	Product
Post-conversation survey	Turn on	If you set to **Yes**, you can configure a post-conversation survey to be presented to customers. More information: Configure a post-conversation survey	

8. On the **Conversation options** tab, specify the information for the following fields.

Section	Field	Description	Example value
Voice and video calls	Call options	Select a call option from the list: **No calling:** Agents can't make voice or video calls. **Video and voice calling:** Agents can make both voice and video calls. **Note:** Video calling is not available in Unified Service Desk. **Voice only:** Agents can make only voice calls.	Video and voice calling
Visual engagement	Screen sharing	Select whether to enable third-party screen sharing. You must install a third-party provider from AppSource to use the feature.	Enabled
Visual engagement	Screen sharing provider	Select the provider from the list.	*Screen sharing provider*

Section	Field	Description	Example value
Visual engagement	Co-browse	Select whether to enable third-party co-browse. You must install a third-party provider from AppSource to use the feature.	Enabled
Visual engagement	Co-browse provider	Select the provider from the list.	*Co-browse provider*

> **Note**
>
> You can select one co-browse provider and/or one screen sharing provider for each chat widget. Only co-browse and screen sharing providers that have published a solution on AppSource will appear in the lists.

9. On the **Design** tab, specify the information for the following fields. The offline settings are available only when the operating hours are set.

Section	Field	Description	Example value
Online	Theme color	Select a color from the list for the chat widget.	Blue
Online	Logo	Enter a link for the image that's hosted on a publicly available site.	https://oc-cdn-ocprod.azureedge.net/livechatwidget/images/chat.svg
Online	Title	Specify the name for the widget that's displayed for customers in the chat widget.	Let's Chat!

Section	Field	Description	Example value
Online	Subtitle	Specify the name for the widget that's displayed for customers in the chat widget.	We're Online
Online	Position	Specify the position of the widget.	Bottom right
Online	Operating hours	Select an operating hour window for the chat widget from the list. More information: Create and manage operating hours	Regular shift
Online	Turn on sound notifications	Set to **Yes** if you want your customers to receive a sound notification when the chat widget is minimized or not active	

Section	Field	Description	Example value
Online	Turn on unread message indicator	Set to **Yes** if you want to display the count of unread messages when the chat widget is minimized or not active for the customer.	
Offline	Show widget during offline hours	Set to **Yes** to display the chat widget during the offline hours.	Yes. The default is No; the chat widget will be hidden.
Offline	Theme color	Select a color from the list.	Grey
Offline	Title	Specify a title to be displayed.	We're offline.
Offline	Subtitle	Optionally, specify a subtitle.	No agents are available.

10. On the **Location** tab, perform the following steps:
    a. In the **Widget location** section, select **Add** to specify the website domain where the chat widget must be shown. The domain format should not include the protocol (for example, **http** or **https**).
    b. In the **Visitor location** section, specify whether you need to detect the visitor's location, and then select a **Geo Location Provider**. More information: Set up location detection

> ⓘ **Note**

If no domains are specified, the chat widget can be embedded on any website without restrictions. If you specify a domain, the chat widget can be hosted only on the specified domain.

11. On the **Related** tab, view activity associated with your chat widget, such as survey responses, chat widget locations, and system messages.

12. Select **Save** to save the configurations.

After you configure, agents can get the capabilities while they are in a conversation. To learn more, see Call options and visual engagement in live chat.

Troubleshooting

Errors in creating a chat widget

See also

Configure a pre-conversation survey
Configure agent display name
Configure proactive chat
Configure file attachment capability
Create quick replies
Create and manage operating hours
Create chat authentication settings
Embed chat widget in your website or portal
Embed chat widget in mobile experiences
Supported browsers for live chat widget

Enable resizing of the communication panel

Article • 10/04/2023

Agents can increase or decrease the width of the communication panel for a specific channel by dragging the right edge of the communication panel to the left or right. The resized width of the communication panel is channel specific.

Do the following steps to enable the resizing of the communication panel:

1. In Customer Service admin center, select **Miscellaneous** in **Operations**.
2. Select **Manage** for **New and upcoming features**. The **New and upcoming features** page appears.
3. Select **Resizable Communication Panel**.

Next steps

View the communication panel for conversations

Configure download and email of chat transcripts

Article • 03/21/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Chat for Dynamics 365 Customer Service allows customers to download and email a copy of their chat transcripts. When your administrator enables download and email options, customers can download or request an email of their chat transcript at any time during a chat session. At the end of the conversation, customers can request a transcript. If the customer requests an email of the chat transcript, the email is sent at the end of the conversation.

Prerequisite: Administrators should set up mailboxes before enabling this feature, and must select the **Allow other Dynamics 365 users to send email on your behalf** checkbox for it to work. For more information, see Dynamics 365 Email Setup and Dynamics 365 Email tab options.

Download and email chat transcripts

To configure options to download and email chat transcripts for both customers and agents:

1. In Customer Service admin center or Omnichannel admin center, select the workstream of the chat widget in which you want to configure the settings.
2. Select **Edit** for the chat channel that you want to update, and then select the **User features** tab.
3. For **Conversation transcripts**, set the toggle to **On**, and then select the following check boxes:
    - Allow download of transcripts
    - Allow email of transcripts
4. Select a template in **Email template**.

5. Select a mailbox in **From mailbox**.
6. Select **Save and close**.

Download and email chat transcripts in Omnichannel Administration

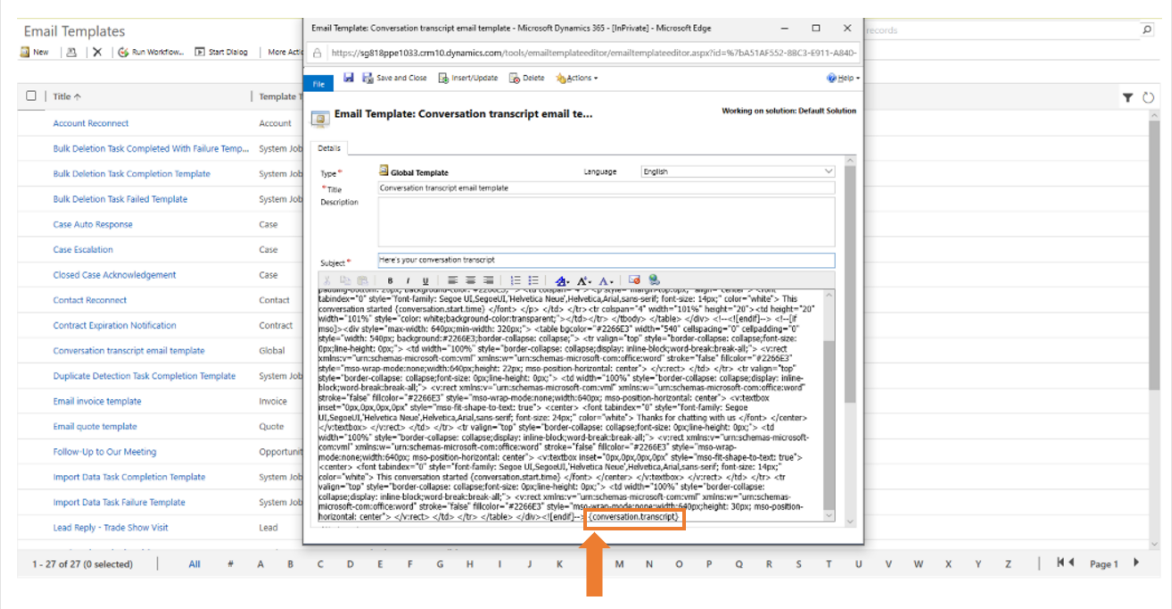
1. Sign in to Omnichannel Administration.
2. Go to **Channels** > **Chat**.
3. Open the chat widget in which you want to configure download and email of chat transcripts.
4. Go to the **General settings** tab.
5. Under **Chat Transcripts**, select **Yes** or **No** for the following:

   - **Allow download of transcript:** Allows your customers to download the chat transcript.
   - **Allow email of transcript:** Allows your customers to send the chat transcript as an email.

   By default, both the options are set to **No**.
6. If you select **Yes** for **Allow email of transcript**, you must select an email template and a mailbox from which the email will be sent. Administrators have a choice to either:

   - Use an email template provided by Chat for Dynamics 365 Customer Service by selecting an option from the **"From" mailbox** drop-down list.
   - Modify the email template provided by Chat for Dynamics 365 Customer Service.
   - Create their own email template.

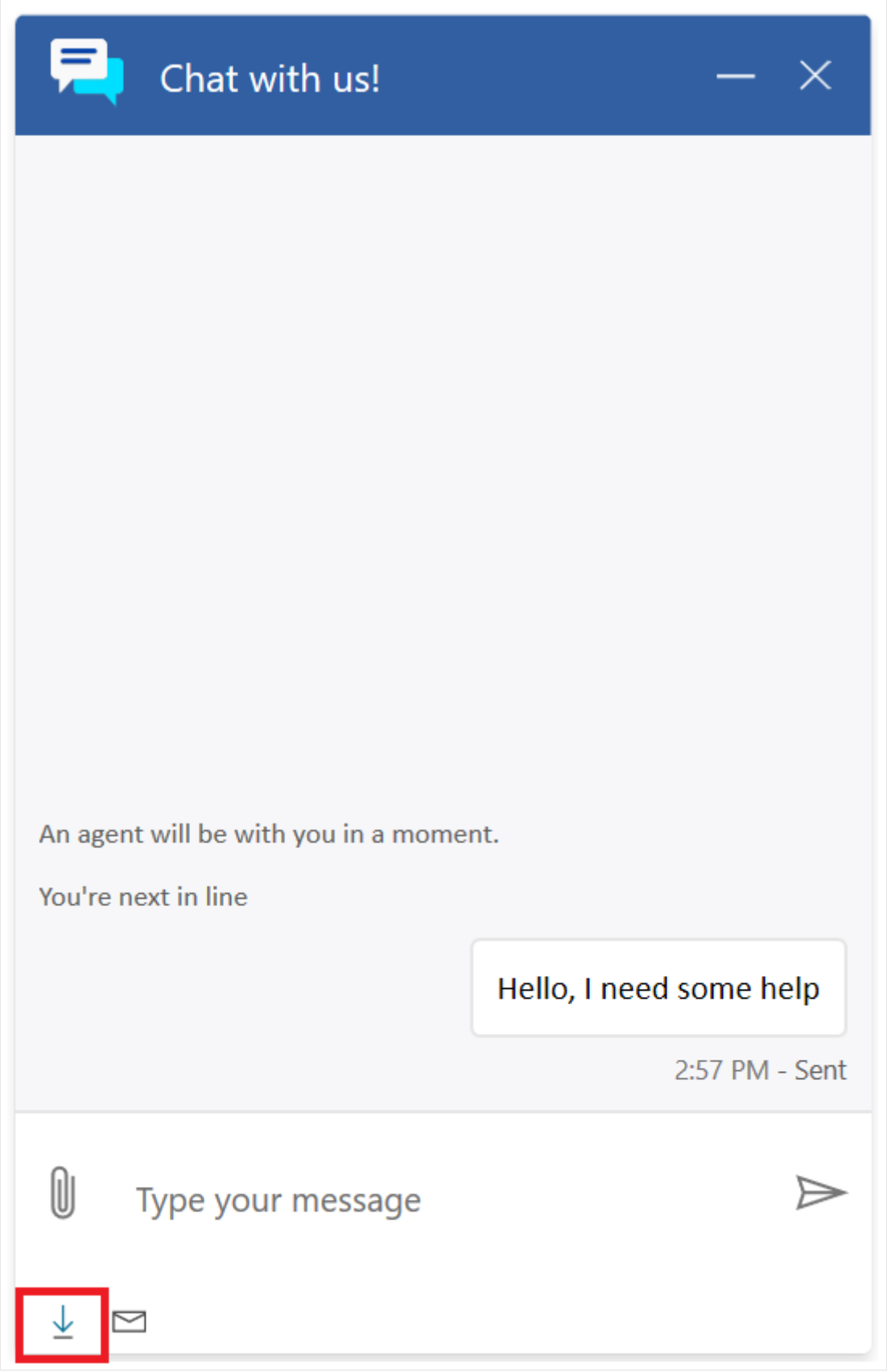
   > ⓘ **Note**
   >
   > Whether an administrator chooses to use the email template provided or create their own, the "{conversation.transcript}" text determines where the transcript is injected into email.



Customer experience

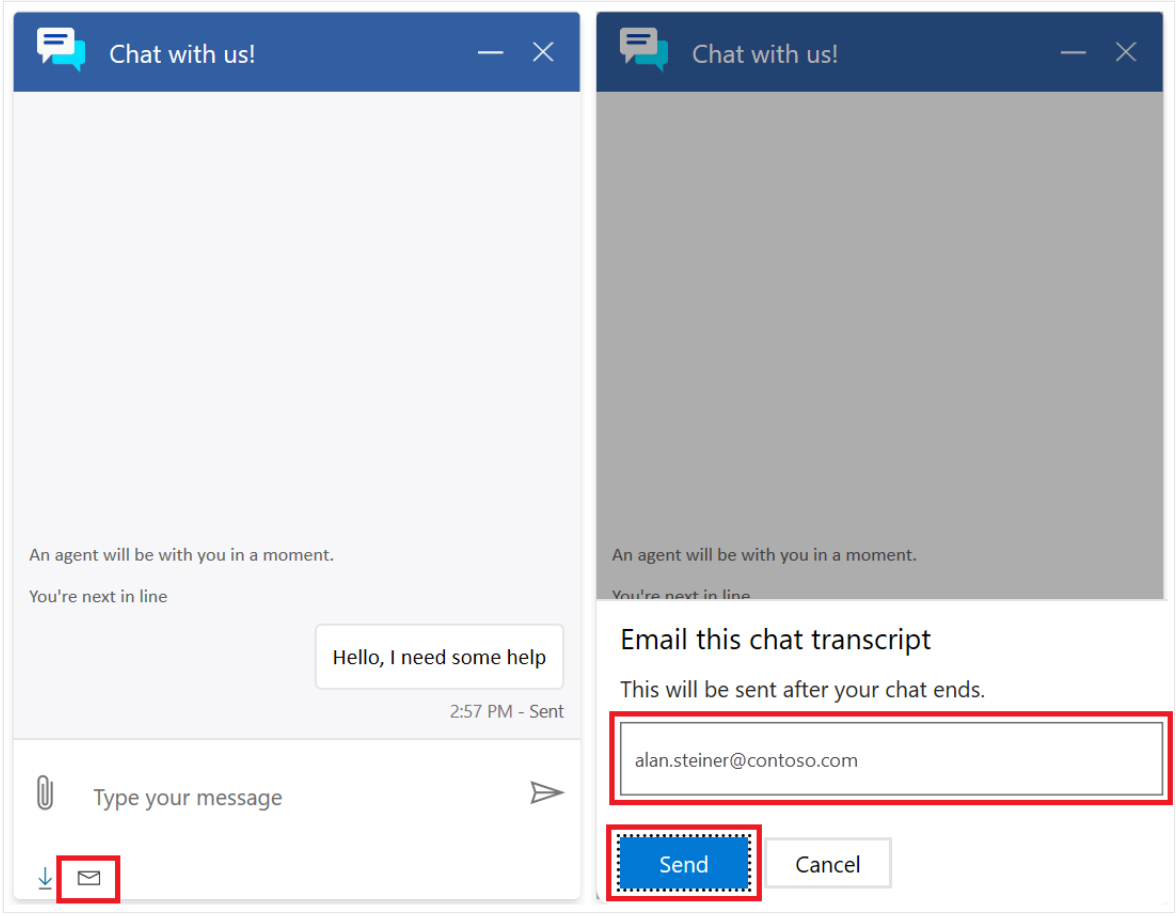
Customers can choose to download and email a copy of their chat transcript conversation from the chat window:

- **Download the chat transcript:** Select the download icon at the bottom of the chat screen.

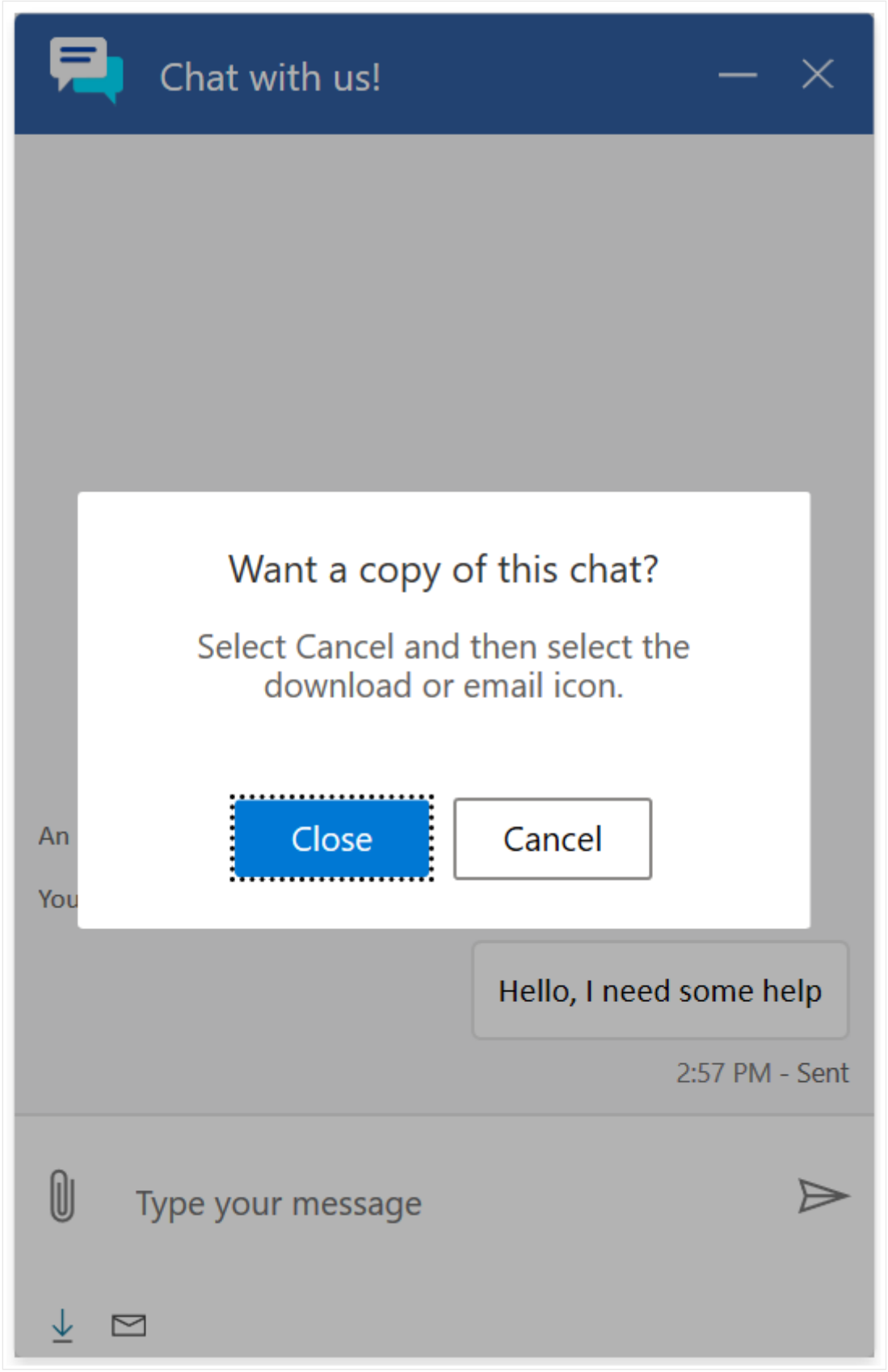


- **Email the chat transcript:** Select the email icon at the bottom of the chat screen.

    1. Enter email address in pop-up window.
    2. Select **Send** to receive a copy of the chat transcript once the conversation ends.



At the end of the chat conversation, the following window appears, reminding the customer they can either download or email a copy of their chat transcript to keep for themselves.



See also

Add a chat widget
Configure a pre-chat survey
Configure agent display name
Configure file attachment capability

Create quick replies

Create and manage operating hours

Create chat authentication settings

Embed chat widget in Power Apps portals

Configure agent display name

Article • 05/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

To protect an agent's privacy, you can configure your chat widget to display either the full name, first name, last name, or nickname of the agent to the customers. If you'd like to hide your agent's identity and anonymize, choose to display the nickname. The values for the names are retrieved from the user record created in Omnichannel for Customer Service. For information on creating users, see Create users in model-driven applications and assign security roles. You can add nickname of a user in the Omnichannel user record in Web Client.

> **Note**
>
> The selected agent's name is displayed in the chat widget only while the agent is chatting with a customer. For consultation or chat transfer, the full name of the agent is used.

1. In Customer Service admin center, go to the workstream of the chat widget in which you need to configure the settings, select edit for the required chat widget, and on the **Chat channel Settings** page, go to the **Chat widget** tab.
2. In the **Agent display name** field, select one of the following options:
   - **Full name:** Full name of the agent.
   - **First name:** First name of the agent. By default, first name is selected.

- **Last name:** Last name of the agent.
- **Nick name:** Nickname of the agent. If a nickname is not available in the user record, the full name is displayed to the customers.

3. Select **Save**.

See also

Configure a pre-chat survey
Configure file attachment capability
Create quick replies
Create and manage operating hours
Create chat authentication settings
Embed chat widget in your website or portal

Configure proactive chat

Article • 04/04/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

A chat channel allows your customers to engage with customer service agents using the chat widget on a website. Proactive chat allows customer service agents to engage with customers by automatically inviting them to a chat conversation based on the configured rules. Proactively engaging with a customer at the time when they need help improves customer experience and satisfaction.

Information about the user journey, time spent on a web page, and more can be used to decide when to engage with a customer. You can control the proactive chat experience by using personalized trigger messages and configurable rules to define the target audience, time frame, and target location.

> **Note**
>
> Proactive chat can be triggered only on pages where the chat widget is embedded.

Enable proactive chat in new admin apps

In Customer Service admin center or Omnichannel admin center, go to the workstream of the chat widget in which you need to configure the settings, select edit for the required chat widget, and on the **Chat widget** tab of the **Chat channel settings** page, set the toggle for **Proactive chat** to **On**.

Enable proactive chat in Omnichannel Administration

1. Sign in to Omnichannel Administration.
2. Open the chat widget for which you need to turn on proactive chat.

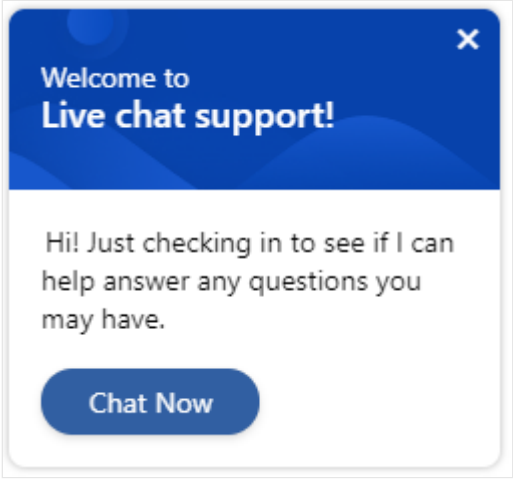
3. Go to the **General settings** tab.
4. Under **Proactive chat**, select **Yes** for **Enable Proactive Chat**. By default, it is set to **No**.

The conditions to trigger the proactive chat are defined in the web page code in which the chat widget is embedded. If the conditions are fulfilled, the proactive chat invitation is displayed with the help of an API.

For example scenarios and sample code, see Start chat proactively.

Customer experience of proactive chat

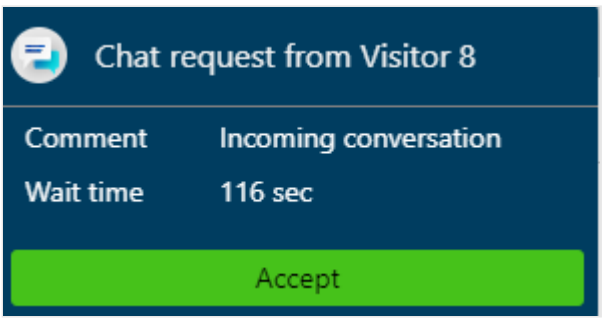
When proactive chat is enabled, the chat invitation is displayed to customers based on the configured triggers.



The customer can accept the chat invitation or close it. If the customer doesn't accept, the chat invitation is closed automatically after a minute. The one-minute timer for automatic closure can't be configured.

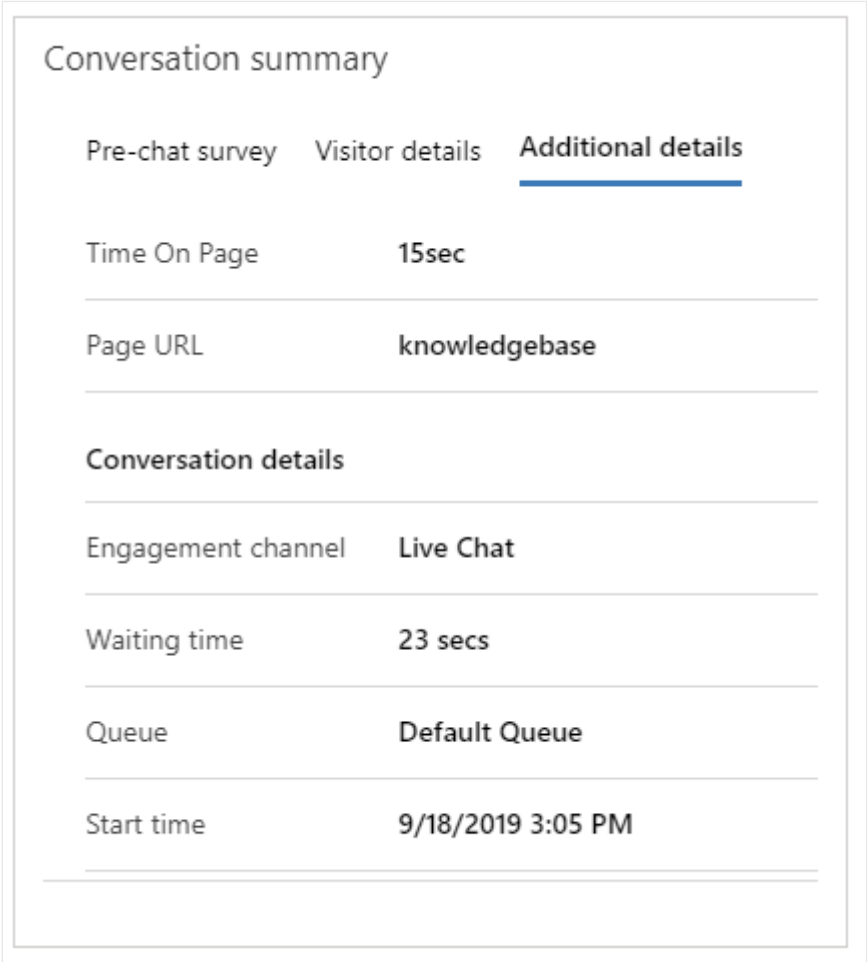
Agent experience of proactive chat

When a customer accepts the proactive chat invitation, an agent receives the notification.



The agent then accepts the chat request and starts conversing with the customer to provide the required help. The **Active Conversation** is loaded and displayed if the customer's details match the stored data.

If your administrator or developer configures the **Additional details** tab and if there are additional context variables, such as time spent on a page and the page URL from where the chat is initiated, they are displayed on the **Additional details** tab.



To learn more, see setContextProvider.

Videos

Proactive chat in Omnichannel for Customer Service

To view more videos on Omnichannel for Customer Service, see Videos.

Configure persistent chat

Article • 08/05/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Persistent chat is an asynchronous mode for the chat channel that allows conversations to happen over multiple sessions. Unlike in live chat, where customers and agents need to be available simultaneously, persistent chat allows users to leave the conversation between sessions and pick it up later.

Live chat and persistent chat share the same channel. If you need to configure both live and persistent chat widgets, create two separate workstreams and update the settings accordingly.

The primary differences between live chat and persistent chat are as follows:

Feature	Persistent chat	Live chat
Agent availability outside of operation hours	Allows customers to reach out to agents outside of working hours. If no agents are available, the conversation will remain open and the agent will receive the customer's messages during the operating hours.	Outside of operating hours, customers might not be able to chat with live agents.
Ending conversations	Customers can't end conversations from their side. Only agents can do it.	Both customers and agents can end the conversation by closing the chat.
Default system messages	Persistent chat doesn't display default messages about average wait time and queue positions, because a customer doesn't need to wait for an agent.	In live chat, the customer receives system messages about wait time. These messages can be overwritten in the **Settings** tab.

How persistent chat works

From the start of a conversation until the agent explicitly ends it, agents and customers will be able to see the history of the conversation in the chat widget. Customers can

close the chat widget and come back after a long time, and still see their history, with the ability to pick up where they left. When a customer is unresponsive for a long time, agents can attend to other conversations by moving their current conversation into a waiting stage, by selecting the ✕ button. Chats in a waiting stage do not take up agent capacity. When the customer comes back to the chat, the agent is notified and the conversation can be picked up and resolved.

Prerequisites

Make sure that the authentication settings are configured. More information: Create chat authentication settings

Set up persistent chat

In Customer Service admin center or Omnichannel admin center, select the **Make chats persistent** checkbox when you create the chat workstream. More information: Create and manage workstreams

Make sure that you set the **Keep same agent for entire conversation** toggle to **Yes** in the **Work distribution** settings of the workstream. More information: Configure work distribution

Set up persistent chat in Omnichannel Administration

> ⓘ **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

You can enable persistent chat in the chat widget settings for a chat channel.

See also

Configure a chat widget
Create and manage workstreams

Configure reconnection to a previous chat session

Article • 01/23/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

When customers are disconnected in the middle of a conversation—for reasons that can range from restarting their system while troubleshooting to network disruption—they can reconnect to the same agent, if you've enabled the settings for reconnection. The options to reconnect to the same agent help save time and effort, and improve customer satisfaction.

How reconnection to a previous chat works

When enabled, reconnection to the disconnected chat session can be initiated by using one of the following options:

- **Reconnect with a link**
  You can configure link information as a quick response for agents. If the agent anticipates that there will likely be a need to reconnect during a conversation, the agent shares the reconnection link with the customer. This option is available for both authenticated and unauthenticated chat widget settings. To configure the link, see Slug for reconnection link.

- **Reconnect through a prompt**
  Customers interacting through chat widgets that have authentication settings configured are presented with the option to continue with the previous session or start a new conversation when they come back to the chat session.

Additionally, you can cater to the timeout scenario by setting the following option:

- **Redirection link**
  You can optionally configure a redirection link for the customer to navigate to when they come back after a timeout period that is configured in the reconnection

settings. If no redirection link is configured, a fresh conversation will start when the customer selects the reconnect link.

> **Important**
>
> The reconnection feature works as designed only when the following prerequisites are met for the conversation:
>
> - The customer connected again within the reconnection time that's configured for the feature.
> - The agent didn't end the session by using the **End** button.
> - The customer didn't end the session by closing the chat window.
> - If the agent closed the chat window, the customer might not be reconnected to the same agent.

Enable reconnection to a previous chat session

You can enable the reconnection options in the chat widget either while setting up the chat widget for the first time, or later, based on your needs.

To enable reconnection to a previous chat session

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

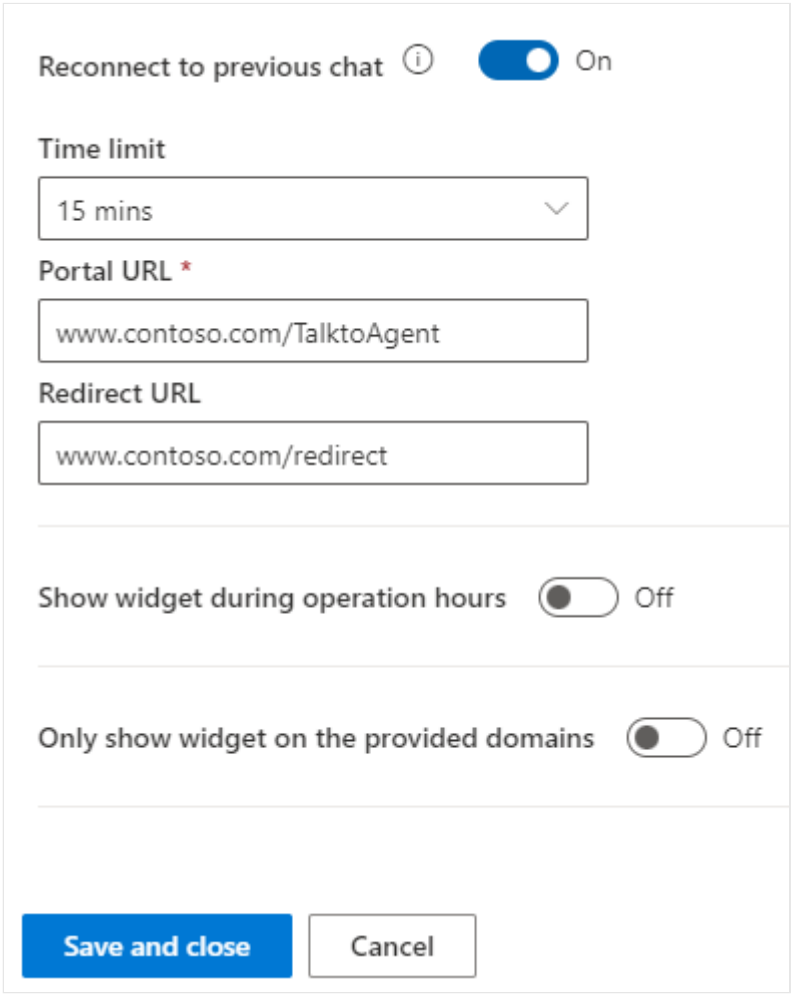
   - In the site map, select **Workstreams** in **Customer support**.

2. On the **Workstreams** page, select the workstream.
3. Select the chat widget for which you want to enable the reconnection option.
4. On the <***widget_name***> **Chat Widget** page, in the **Chat widget** area, select **Edit**.
5. On the Chat channel settings dialog, go to the **Chat widget** tab and set the **Reconnect to previous chat** toggle to **Yes**. The following options are displayed:

   - **Time limit**: Select a value to indicate the time within which the customer can connect back to the same agent. The agent's capacity is blocked for the specified duration unless the agent closes the session. If the customer fails to reconnect within the duration the conversation moves to the **Wrap-up** state.

- **Portal URL**: Specify the link that will be shared by the agent with the customer to reconnect to the chat session. This must be the portal link on which the chat widget is displayed.
- **Redirect URL**: Optionally, specify the link that the customer will be redirected to when the reconnect timeout occurs. If this is left blank, the customer will see the option to start a new chat conversation.

6. Select **Save and Close**.



See also

Add a chat widget
Create a work stream
Slug for reconnection link
Understand conversation states
Understand disconnected chats

Understand disconnected chats

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

During live chat, a customer can no longer chat with the agent if they leave the conversation or stay disconnected for more than three minutes. When a customer is disconnected for more than three minutes, Omnichannel for Customer Service detects the disconnection, and automatically updates the conversation state of the chat.

When an ongoing chat gets disconnected, Omnichannel for Customer Service:

- Moves the chat from an **Open** to **Closed** state, so the agent knows that there's no customer to respond to.
- Moves the chat from an **Active** to **Wrap-up** state, and updates agent capacity, so the agent knows that the customer isn't available. You can configure agent capacity for the wrap-up state in the work distribution settings of the workstream. More information: Wrap-up state and Configure work distribution
- Record an automated message in the transcript to indicate that the customer has disconnected. More information: Configure automated messages

What happens when a chat gets disconnected

Chat widgets are connected to browsers via a web socket connection. The connectivity can be lost for reasons like:

- The customer closed the browser but didn't close the chat widget at the end of the conversation.
- The customer navigated away from or closed the browser tab or app during the conversation. In some mobile devices, locking the screen or switching apps can also disconnect the chat.
- The customer lost internet connectivity, or had a network or system issue.

In such situations, if the customer returns to the chat within three minutes, then they can continue the conversation.

If the customer reopens the chat widget after three minutes of disconnection, a new chat will begin. However, you can help your customers connect back to the previous chat by enabling reconnection. More information: Configure reconnection to a previous chat session

> **Note**
>
> A delay in sending messages doesn't affect your chat connection.

Next steps

Understand conversation states
Configure automatic closure of conversations

See also

View communication panel

Understand conversation states

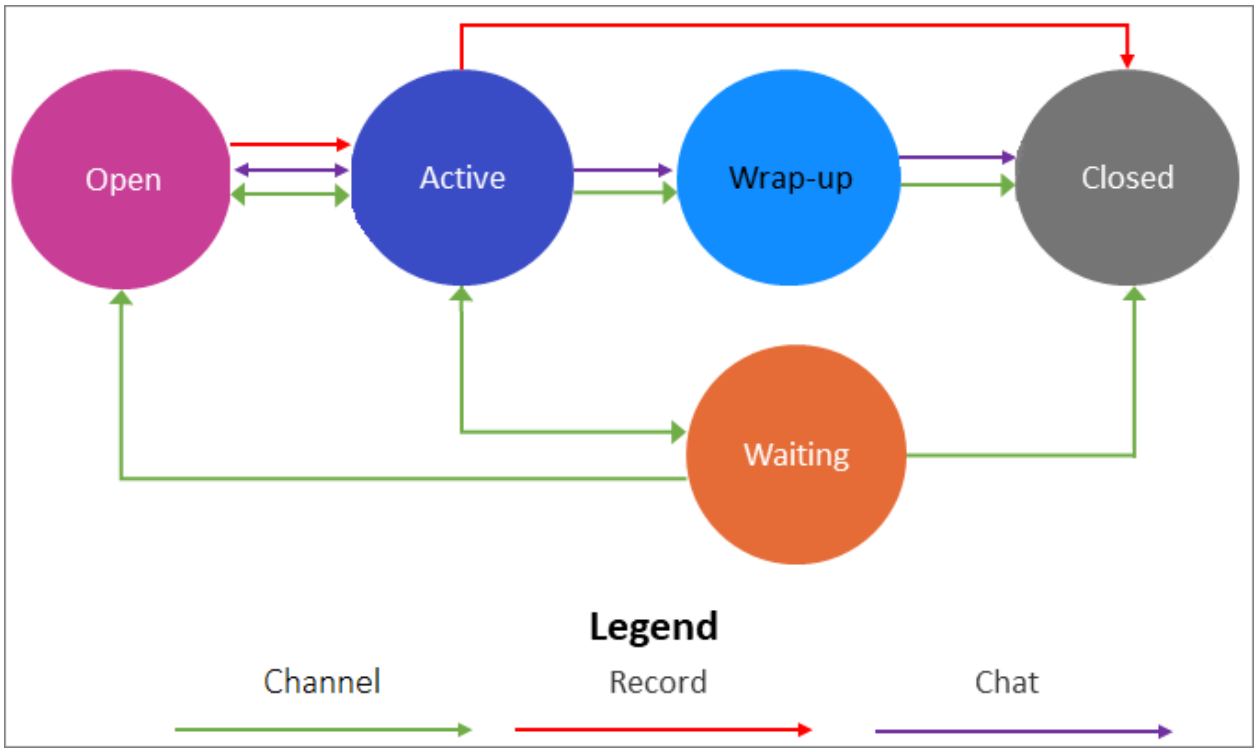
Article • 09/29/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article explains the various states and status reasons of the conversation (work item) in Omnichannel for Customer Service.

The conversation can be in an open or closed state, and can have the following status reasons:

- Open
- Active
- Waiting
- Wrap-up
- Closed



Channel refers to SMS, voice, social, and Microsoft Teams channels supported in Omnichannel for Customer Service.

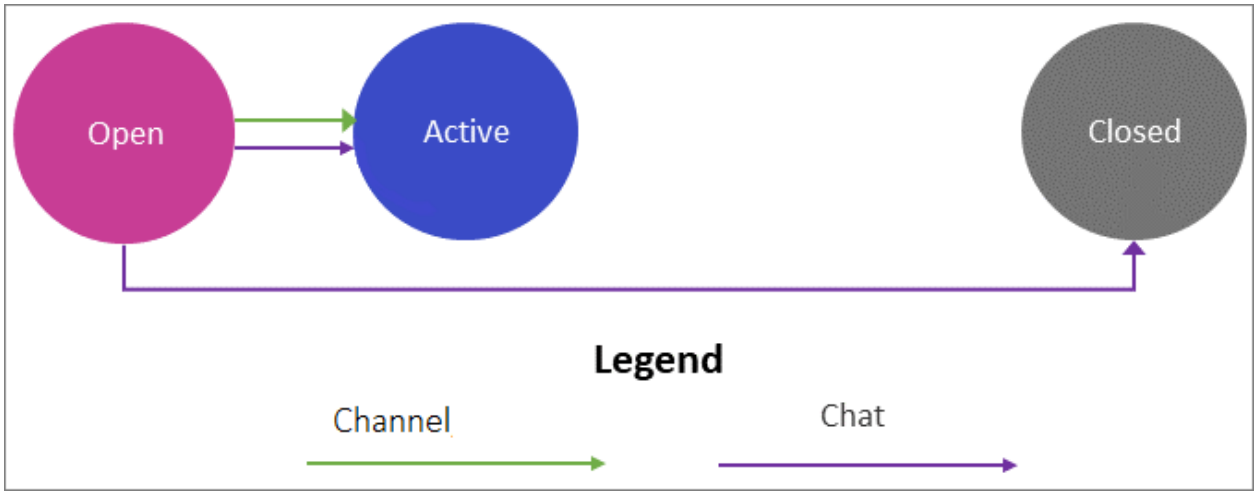
> **Note**
>
> Additionally, the conversation might have the resolved or scheduled status reason, which is for internal use only.

Open

The conversation (work item) that is in the queue and not assigned to the agent is classified under **Open** state.

The conversation (work item) transitions from **Open** to **Active** or **Closed** under the following scenarios.

From status reason	To status reason	Scenario	Type
Open	Active	When an agent picks the conversation from the **Open work items** stream. When the routing and work distribution feature pushes (assigns) the conversation to the agent.	Channel Chat
Open	Closed	When the customer disconnects or ends the chat before the conversation is assigned to the agent. More information: Understand disconnected chats	Chat

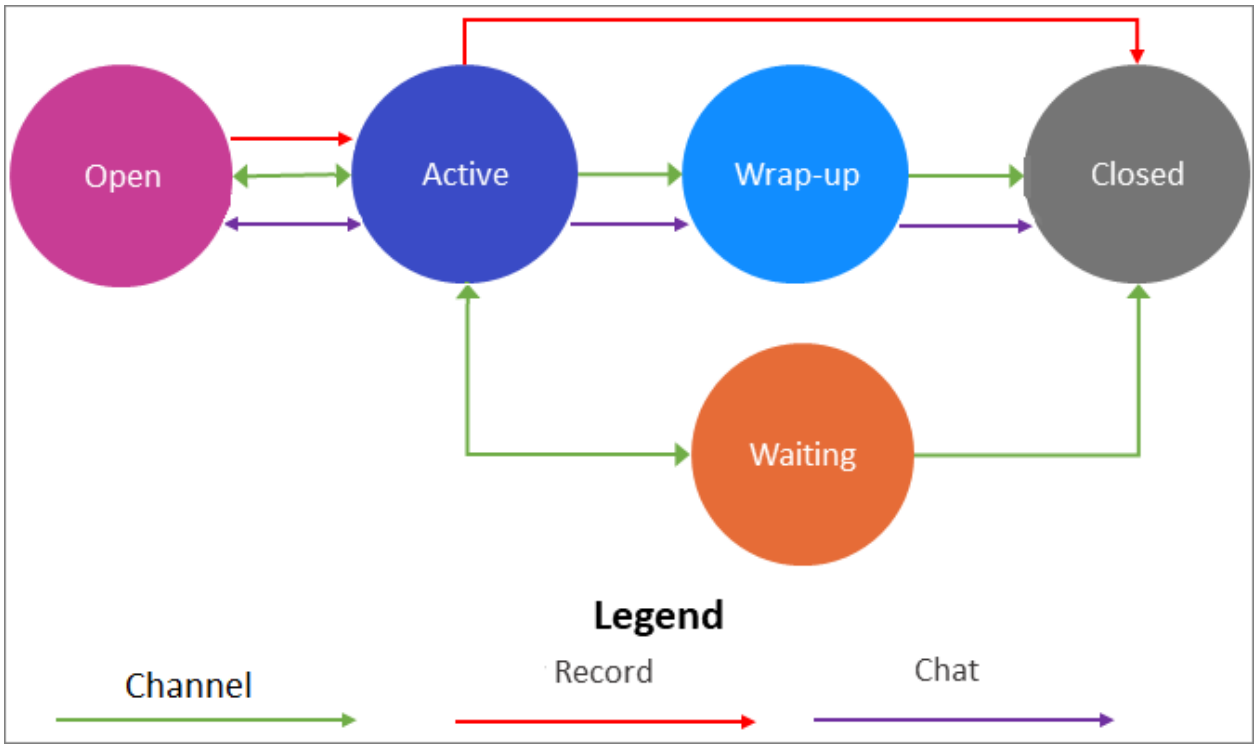


Active

The conversation that an agent picks or is assigned to the agent is classified under **Active**. In **Active**, the agent capacity is consumed.

The conversation (work item) transitions from **Active** to **Closed**, **Open**, **Waiting**, or **Wrap-up** under the following scenarios.

From status reason	To status reason	Scenario	Type
Active	Wrap-up	When an agent selects the **End** button on communication panel during the conversation with the customer. When customer ends the conversation by selecting the **End** button on the portal chat widget (only for a chat channel). When the customer is disconnected from the conversation (applicable only to Live chat channel).	Channel Chat
Active	Open	When an agent disconnects the conversation and don't reconnect within a specified timeout period. When an agent releases the conversation to the queue. When an agent transfers the conversation to another queue. When an agent closes the session while the conversation is active (applicable only to Live chat channel).	Channel Chat
Active	Waiting	When an agent closes the session (not ending the conversation by selecting the **End** button) while the conversation is active.	Channel The status change isn't applicable to Live chat.
Active	Closed	When an agent resolves the case (or get a record to non-active state) and closes the session.	Record

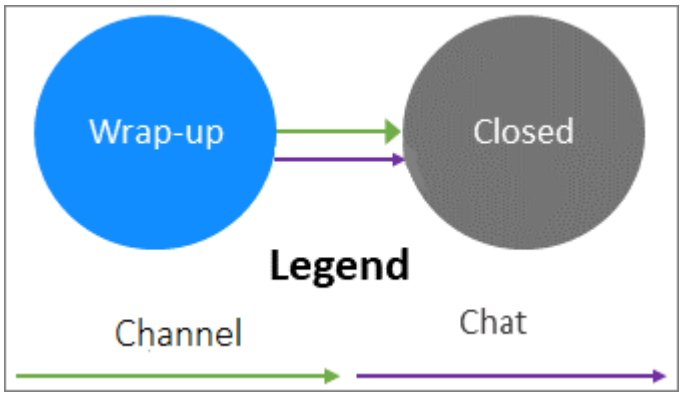


Wrap-up

This is an intermediate state after the agent ends the conversation, and does post-conversation activities such as taking notes and updating the customer information, before moving the conversation to the **Closed** state. In the **Wrap-up** state, the agent capacity is blocked according to the duration that the agent selects in the **Block capacity for wrap up** field in the workstream. If the agent selects **Always block**, their capacity is blocked as long as the conversation is in the **Wrap-up** state. If the **Don't block** setting is selected, the agent capacity is released as soon as conversation moves from **Active** to **Wrap-up** state. The agent might also select a duration ranging from 1 to 60 minutes. More information: Configure work distribution

The conversation (work item) transitions from **Wrap-up** to **Closed** under the following scenario.

From status reason	To status reason	Scenario	Type
Wrap-up	Closed	When the agent selects the **End** button in communication panel and closes the session.	Channel Chat



> ⓘ Note
>
> When a live chat conversation gets disconnected, Omnichannel for Customer Service will automatically move **Active** conversations to the **Wrap-up** state. More information: **Understand disconnected chats**

Waiting

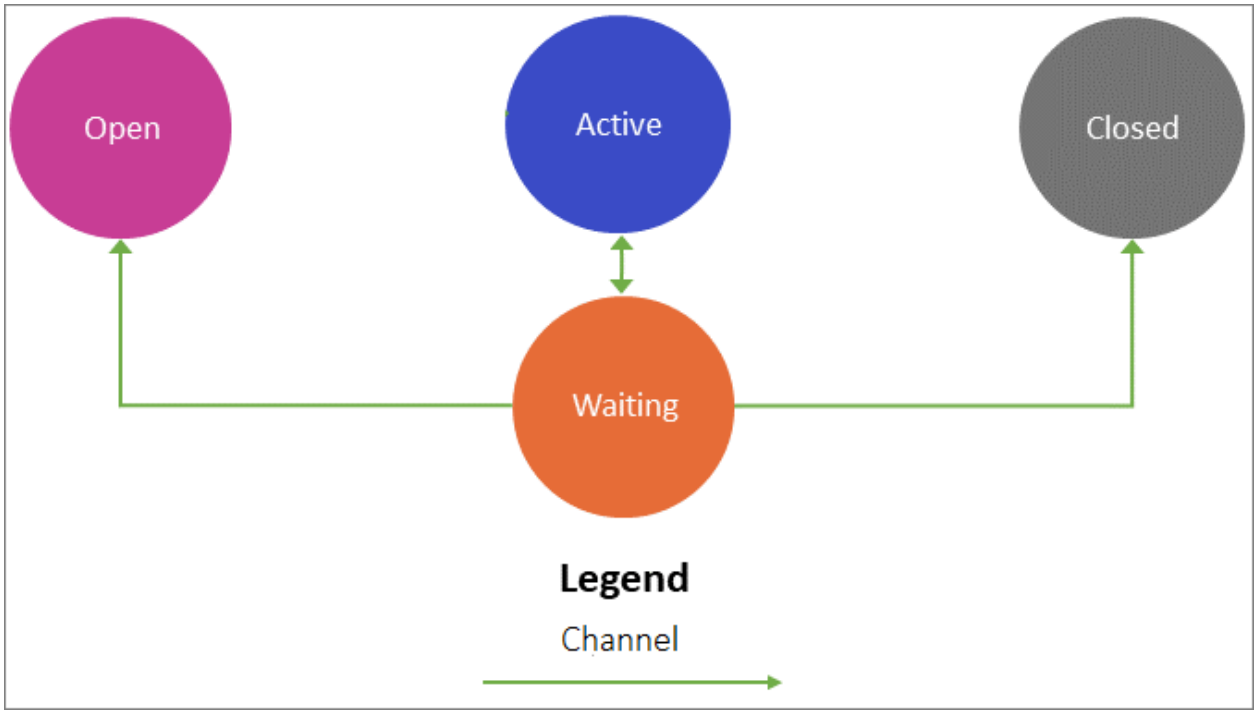
> ⓘ Note
>
> Waiting state applies only to asynchronous and persistent chats, and not live chats.

A conversation in waiting doesn't block their capacity. The conversation gets transitioned to waiting when the agent closes the session without ending the conversation (that is, without selecting the **End** button on the communication panel) or when the customer closes the browser window without closing the chat widget. For example, the agent is waiting for some information from customer and don't want to end the conversation or the customer's browser closes unexpectedly.

The conversation (work item) transitions from **Waiting** to **Closed**, **Active**, or **Open** under the following scenarios.

From status reason	To status reason	Scenario	Type
Waiting	Closed	When there's no activity on this conversation from either customer or agent, within inactivity timeout period.	Channel
Waiting	Active	When an agent revives the session from the **My work items** stream on **Omnichannel Agent Dashboard**.	Channel
Waiting	Open	When the customer revives the conversation within a specified timeout period while the session is still active in	Channel

From status reason	To status reason	Scenario	Type
		the browser.	



Closed

The conversations that are completed by ending them or closing the session are classified as **Closed** conversations. Agents can't reactivate or reopen closed conversations.

See also

View communication panel
Configure automatic closure of conversations
Configure automatic closure of conversations using Power Apps

Show customers their position in a queue

Article • 04/25/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As an administrator, you can turn on the feature that notifies a customer of their position in the queue and the average wait time when they're waiting to chat with an agent. You can help set customer expectations when wait times are longer due to higher volumes of customers needing support, understaffing, or longer-than-expected handle times (for example, new issues or new agents). Knowing their queue position can help the customer decide whether to wait in the queue or come back later.

When this feature is turned on, a customer who submits a request when other customers already are waiting is placed in the queue and notified with the following message: **People ahead of you: <n>.**

The number of customers waiting to chat gets updated each time a customer in line is served. When no other customer is ahead in the queue, the customer waiting is notified with the message: **You're next in line....**

> **Note**
>
> - The queue position is shown only when there is a queue of customers waiting (for example, when no agents are currently available).
> - In a scenario where a customer is waiting in the queue and another customer who has been waiting longer is transferred over by an agent, the customer who has been waiting longer is served first, and the other customer does not see a position change in the queue.
> - If skill-based routing is configured with exact skill match, the queue position that is displayed to a customer on the chat portal widget might not be accurate; therefore, the assignment of an agent to the customer might take longer than expected.

- The queue position isn't supported for persistent chats. More information: **Configure persistent chat**

Enable queue position setting

To configure the queue position setting:

1. Sign in Customer Service admin center, and then go to the workstream of the chat widget for which you want to configure the queue setting.
2. Select **Edit** for the required chat widget, and on the **Chat channel Settings** page, go to the **Behaviors** tab.
3. Enable the **Customer wait time** toggle and select the checkboxes to show customers their position in the queue and the average wait time when they're waiting to interact with an agent.
4. Select **Save and Close**.

See also

Show customers their average wait time in a queue
Add a chat widget
Configure a pre-chat survey
Configure agent display name
Create quick replies
Create and manage operating hours
Create chat authentication settings
Embed chat widget in Power Apps portals

Show customers their average wait time in a queue

Article • 04/04/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Overview

As an administrator, you can enable the feature that displays a customer's average wait time in the queue to start a chat with an agent. It helps set customer expectations when wait times are long because of a high volume of customers needing support, understaffing, or long call-handling times. When you display the average wait time to the customer, the customer can decide whether to wait in the queue or return to the chat later.

With this feature turned on, when customers are placed in the queue, they'll receive the notification: **Average wait time <n> mins.**

The average wait time is calculated based on wait times from the previous 48 hours and a minimum of 50 conversations for the specific queue. This is an estimated time, and doesn't change for the customer. The average wait time is displayed only if the wait is one minute or longer. When there's no wait, the average wait time isn't displayed.

> **Note**
>
> If skill-based routing is configured with exact skill match, the queue position that's displayed to a customer on the chat portal widget might not be accurate; therefore, the assignment of an agent to the customer might take longer than expected.

Enable average wait time

If you're using Customer Service admin center or Omnichannel admin center, follow these steps:

1. Go to the workstream of the chat widget in which you need to configure the settings, select edit for the required chat widget, and on the **Chat channel Settings** page, go to the **Behaviors** tab.
2. Select **Customer wait time** if you want to show to customers their position in the queue and the average wait time when they're waiting to interact with an agent.
3. Select **Save and Close**.

If you're using Omnichannel Administration, follow these steps:

1. Go to **Channels** > **Chat**, and open the chat widget in which you need to configure the settings.
2. Select the **General settings** tab.
3. In the **Customer waiting** area, change **Show average wait time** to **Yes**. By default, it's set to **No**.
4. Select **Save**.

See also

Show customers their position in a queue
Overview of skill-based routing
Add a chat widget
Configure a pre-chat survey
Configure agent display name
Create quick replies
Create and manage operating hours
Create chat authentication settings
Embed chat widget in Power Apps portals

Delete a configured channel

Article • 05/27/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can delete an instance of a configured channel or SMS number in scenarios such as when it isn't required, you don't want to receive messages on it, or the settings are corrupted.

Delete a configured channel

You can delete a channel instance in Customer Service admin center, Omnichannel admin center, or Omnichannel Administration.

1. Select a messaging channel such as Facebook.
2. On the page toolbar, select **Delete**.
3. On the confirmation dialog that appears, confirm the deletion.

If you want to reconfigure your social channel or SMS number in Omnichannel for Customer Service, follow the channel-specific instructions.

Delete a Facebook page

If you no longer want to receive messages on a Facebook page that you've configured for your Facebook channel in Omnichannel for Customer Service, you can go to the page and delete it.

1. In Omnichannel Administration, in the left pane under **Channels**, select **Facebook**.
2. Select the channel that contains the page you want to delete. The <***Channel_name***> **Facebook Application** page appears.
3. In the **Facebook Pages** area, do one of the following:

- Use **More Commands** to the right of the list to delete the required Facebook page.
- Select the required Facebook page, and then select **Delete** on the page that appears.

See also

Channels in Omnichannel for Customer Service
Delete solutions

Manage enhanced Active Conversation settings

Article • 09/25/2023

The enhanced Active Conversation experience displays the customer and case details that are relevant to your business. When you enable the **Enhanced active conversation form** option, the **Customer 360**, **Case details**, and **Recent cases** components are available on the **Active Conversation** form by default. You can further customize these components in Power Apps.

- **Customer details**: Use the **Customer 360** component in **Account** > **Account form for Conversation Customer Card** form or **Contact** > **Contact form for Conversation Customer Card** to customize the details displayed on **Customer details**.
- **Case details**: Use the **Customer 360** component in **Case** > **Case for Customer Card** form to customize the details displayed on **Case details**.
- You can also set the required view to display case details in the **Issue Snapshot**. By default, the **Default view** is set to **Case Lookup View**.

More information: Configure components to display customer details and recent records.

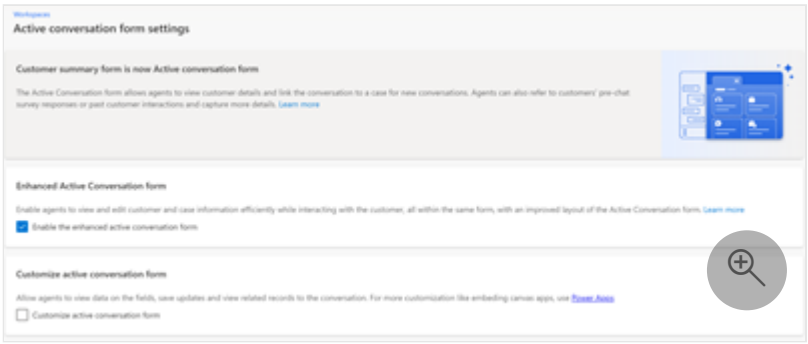
Manage Active Conversation form settings

To enable the enhanced Active Conversation form and customize the form, perform the following steps:

1. In Customer Service admin center, go to **Workspaces**.
2. Select **Manage** for **Active conversation form settings** in **Workspaces**.
3. Select the following options:
    - **Enhanced active conversation form** to enable the enhanced Active Conversation experience. The following features are available as a part of the enhanced experience:
        - Configurable **Customer 360** and **Case details** card with inline edit capabilities.
        - **Recent cases** card with color coded priority and status fields.
        - The default form selector to switch between active and closed conversations is hidden.

- **Customize active conversation form** to display **Queue**, **Start time**, options to save and refresh on the **Active Conversation** form, and enable customizations in Customizations supported by the Conversation form. Select **Power Apps** to further customize the form. If you're customizing the form in Power Apps, we recommend the following guidelines:
  - Reduce the number of custom controls. Keep only the most frequently used controls on the default tab. The remaining data-driven controls should be distributed into secondary tabs to allow the default tab to load quickly.
  - Limit the amount of customizations using the form Onload event.
  - Limit the amount of external data coming from Canvas apps for efficient and productive forms. More information: Design forms for performance in model-driven apps

> **Note**
>
> When **Customize active conversation form** is enabled:
>
> - If an agent initiates an outbound call to emergency services, the active conversation form doesn't display the **Save** and **Refresh** options.
> - If an agent initiates a consult with other agents who are from a different business unit and don't have the read permissions at the organization level for the conversation entity, they won't have access to the conversation.



Display the form selector on Active Conversation form

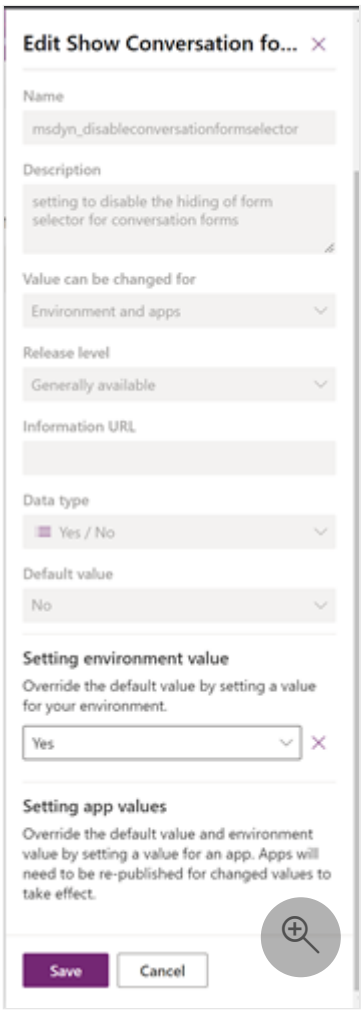
By default, the enhanced **Active Conversation** form doesn't display the form selector to switch between open and closed conversations. To allow your users to toggle between open and closed conversations, perform the following steps:

1. In Power Apps, add the **Show Conversation form selector** setting definition. More information: Add an existing setting definition

2. In the **Edit Show Conversation form selector**, set the **Setting environment value** option to **Yes**. More information: Update a setting definition

3. Optionally, in the **Setting app values** section, for a required app, you can set the value to **Yes** in the **New app value**. The tab set at the application level overrides the environment level setting.

4. Save and publish your customizations.



Customize recent cases

If you set the **Enhanced Active conversation form** toggle to **Yes**, the enhanced **Recent cases** control is available on the **Active Conversation** form, out of the box. If you've set the default view to a custom view in the legacy recent cases control, when you switch to the enhanced experience, your custom views aren't set as the default view automatically. You must set the default view to your required custom view in Power Apps.

To add your custom view as the default view and customize the form further, perform the following steps:

1. In Power Apps, select the environment that contains your solution.
2. Select **Tables**, select **Conversation**, and then select the **Active Conversation** form.
3. Select **Recent cases** on the **Form** area.
4. Perform the following actions in **Properties**:

    - Specify the **Table**. The card displays records from this table.
    - Select the **Default view** to your required custom view.

Disable enhanced customer details, case details, or recent cases

You can choose to display the default **Customer profile**, **Issue snapshot**, or **Recent cases** cards on the enhanced **Active Conversation** form even when **Enhanced active conversation form** is enabled.

The following options are available out of the box in Power Apps:

Option	Description
Disable Customer 360 card for Open Conversation	Set this option to **Yes** to display the default **Customer profile** card.
Disable Linked Case card for Open Conversation	Set this option to **Yes**, to display the default **Issue Snapshot** card.
Disable the recent cases control for Open conversation	Set this option to **Yes**, to display the default **Recent cases** card.

Perform the following steps to revert to the required default experience:

1. In Power Apps, select the environment that contains your solution.
2. Select **Solutions**, and then select the required solution.
3. Select **Add Existing** > **More** > **Setting**.
4. On the **Add existing Setting Definition** pane, select the required option.
5. Select **Add**.
6. Go to **Add Existing** > **App** > **Model-driven app**> **Add existing model-driven apps** pane.
7. On the edit pane for the required option, set **Setting environment value** to **Yes**.
8. Optionally, select **New app value** for the app. For a specified app, the value set at the application level overrides the environment level setting.

9. Select **Publish All Customizations**.

See also

View customer information on Active Conversation form

Get started with Customer Service workspace

Agents using Omnichannel for Customer Service app

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Overview

The Omnichannel for Customer Service application on a web browser provides a unified and consistent single-view experience for the agents to view conversation details, Customer information, and access Line-of-Business applications from within the Omnichannel for Customer Service app. As an agent, you can use the app to manage the work items assigned, simultaneous customer sessions without losing the context of each session. You view the holistic data of the customer with the details of their previous interaction, which ensures you have all the available information to resolve the customer issue.

> **Note**
>
> - The omnichannel provisioning provides the Omnichannel for Customer Service app and is available to the users working with Chat for Dynamics and SMS.
> - As of now, administrators or system cutomizers can't integrate third-party channels with Omnichannel for Customer Service app.
> - Omnichannel for Customer Service uses third-party cookies for authentication. Make sure that the cookies are not blocked in your browser in any mode so that certain services, such as agent or supervisor presence, can work properly.

In this section

Use the resources in the following sections to learn how to use Omnichannel for Customer Service.

- Sign in to Omnichannel for Customer Service
- Introduction to the agent interface
- Manage sessions
- Manage applications
- View agent dashboard and conversations (work items))
- Understand conversation states
- Monitor real-time customer sentiment
- View notifications
- View customer information on Active Conversation form
- Search for and share knowledge articles
- View conversation and session activity types in the model-driven apps

How-tos

- View communication panel
- View active conversations for an incoming conversation request
- Create a record
- Search, link, and unlink a record
- Manage presence status
- Take notes specific to conversation

Sign in to Omnichannel for Customer Service

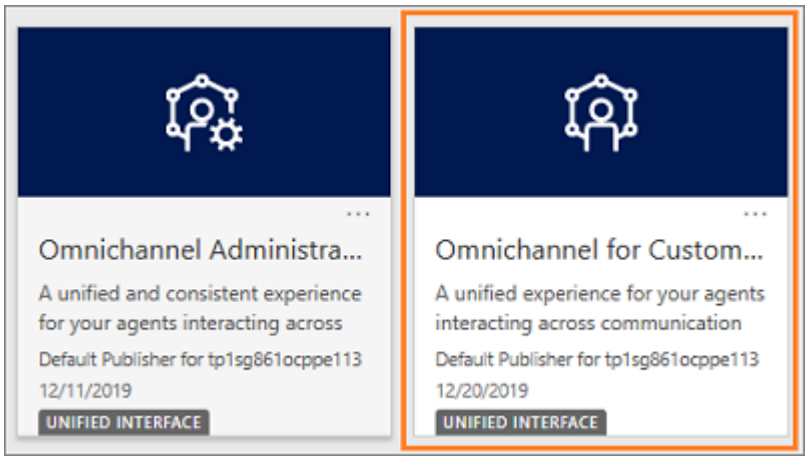
Article • 08/19/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Sign in to Omnichannel for Customer Service

To sign in to Omnichannel for Customer Service, do the following:

1. Go to `https://<orgURL>.dynamics.com/apps`.
2. Enter your username and password. The apps page appears.
3. Select the **Omnichannel for Customer Service** app.



> **Note**
>
> If you have Omnichannel access, then you can see the Omnichannel for Customer Service app in your instance.

See also

- Introduction to the agent interface

- View communication panel
- Manage presence status

Introduction to the agent interface of Omnichannel for Customer Service

Article • 08/19/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The Omnichannel for Customer Service app for Dynamics enables organizations to instantly connect and engage with their customers via channels like Chat for Dynamics 365 Customer Service and SMS. The app provides context rich multitasking experience across different customer sessions.

Value propositions of Omnichannel for Customer Service app

- **Unified experience:** The app provides unified and consistent single-view experience for the agents to view conversation details, Customer information, and access Line-of-Business applications from within the Omnichannel for Customer Service app.
- **Multiple session and application management:** The app enables agents to handle multiple sessions and manage contextual applications (app tab panel) related to the sessions with ease, which in turn leads to less errors, faster case resolution, and customer satisfaction.
- **Deployment and upgrade:** The app is available as a web application (thin client), which makes the maintenance easy and the upgrades are seamless.
- **Extensibility:** The app is built on the Unified Interface framework, which makes easy for the developers and system customizers to customize and extend the app.

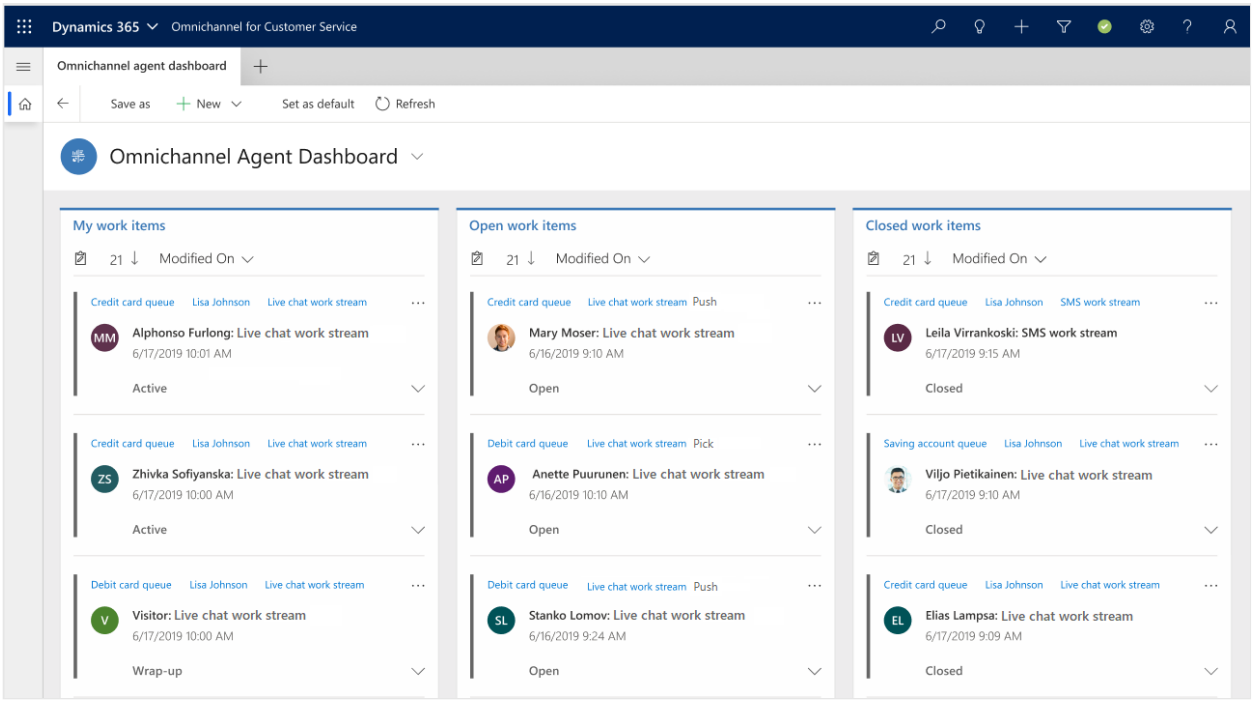
High-level feature capabilities for the agents

As an agent, you might engage with several customers simultaneously across different channels but managing all the customer sessions is a challenge, especially switching

between the sessions while understanding the context of the engagement. Omnichannel for Customer Service provides a consistent experience regardless of the support channel and organizations can maximize agent productivity.

Omnichannel for Customer Service provides the following key capabilities:

- Agent dashboard
- Multiple sessions
- Application tabs associated with sessions
- Active Conversation
- Communication panel
- Presence management
- Notifications
- Consult with agents and/or supervisors
- Transfer conversation to another agent or queue
- Capture notes specific to the conversation

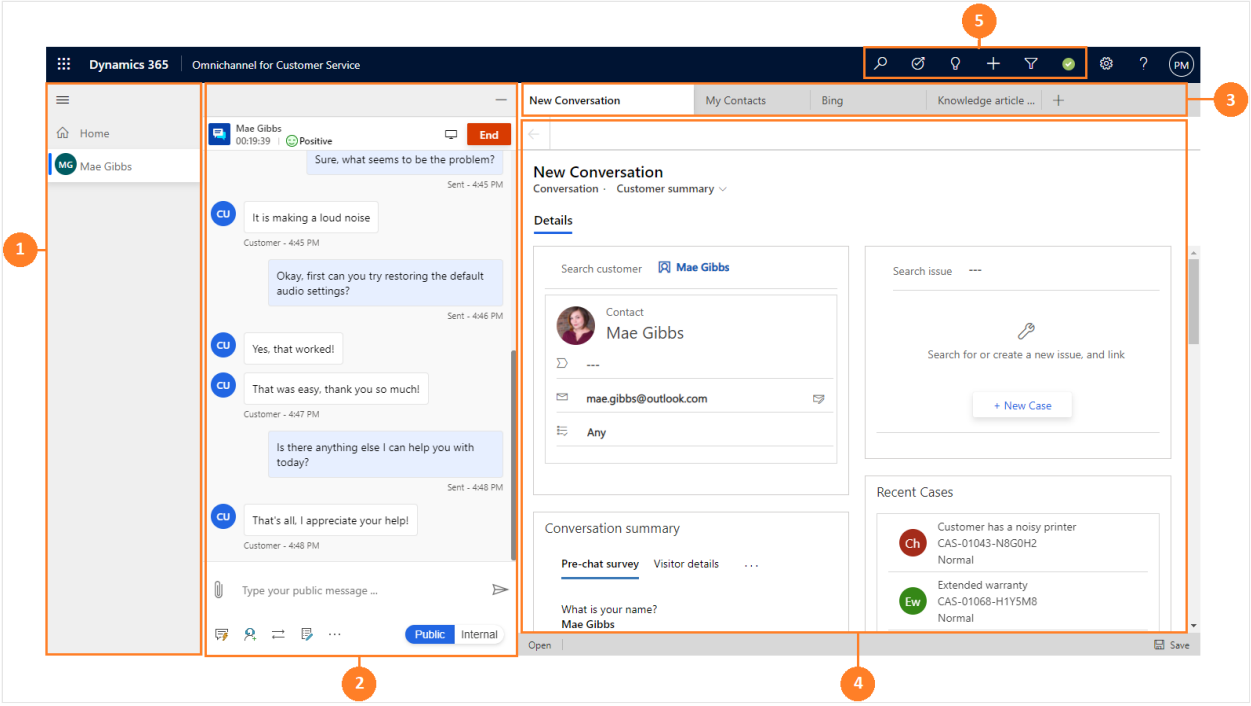


Components in the agent interface

When you start a chat session in Omnichannel for Customer Service, the agent interface has the following components:

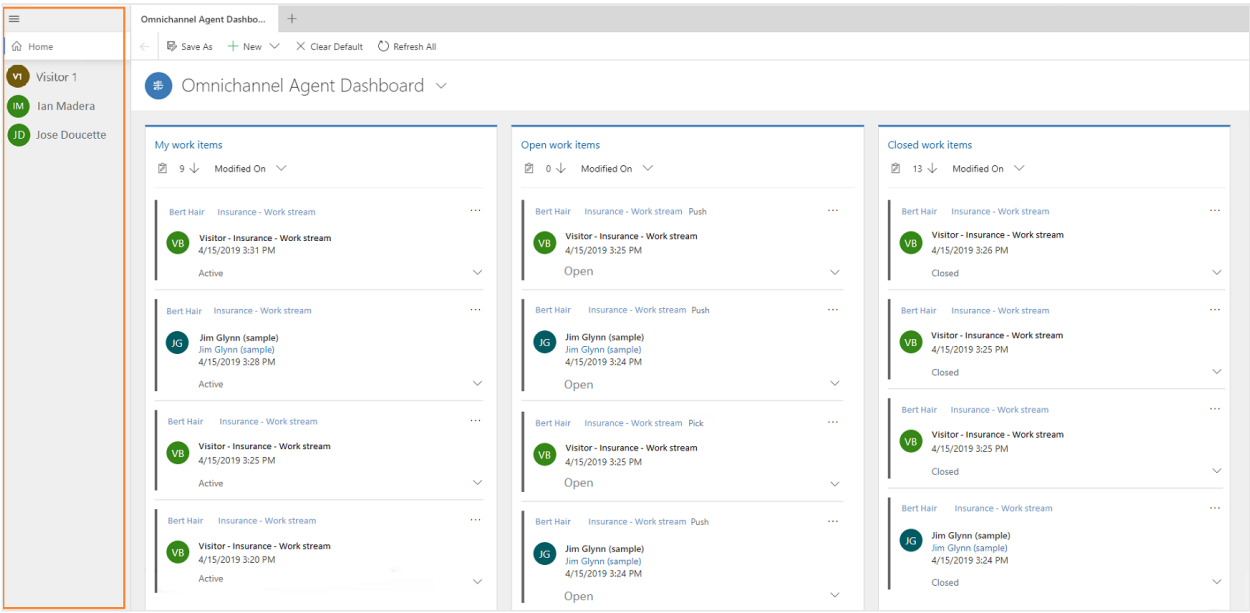
- Session panel
- Communication panel
- Application tab panel

- Unified Interface application area
- Search, quick create, and presence



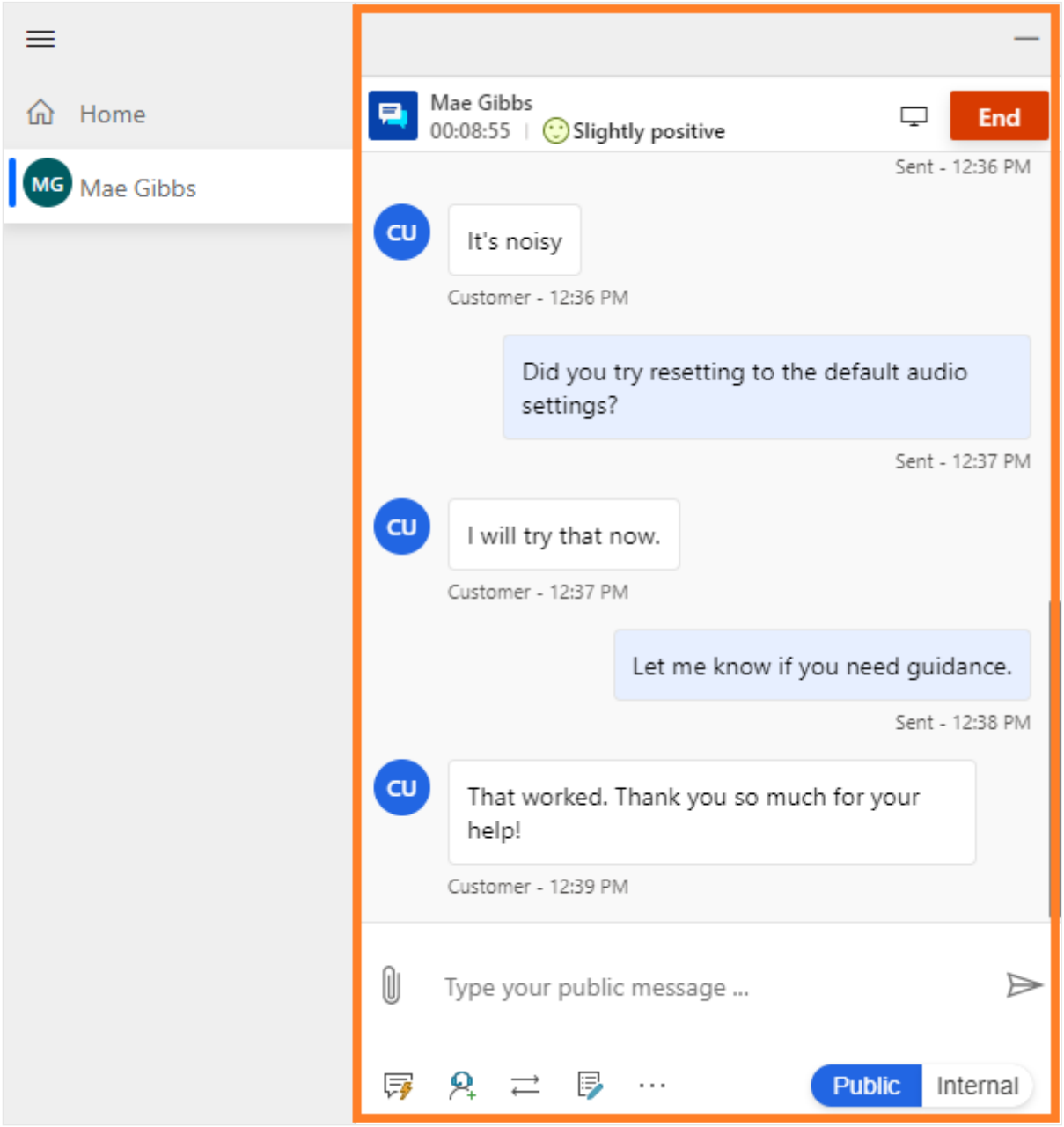
Session panel

The vertical panel on the left side is the session panel that allows you (the agent) to work on multiple customer sessions simultaneously. In addition, as an agent you can switch between sessions without losing context of the conversation and customer details. The ability to handle multiple sessions simultaneously (while preserving customer context) allows you to resolve issues faster and achieve higher productivity.



Communication panel

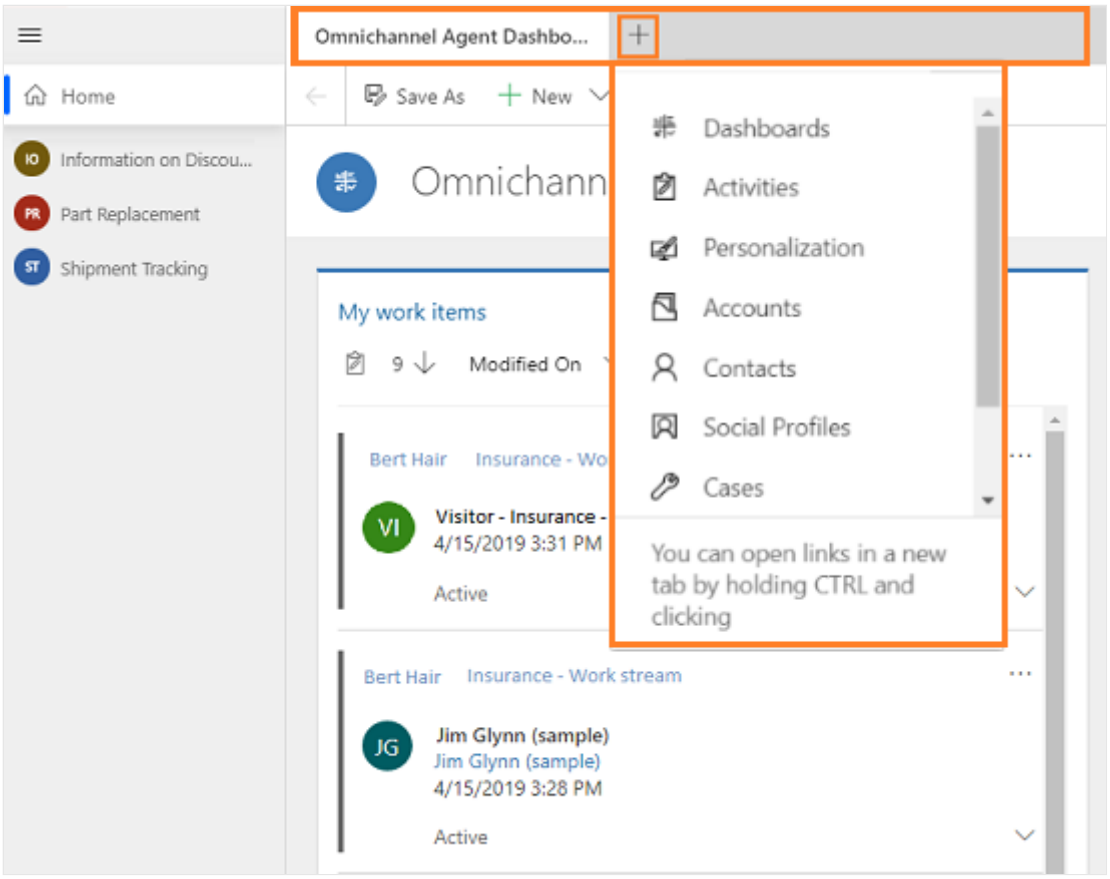
The communication panel is where you, as an agent, interact with your customer. When you sign in to the application, by default, the communication panel is in hidden mode. That is, the communication panel appears on the left side next to the session panel only when you accept an incoming conversation request. To learn more, see View communication panel.



Application tab panel

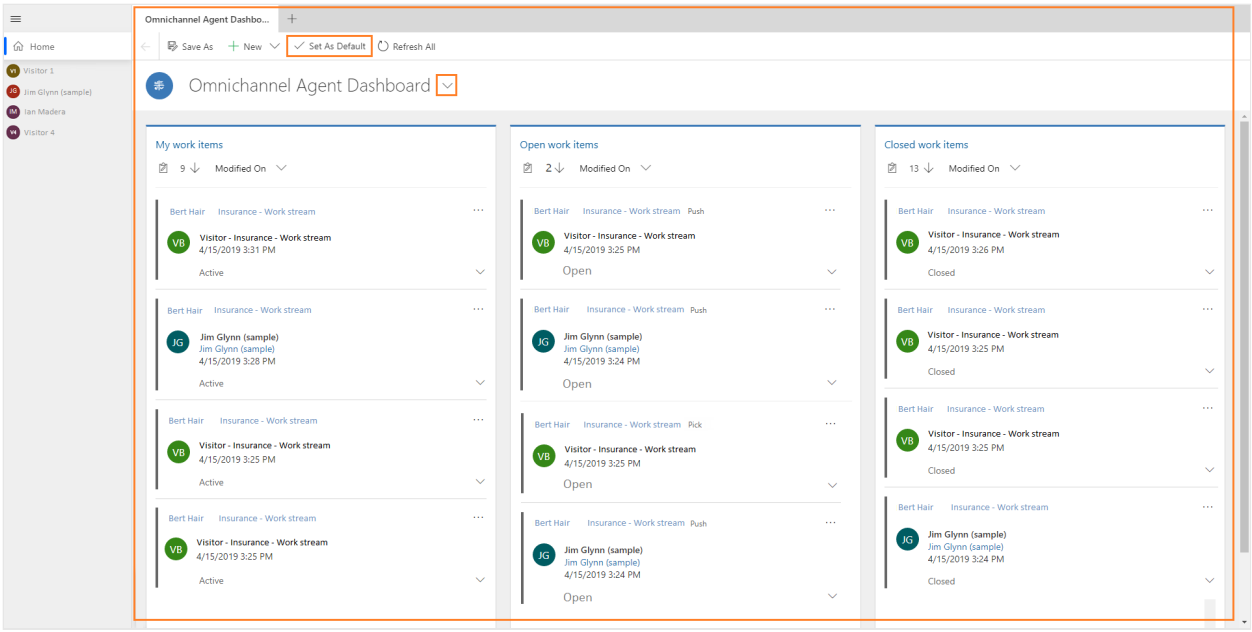
The horizontal bar below the navigation bar is called the application tab panel. Every customer session has at least one that is not closable. The Application tab has a + icon. If you select the icon, the menu that has options that are made available by your administrator. The menu shows the out-of-box and custom entities. Also, you can access

any third-party applications that are extended within Omnichannel for Customer Service app. Select the option from the list to open it in the application tab.



Unified Interface application area

When you sign in to Omnichannel for Customer Service, as an agent, in the application area, you see a dashboard that is set as default by your administrator. If set as default, Omnichannel Agent Dashboard shows the different work items in streams, and the dashboard is present in the application tab of the **Home** session and you can't close the dashboard tab.

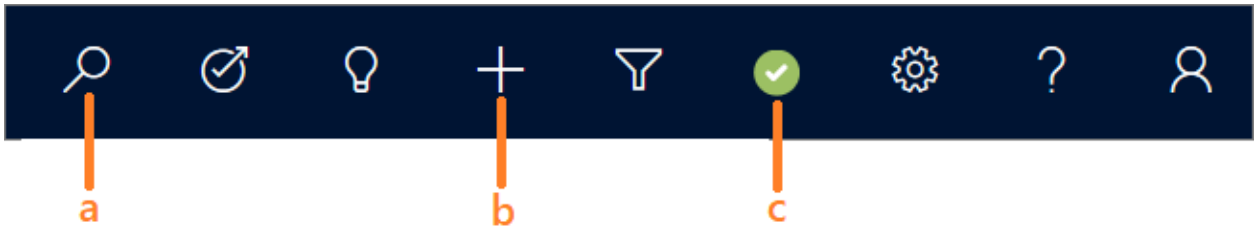


The dashboard shows the following work items: - **My work items** - **Open work items** - **Closed work items**

To learn more, see View agent dashboard and conversations (work items).

Search, quick create, and presence

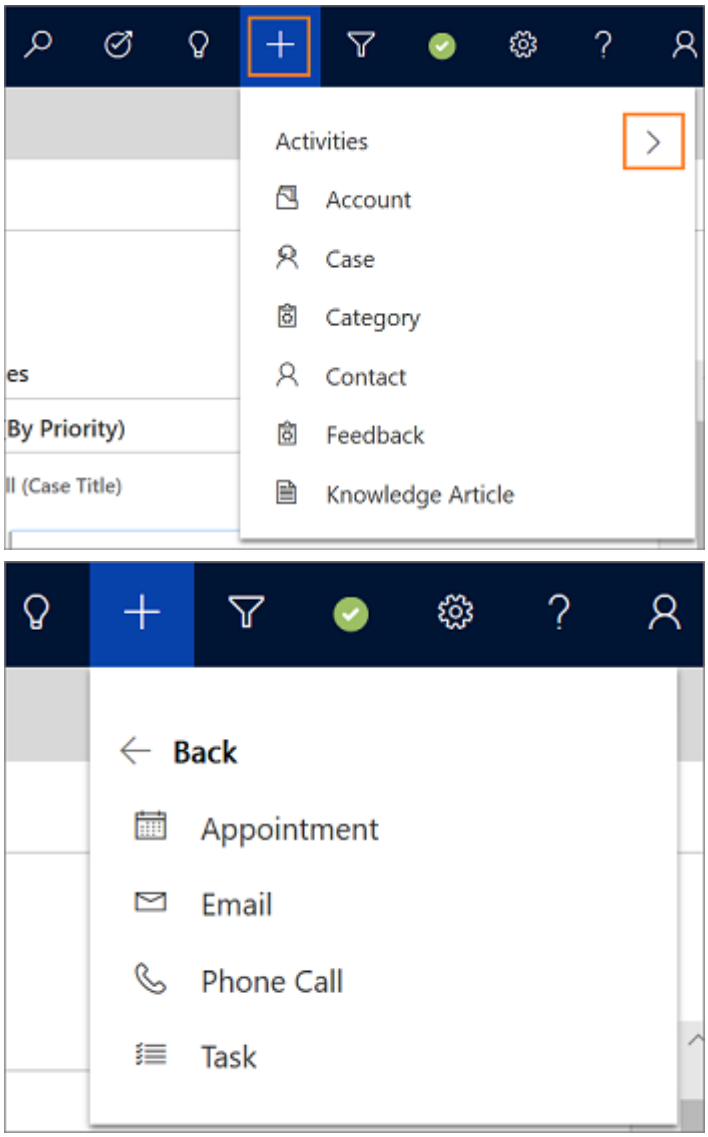
Search, quick create, and presence are the options present in the nav bar.



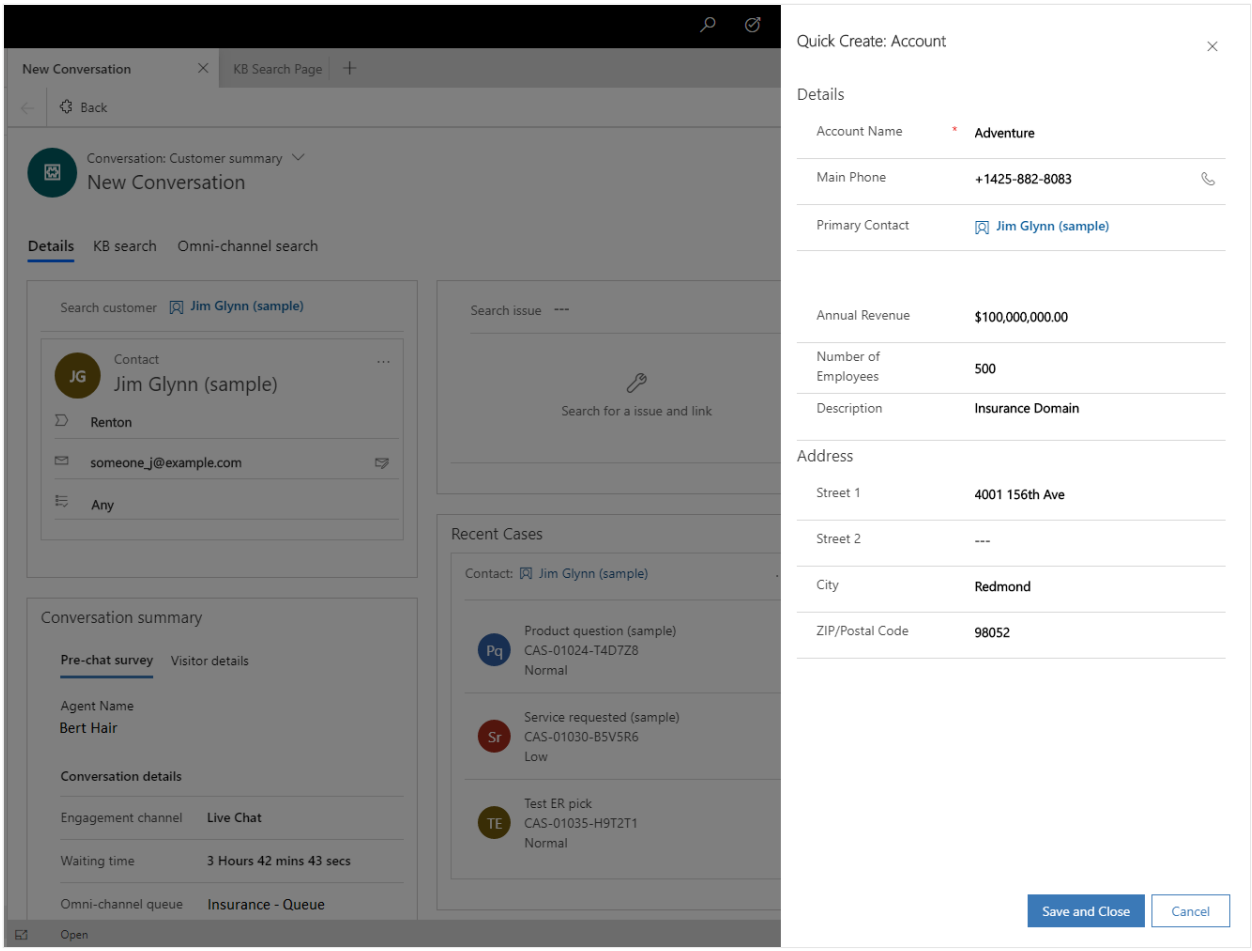
- **Search:** Do a simple search for records using the advanced search option and open the record in an application tab. Advanced Search is also called Categorized Search.
- **Quick create:** Add a new record. This option provides the list of related records that you can create. The following are the record types that you can create:
  - Activities
  - Appointment
  - Email
  - Phone Call
  - Task
  - Account
  - Case

- Contact
- Knowledge Article

Select the expand button next to Activities to create different activities.



When you select any record, the application displays a new quick create form. For example, select the **Account** record from the list. The application displays the **Quick Create: Account** form. Specify the details in the fields and save the form.



- **Presence:** Set presence as per your availability. Select the icon to launch the presence dialog and use the dropdown list to select a status. To learn more, see Manage presence status.

See also

- Manage sessions
- Manage applications
- Understand conversation states
- Sign in to Omnichannel for Customer Service
- View communication panel
- View agent dashboard and conversations (work items)

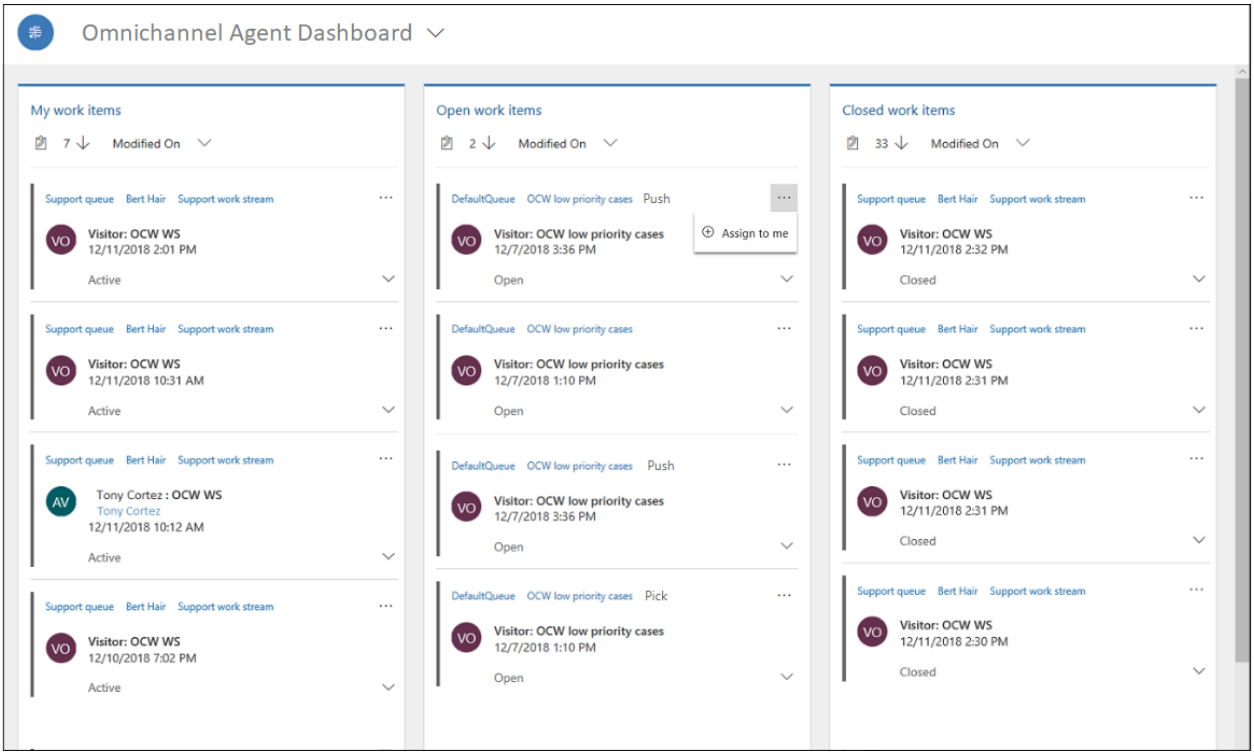
View agent dashboard and agent conversations

Article • 09/22/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

When you sign in to the Customer Service workspace or Omnichannel for Customer Service app, the Omnichannel Agent Dashboard is the default view. You can set any dashboard as the default view by selecting the **Set As Default** option. The dashboard displays the following streams:

- My work items
- Open work items
- Closed work items



My work items

In the **My work items** section, you can see the conversations (work items) that you are actively working on. Select the ellipsis and select the **Open** option to open the work

item in a session.

Open work items

In the **Open work items** section, you can see the conversations (work items) that are in an open state from all queues in which you are added as member. Select the ellipsis and select the **Assign to me** option to assign the work item to yourself. A session starts for the pick action. When you select a work item, you get a notification, and when you accept it, a session starts and the **Active Conversation** or case page loads.

The work item that you pick is moved from the **Open work items** section to the **My work items** section. If you reject the request, then the work item remains in the **Open work items** section.

Closed work items

In the **Closed work items** section, you can see all the conversations that you've closed on the same day. To view a closed work item, select its ellipsis button (**...**), and then select **Open** to view the details.

When you open a record from the **Closed work items** section, you can view the attributes of the closed conversation record. This will not reopen or reactivate the conversation.

Sort work items

On the dashboard, you can sort work items by the following categories:

- Modified On
- Work distribution mode (for open work items only)
- Customer
- Work stream
- Created On
- Transfer Count

See also

Create a record
Introduction to the agent interface
View communication panel

View notifications

Article • 10/16/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

A notification is a visual alert that appears each time you get a chat or an SMS conversation request from a customer. When you get the notification, you see the details about the customer with whom you're going to interact. When you accept the request, a session is started, and you can view the contextual information of the customer and case on the **Active Conversation** page.

Here are some scenarios where you might receive notifications:

- Case assignment if record routing is configured using workstreams for unified routing
- Incoming chat conversation
- Incoming SMS conversation
- Conversation (work item) assignment

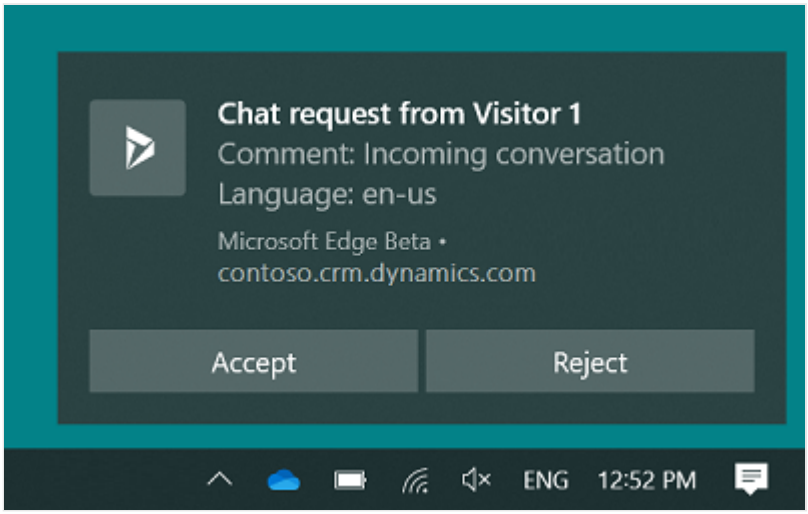
- Conversation transfer
- Conversation escalation
- Conversation escalation from a bot

Receive notifications when the app is in the background

Agents can receive notification alerts on their desktop always or only when the Customer Service workspace or Omnichannel for Customer Service app isn't in focus. These notifications help ensure that agents won't miss any conversation requests. Some scenarios where the app isn't in focus might include:

- The agent has minimized the app.
- The agent is working in another browser window.
- The agent is working on another tab of the browser.
- The agent is using two screens, and is on the screen that doesn't have either the Customer Service workspace or Omnichannel for Customer Service app.

> **Note**
>
> The **Always(preview)** option for **Show Desktop Notifications** is in preview. To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**.



You can accept or reject the conversation request by selecting a button on the desktop notification. When you accept the conversation request, the app is made active and displayed to you, and a session is started.

If you select the notification message body and not a button, the app is made active, and the notification is displayed to you in the app. Then you can choose to accept or reject the conversation by selecting the appropriate button.

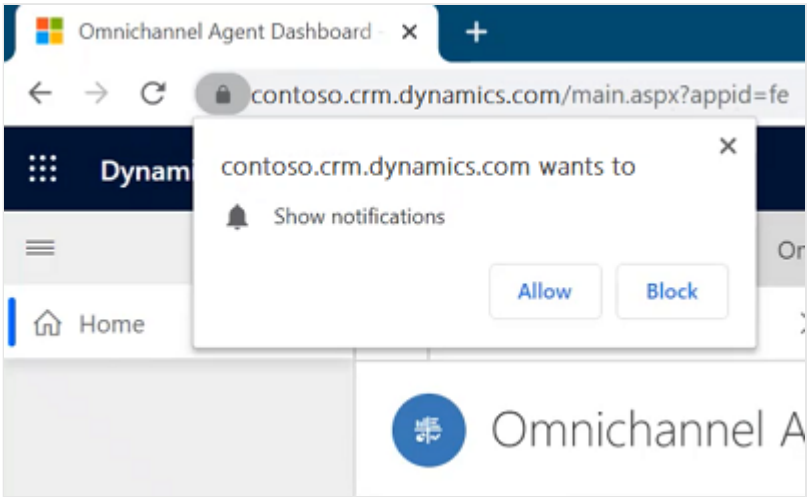
The wait time that's configured by your administrator applies to the desktop notification but doesn't display on it.

That is, your administrator has configured the wait time as 90 seconds and set the **Show Timeout** field to **No**. Now, when you get a notification, the wait time won't be displayed on the notification. However, you have 90 seconds to take action. More information: Manage notification templates and settings

> **Note**
>
> The desktop notification theme is based on the Windows operating system theme and settings.

Allow your browser to show notifications

To get desktop notifications, you need to allow your browser to show notifications. When you get a browser notification, select **Allow**.



Types of notifications

There are two types of notifications:

- **Toast notifications:** Also known as a floating notification, is a notification message type where you receive information in a dialog that disappears after a stipulated time. This type of notification appears for conversation (work item) assignments, conversation escalations, and conversation transfer scenarios.

- **Alert notifications:** A type of notification where a dialog appears with action buttons. When you select **Accept**, a screen pops up with the active conversation details. You need to take an action within the stipulated time, and the notification disappears when the time is up.

Based on your organization's configurations, you can't reject conversations. The application performs one of the following actions when an incoming notification appears:

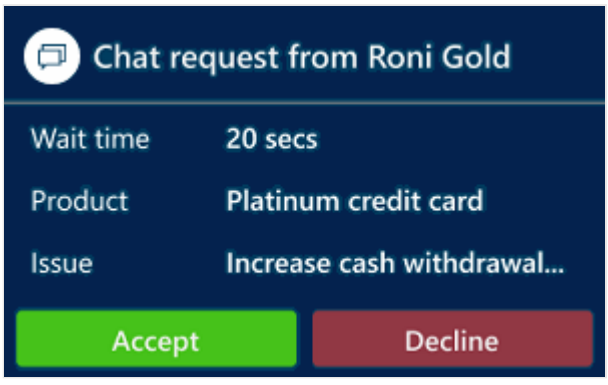
- Creates a work item and assigns it to you automatically.
- Automatically accepts the conversation and opens a new session.

Incoming voice call notifications

You'll receive a voice call notification for an incoming call request after an intelligent bot processes the call. For information on how the call is processed and the call controls that are available to you, see Use agent dashboard and call controls in the voice channel.

Incoming chat notifications

You receive a notification for an incoming chat request. When you accept the chat request, you'll see details about the customer in the **Active Conversation** page. A simultaneous session starts, and a chat window expands so you can exchange messages with the customer.

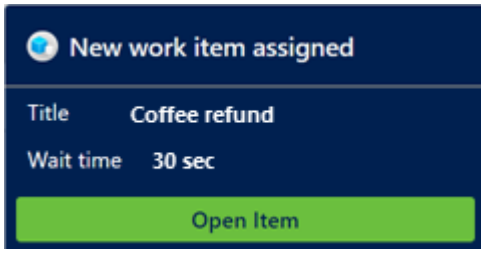


The details you'll see for a chat channel are as configured by your administrator.

Case assignment notification

If record routing is configured using unified routing and notifications are enabled, then when a case is assigned to you, you'll receive a notification with the open item option.

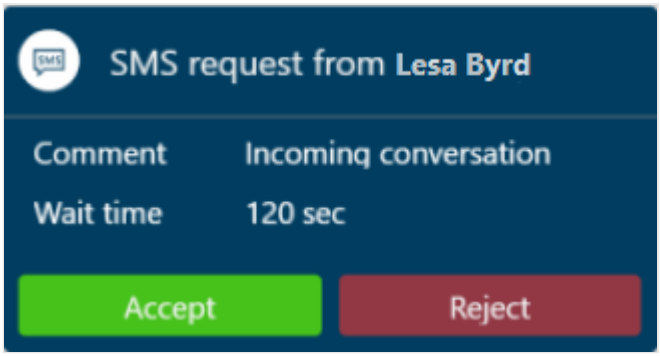
You can't reject the assignment, and irrespective of the notification timeout, the case will be assigned to you.



Incoming SMS notification

When you receive a notification for an SMS conversation request and you accept the SMS request, a session starts, and the communication panel appears in which you can exchange messages with the customer.

The customer is identified based on the **Mobile Phone** field information stored in the Contact record in Dynamics 365 Customer Service. That is, if the incoming SMS conversation is from a phone number stored in the mobile phone field of a Contact record, the conversation is automatically linked to the record.

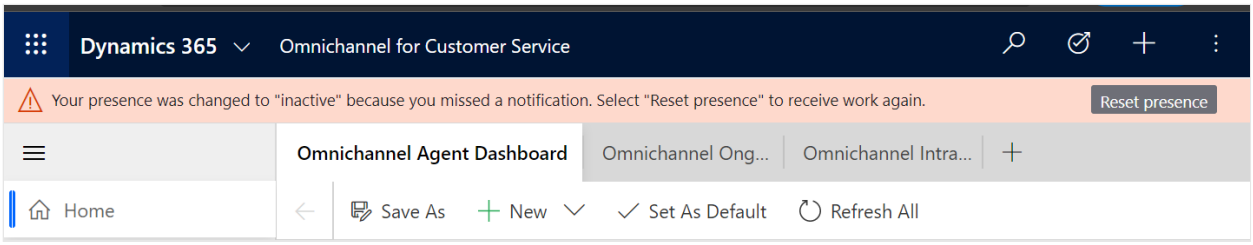


The details you see for an SMS channel are as configured by your administrator.

Missed notifications

> ⓘ **Important**
>
> - The alert is displayed only when the missed notifications feature is enabled by your administrator.
> - Missed notification alerts are not supported in Omnichannel for Customer Service on Unified Service Desk.

When you don't respond to an incoming conversation notification, you'll see an alert at the top of your dashboard and your presence status will be set to inactive. You can respond to the alert or change your status. Your presence will be reset to the status that was last defined by the system. You won't be assigned new tasks until your presence is reset to a state in which you can be assigned tasks, which is based on the allowed presence set in the workstream. Your supervisor can also reset your presence.



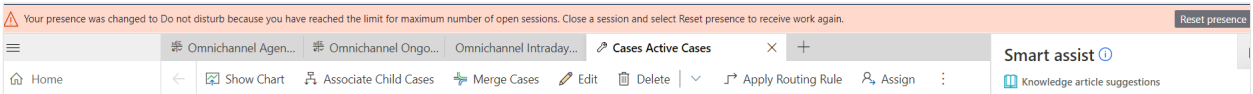
Notification time-out and rerouting of conversations

When you don't respond to an incoming conversation notification, the conversation will time out based on the time-out settings configured by your administrator and be rerouted.

Sometimes, you might see that conversations have been assigned to you without notifications showing up. This can happen when the notifications are sent by the system but they aren't seen because you had either closed the browser, navigated away from the app page, or had lost network connectivity before the notifications could be displayed. In such a case, while the system might take a few seconds to mark you as unavailable, it ends up assigning conversations to you. The conversations are then rerouted after eight minutes.

Maximum session limit notifications

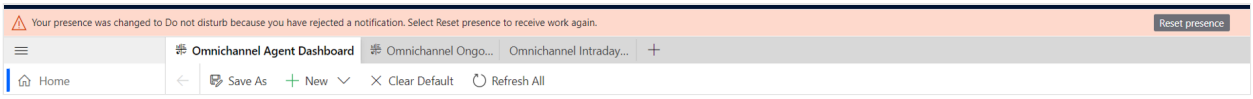
When you already have 10 sessions open, which is the maximum multi-session limit, and a new work item comes in, you'll see an alert at the top of your dashboard and your presence status will be automatically set to **Do not disturb**. You won't be assigned new tasks until your presence is reset to a state in which you can be assigned tasks, which is based on the allowed presence set in the workstream. Your supervisor can also reset your presence.



Agent reject notifications

> **Important**
>
> - This alert is displayed only when the agent reject feature is enabled by your administrator.
> - Agent reject notification alerts aren't supported in Omnichannel for Customer Service on Unified Service Desk.

When you reject a work item notification, you'll see an alert at the top of your dashboard and your presence status will be set to **Do not disturb**. You can respond to the alert or change your status. Your presence will be reset to the status that was last defined by the system. You won't be assigned new tasks until your presence is reset to a state in which you can be assigned tasks, which is based on the allowed presence set in the workstream. Your supervisor can also reset your presence.



See also

View customer information on Active Conversation form
View communication panel
Monitor real-time customer sentiment
Manage presence status
Search for and share knowledge articles
Take notes specific to conversation
View active conversations for an incoming conversation request
Manage notification templates and settings

View the communication panel for conversations

Article • 09/28/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

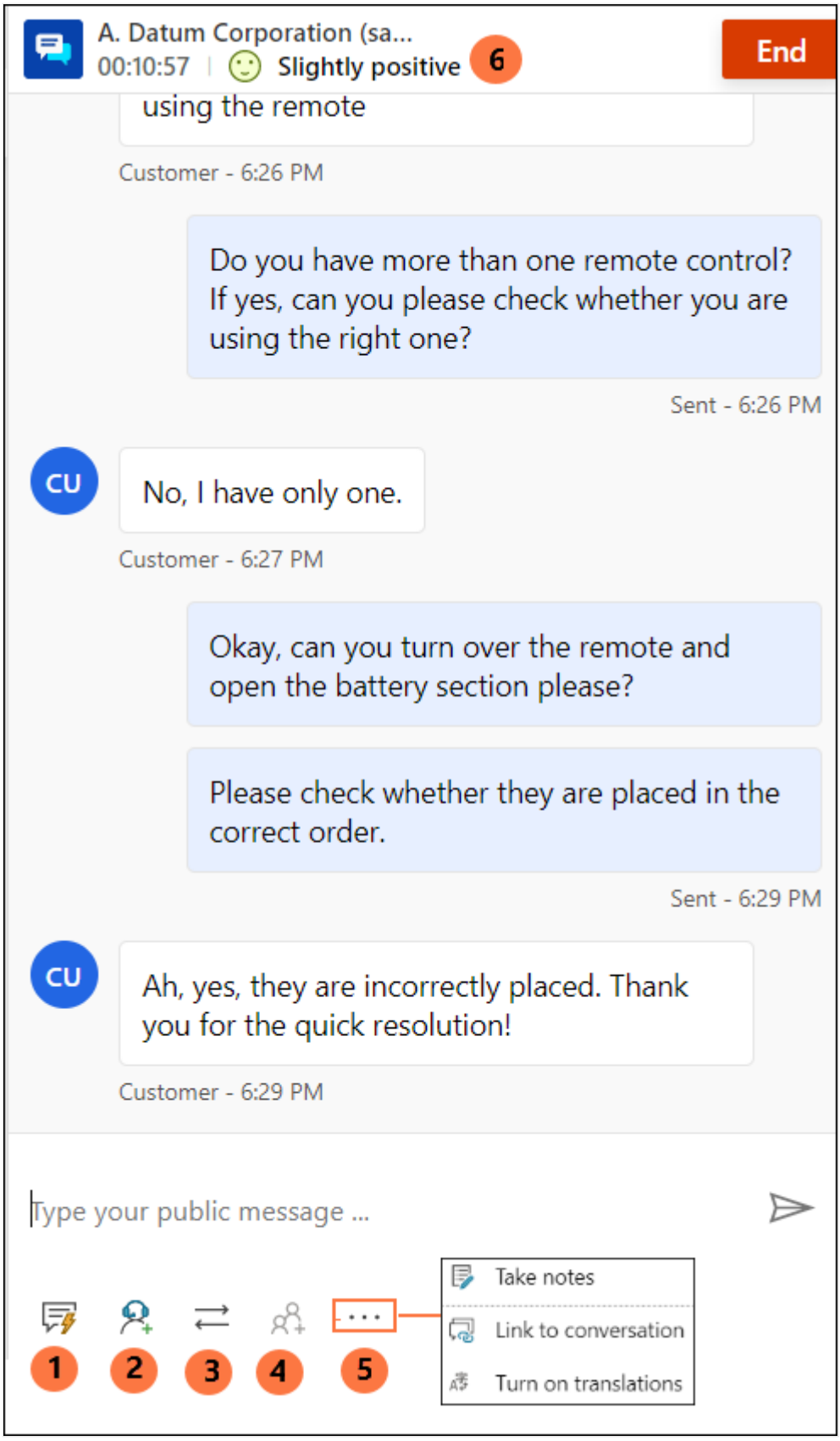
The communication panel is where you, as an agent, interact with your customer. When you sign in to the application, the communication panel is in hidden mode by default. You can view the communication panel only when you accept an incoming conversation to communicate with the customer.

If you want to minimize the communication panel, select **Minimize**. The communication panel is collapsed to a window in the left corner of the Active Conversation form, giving you more screen space.

You can increase or decrease the width of the communication panel for a specific channel by dragging the right edge of the communication panel to the left or right. The resized width of the communication panel is channel specific. For example, if you increase the width of the communication panel for chat, the next time you get a chat conversation, you'll see the resized panel. However, the width remains the same for another channel, such as WhatsApp. You can resize the communication panel when it is in the expanded mode only.

You can do the following tasks in the communication panel:

- Send quick replies.
- Search for and share knowledge articles with the customer with whom you are interacting.
- Transfer the conversation (work item) to another agent or queue.
- Use the consult option if you need help with resolving the work item.
- Generate a summary of the conversation. More information: View and share auto-summarized conversations



Enhance agent productivity using keyboard commands

The communication panel has options that you can use to perform actions, such as see quick replies, consult, and transfer, and launch notes control. You can also use keyboard

commands to perform these actions.

The following table lists the options and the keyboard shortcuts that you can use.

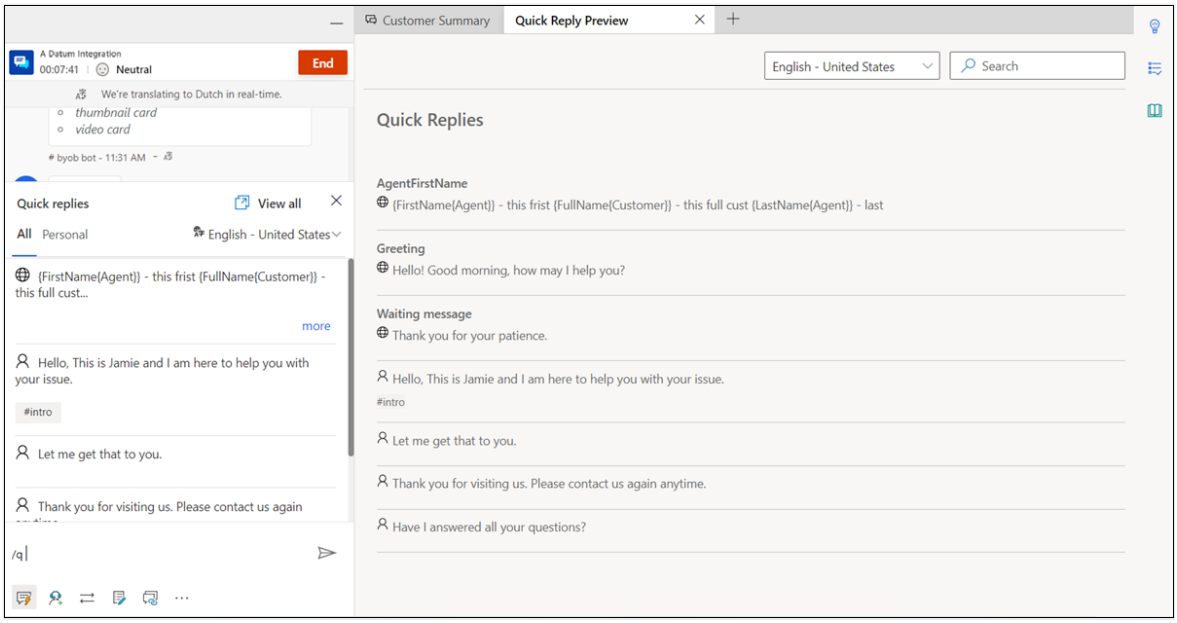
Annotation	Option	Description	command
1	Quick replies	Send templatized messages created by you as personal quick replies or quick replies created by your administrator	`/q`
2	Consult	View list to consult with other users	`/c`
3	Transfer	View list to transfer the request	`/t` and `/tq`
4	Add to chat	Is enabled when the second agent accepts a consult request	
5	- Take notes - Link to conversation - Translation	- Take notes specific to conversation - Link the record to this conversation - If translation of messages is enabled, you can turn on or off the translation	
6	Customer sentiment	View real-time customer satisfaction levels	

Send quick replies

The communication panel allows you to send predefined messages to a customer with whom you're interacting. These predefined messages are stored as quick replies.

Use the following options to use quick replies in your conversation:

- Select the **Quick replies** button to retrieve the messages and send them to the customers and or agents with whom you consult.
- Use a keyboard command to see the list of quick replies. Type the forward slash (/) key and the letter q (**/q**). When you type **/q**, the **Quick replies** panel is displayed.
- Select **View all**. The quick replies are displayed in the right pane. You can select a quick reply in the list to send to the customer. You can also choose a language of your choice and search for the quick replies.

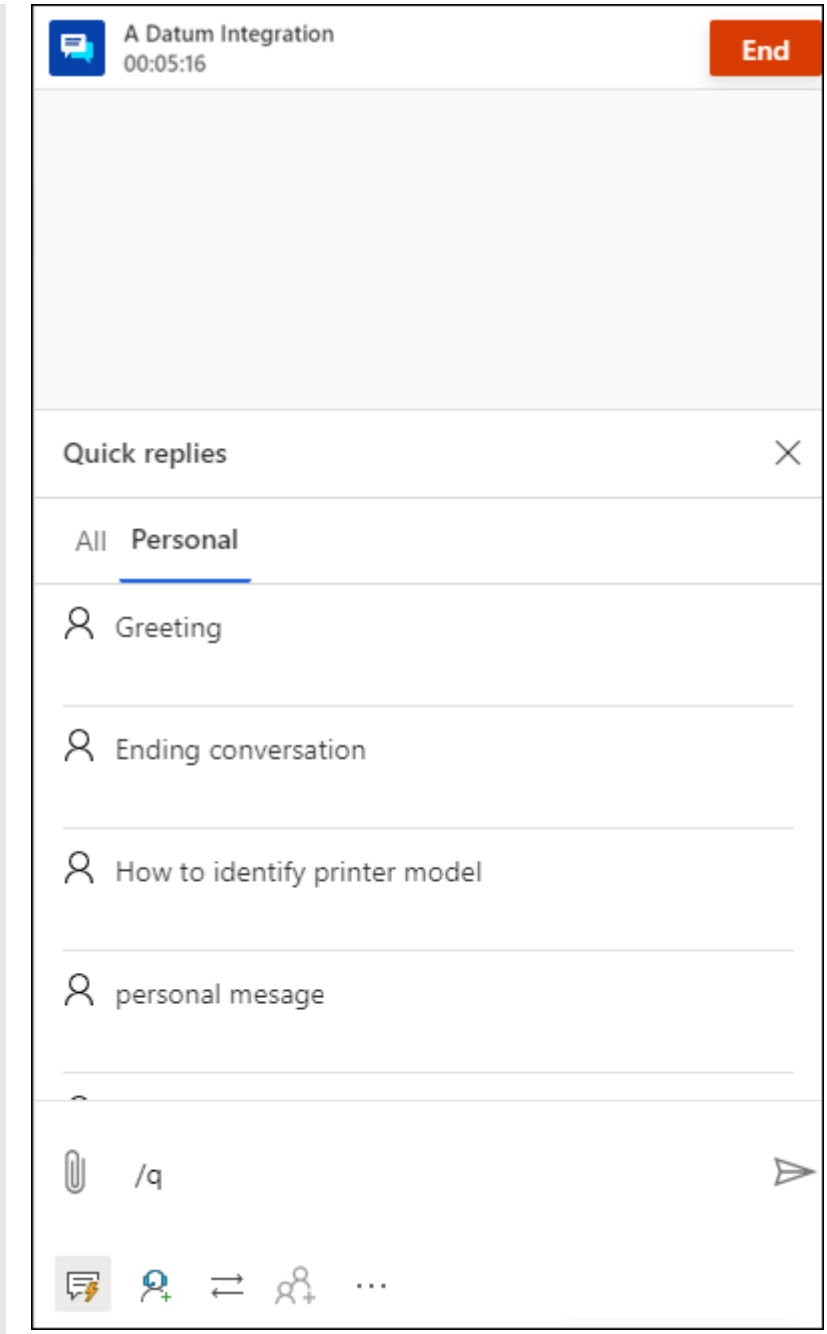


The quick replies can be created either by the administrator or by you. You can create personal quick replies if the administrator has enabled the option. The quick replies you created are available on the **Personal** tab of the **Quick replies** panel, and those created by the administrator are available on the **All** tab. Use the personal quick replies when you're in a conversation with a customer by doing the following:

1. Select the quick responses icon at the bottom of your conversation window. The **Quick replies** panel displays the available predefined messages on the **All** and **Personal** tabs.

2. Select the **Personal** tab, and type the number sign (#) in the compose box to list the tags and search for the personal quick replies that are available for your use.

3. Use the **more** option to view the complete text of the quick reply.



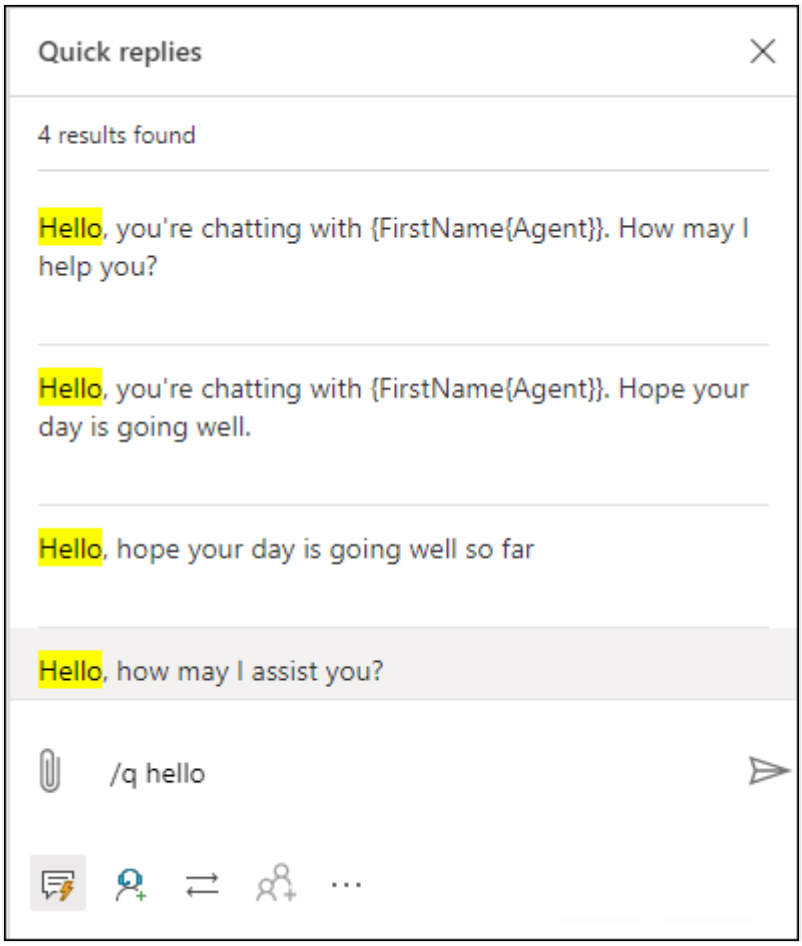
Search for quick replies and tags

After you type **/q** in the communication panel messaging area, you can continue typing any keywords and if the **Quick replies** library has at least one message associated with the word, it's filtered and displayed to you. You can also use the number (#) sign to search for the predefined messages.

You can type any of the following options in the compose box to search for the messages that are available for your use:

- Type **/q**, followed by <**keyword**>, to list messages that match the keyword.
- Type **/q**, followed by the number sign (**#**), to list all tags.
- Type **/q**, followed by <**tagname**> <**keyword**>, to list quick replies that match the tag and keyword.

- Type **/q**, followed by <**tagname**>, to list all quick replies that match the tag. Additionally, you can also add another tag after the <**tagname**> for example, type **/q**, followed by <**tagname**> <**tagname**>, to further refine the quick replies matching both the tags.



Share reconnection link with customers

If the reconnection link is configured by your administrator, you can share the link with customers during the session that they can use to connect back to the chat when they're disconnected for some reason, such as loss of connectivity or restart of their computer. The reconnection link information is available as a quick response.

> ⓘ **Important**
>
> You can share the reconnection link only when you don't end the chat session using the **End** button.

Consult with agent or supervisor

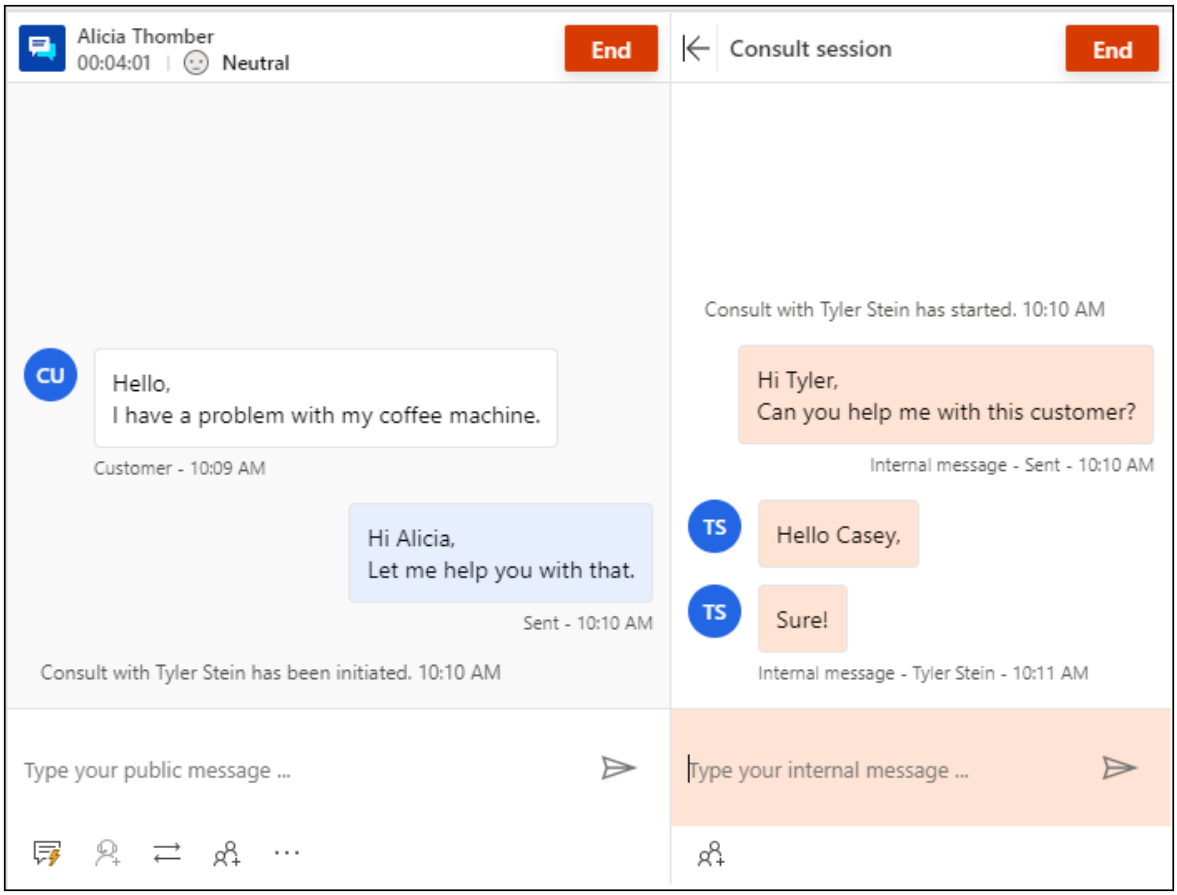
You can consult with other agents or supervisors using the consult option. You can invite the agent or supervisor by selecting the **Consult** button in the communication panel and choosing an agent from the list of available agents.

The following events occur when you select the **Consult** button:

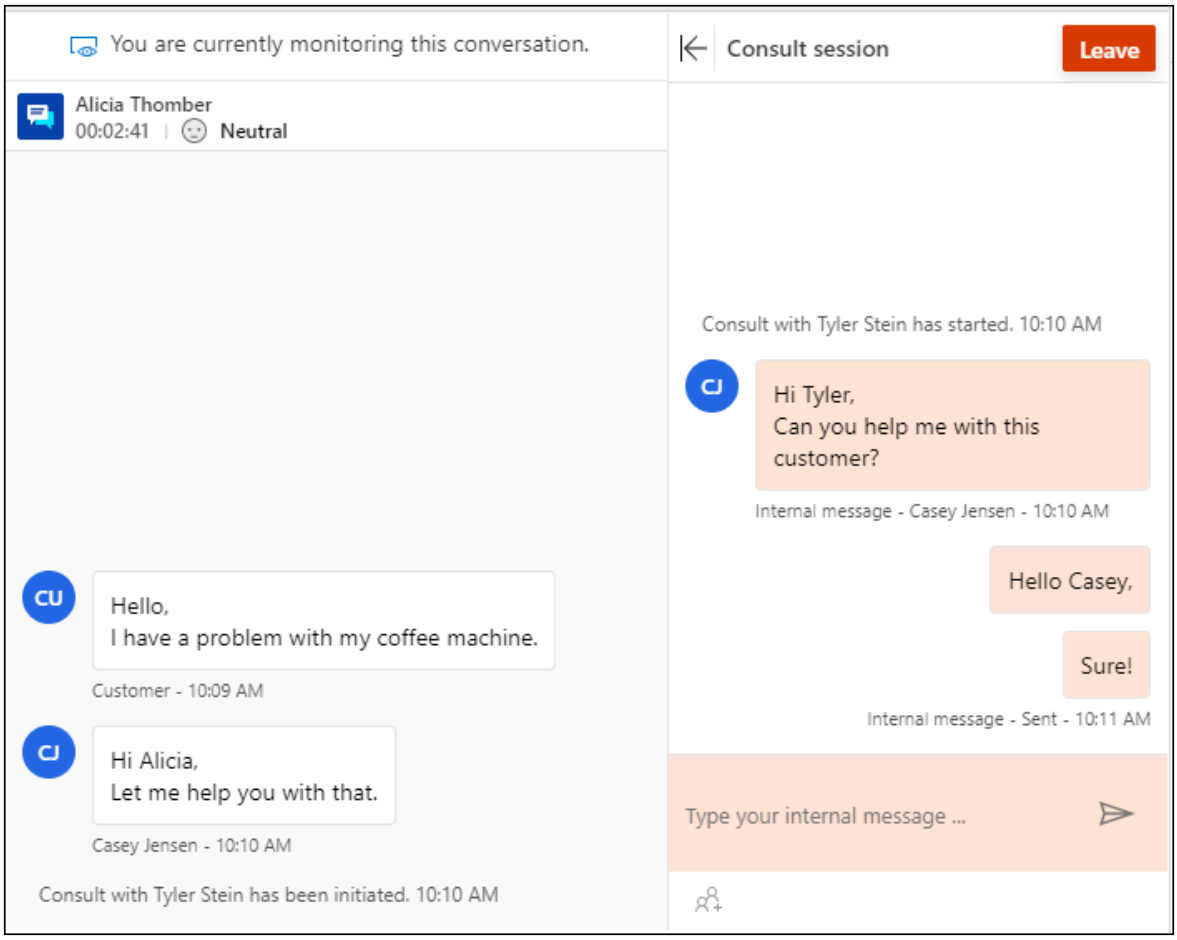
1. The agent can search for agents to consult within the same queue or other queues, select and invite an agent, and then start a consultation.

2. The secondary agent receives a notification for the consult request.

3. When the secondary agent accepts the consult request, a separate pane with an option to end will open beside the communication panel for the primary agent.



4. The secondary agent sees a consultation window on the page with an option to leave. They'll also have a read-only view of the messages exchanged between the primary agent and customer.



5. The primary agent can add the secondary agent to the customer conversation by selecting the people icon. The secondary agent can join the customer conversation only after the primary agent selects to add the agent.

Additionally, the following considerations apply:

- You can use the UI buttons to collapse and expand the consult pane. When the primary agent selects the option to take notes, the consult pane is in collapsed mode.
- The primary agent can end the consult or the secondary agent can leave, after which, the secondary agent won't be able to view the interaction between the primary agent and customer.

You can also use a keyboard command to see the list of agents and or supervisors who are available for consultation. Type the forward slash (/) key and the letter c (**/c**). Type forward slash and the letters cq (**/cq**) to view the list of queues.

> **Note**
>
> We recommend that you invite no more than five consulting agents when conversing with the customer.

After you type **/c** in the communication panel messaging area, you can continue typing the name of the participant and if it's present, the names are filtered and displayed to you.

Transfer conversations

In the communication panel, you can transfer the work item either to an agent or a queue. The transfer to the agent can be performed only after consult with the agent has been established. Without bringing agents in to consult, only transfer to queues are available. If operating hours have been configured for the queues, you can successfully transfer the conversation to only those queues that are operational at the transfer time.

After the transfer is complete, the agent who initiated the transfer will no longer be able to participate in the conversation.

Agents whose presence is set to Busy-DND, Away, or Offline don't appear in the agent list of the transfer pane.

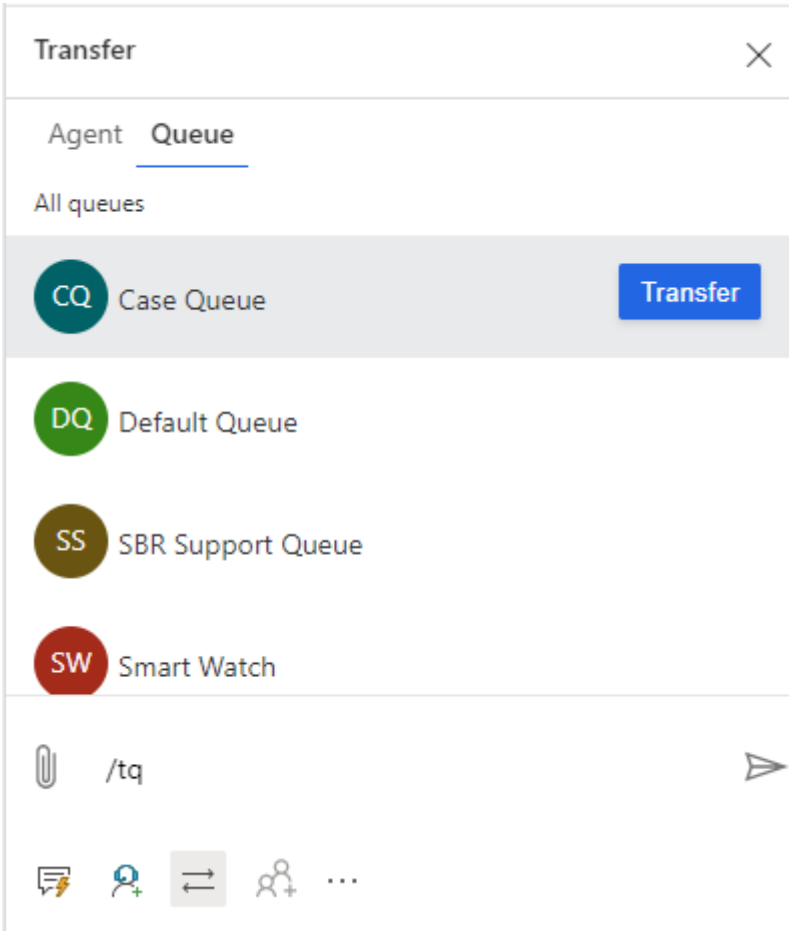
Use the keyboard command to see the list of agents and/or the supervisor who is available for transfer. Type the forward slash (/) key and the letter t (**/t**).

Use the keyboard command to see the list of queues to transfer the conversation request. Press the forward slash (/) key and the letters T and Q (**/tq**).

/t (forward slash, letter t) launches the **Agent** and **Queue** tabs. Select either tab and then select the agent or the queue from the list to transfer the conversation. The **/t** command keeps the focus on the Agent tab whereas the **/tq** command keeps the focus on the Queue tab.

When skill-based routing is enabled, then during the transfer, the **Transfer** panel shows users sorted in the order of matching skills. A check for agent skills isn't done by the app and the conversation can be transferred to any agent irrespective of the skill match.

When a conversation needs to be transferred from one queue to another, the matching criteria that were used in the conversation will be reused to find an agent in the new queue. For example, if exact match had been used to attach the skills to the conversation, the same criteria is used to find the agent in the new queue.



Search agents or queues for transfer of conversation requests

After you type **/t** or **/tq** in the communication panel messaging area, you can continue typing the name of the participant and if it's present, the agent or queues names are filtered and displayed to you.

Take notes specific to conversations

Use the notes option to capture information specific to the conversation when you interact with customers. Use the More commands option in the communication panel to launch the notes.

To learn more, see Take notes specific to conversation.

Link to conversations

When you have a conversation with a customer, you can use the link option that's at the bottom of the conversation control to link the conversation to the case, account, or contact record.

To learn more, see Search, link, and unlink a record to the conversation.

Monitor real-time customer satisfaction

As an agent, you can view the real-time customer satisfaction levels on the communication panel. A sentiment icon is displayed at the top of the communication panel based on the previous six customer messages sent to you.

To learn more, see Monitor real-time customer sentiment

See also

Monitor real-time customer sentiment
Introduction to the agent interface
Manage sessions
Manage applications
Manage presence status
View customer information on Active Conversation form
Search for and share knowledge articles
Take notes specific to conversation
View active conversations for an incoming conversation request

View customer information on Active Conversation form

Article • 07/18/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> The **Customer Summary** form is renamed as **Active Conversation** form.

One of the major challenges that customers face when contacting customer support is repeatedly giving the same information about the issue to each support agent they talk to. And if they want to review the status of their request later, they have to share the same information with another support agent to explain the context of the engagement. To avoid this situation, support agents need access to all the information the customer has provided, including details about the product or service, issue, case history, related cases, and location.

Having this information ready can help support agents reduce the hold time that they spend retrieving customer information, reduce average handling time, and increase customer satisfaction by resolving issues faster.

What is Active Conversation?

Active Conversation (formerly **Customer Summary**) is a page that appears when you accept an incoming request from any channel and gives you complete information about a customer. The **Active Conversation** view provides the following sections:

- Customer (Contact or Account)
- Conversation summary
- Case
- Recent cases
- Timeline

If your administrator has enabled the **Customise active conversation form** in Customer Service admin center, you'll see the following options on the **Active Conversation** page:

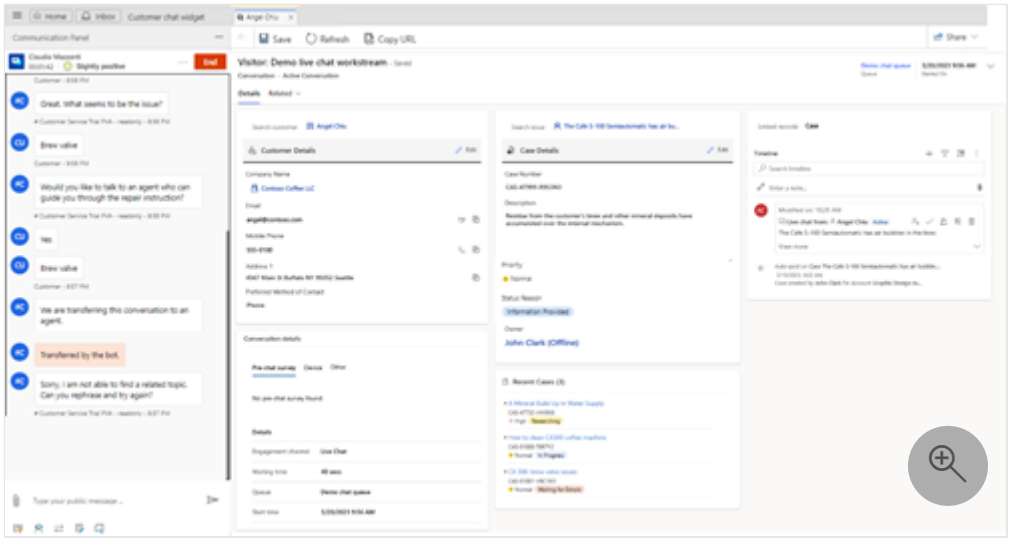
- **Save**: You can edit and save standard and custom field values added to the **Active Conversation** form by your administrator. However, the following Logical column names aren't supported. If a default value is already set for a field, the value appears on the form automatically.
- **Refresh**: Refreshes the data in the form.
- **Queue:** The queue through which the conversation has been assigned to you.
- **Start time:** The time when you started the conversation.
- **Related**: To select and navigate to the required entities.

Depending on the settings that are enabled for you, you'll see one of the following layouts:

Enhanced Active Conversation page

If your administrator has enabled the **Enhanced Active conversation form** in Customer Service admin center, you see the enhanced **Active Conversation** page. The application displays the customer or account, and case details cards with inline edit capabilities. You can also view the Recent cases card with color coded priority and status fields.

> **Note**
>
> - The form selector to switch between **Active Conversation** and **Closed Conversation** is hidden. You can't switch to closed conversation form from the **Active Conversation** form while the conversation is still active or vice versa.
> - You can see the form selector on the enhanced Active Conversation form if your administrator has enabled it for you. More information: **Display the form selector on Active Conversation form**



View customer details

This section provides details such as the contact name or account name. For a contact, you can view the location, email, and other details. For an account, you can view location, telephone number, and primary contact person for the account.

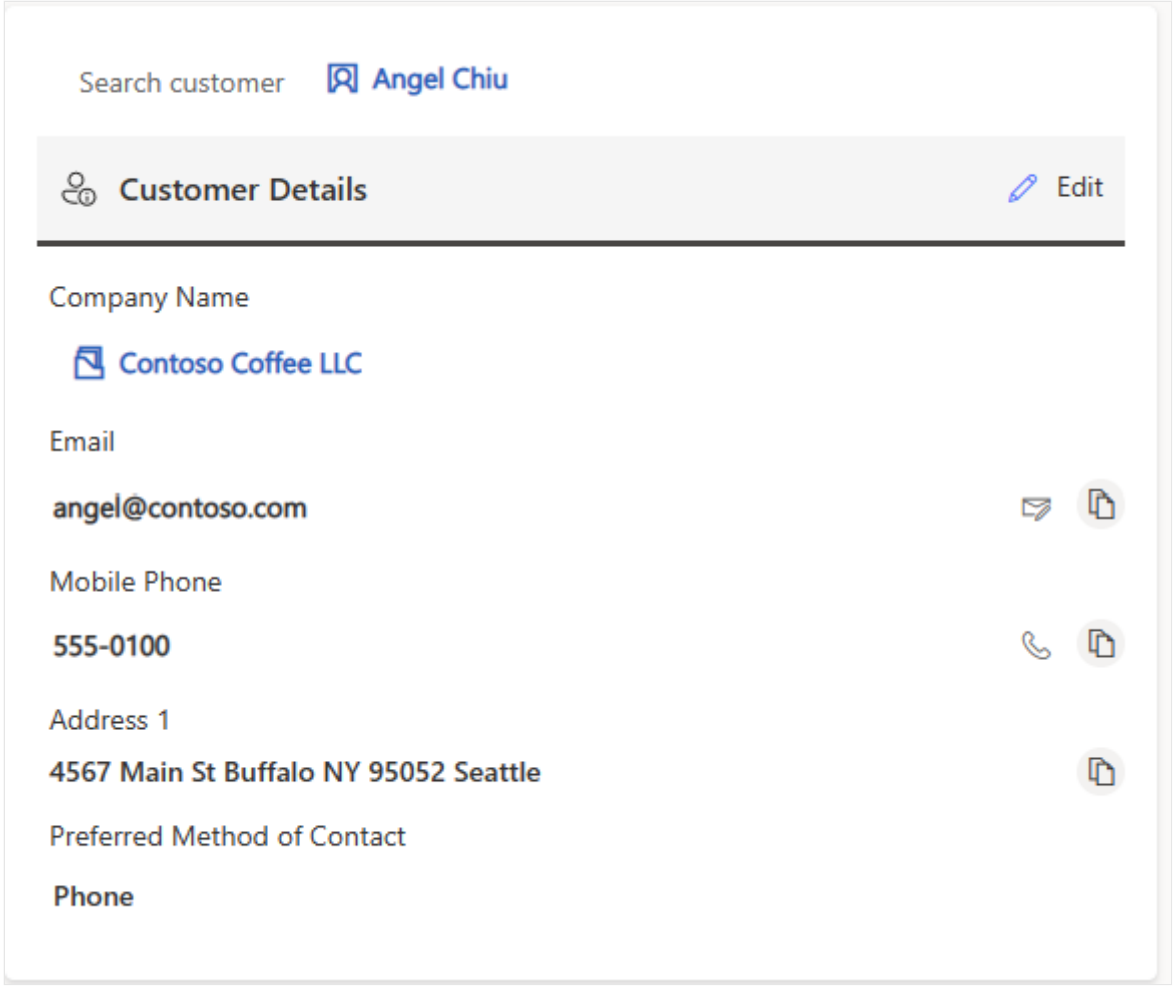
Use the customer section to search for an existing contact or account record, and select the record to link it to the conversation. If the record doesn't exist, you can create a new contact or account record by using the **Add Contact** or **Add Account** button, respectively. After you create it, search for the record and then select it to link it to the conversation.

Depending on the settings that are enabled for you, you'll see one of the following layouts:

Enhanced Active Conversation—Customer Details

Displays the customer or account details. The fields displayed on this card are based on your administrator's configuration. For more information, go to Add the Customer 360 component to a case form.

You can edit the customer or account details inline, without navigating to another tab. However, if you see the default **Customer(Contact or Account)** card, your administrator has disabled the enhanced **Customer Details** experience for the **Active Conversation** form.



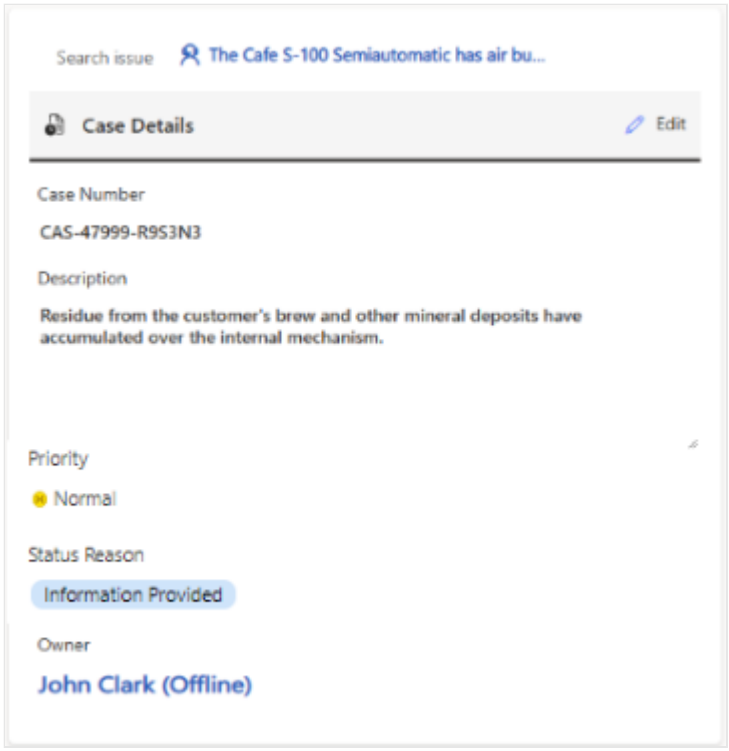
View case details

Use the **Case** section to search for an existing case, and select the case to link it to the conversation. If the record doesn't exist, you can create a new case by using the **Add Case** button. After you create it, search for the record and then select it to link it to the conversation. More information: Case management in multisession apps

Depending on the settings that are enabled for you, you'll see one of the following layouts:

Enhanced Active Conversation — Case Details

Displays the details, configured by the of the case linked to the conversation. You can edit case details inline, without navigating to another tab. However, if you see the default **Issue Snapshot** card, your administrator has disabled the enhanced **Case Details** experience for the **Active Conversation** form.



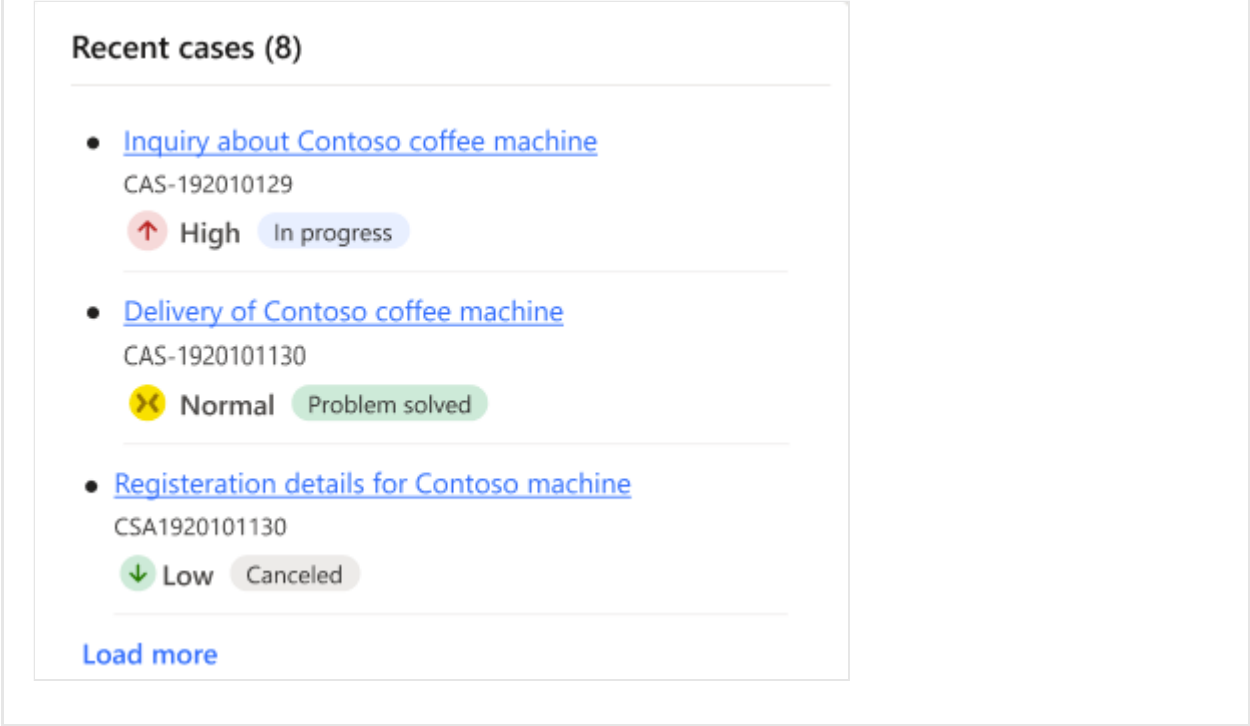
View recent cases

This section displays recent cases related to the customer.

Depending on the settings that are enabled for you, you'll see one of the following layouts:

Enhanced Active Conversation—Recent case

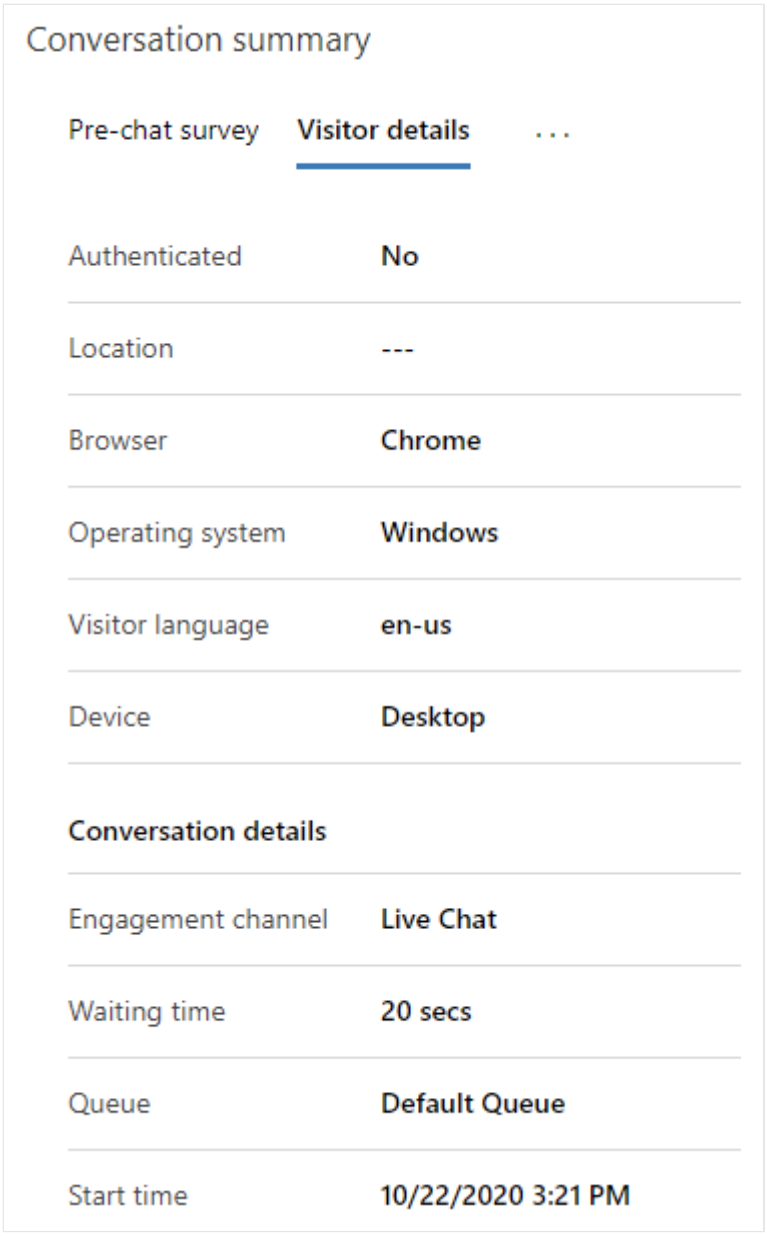
Displays the recent cases raised by the customer. The fields displayed on this card are based on your administrator's configuration. For more information, go to Customize recent cases.
However, if you see the default **Recent cases** card, your administrator has disabled the enhanced recent case experience for the **Active Conversation** form.



View Conversation summary

The **Conversation summary** section provides detailed information about the conversation between the agent and customer. The information shown in the **Conversation details** area includes the following:

- **Engagement channel:** The channel, such as live chat or custom channel, through which the conversation is taking place.
- **Waiting time:** The time the customer had to wait before the conversation was assigned to the agent.
- **Skills:** The skills that had been attached for routing the conversation. If your administrator has enabled the setting for agents to update skills, you can add or remove skills.
- **Queue:** The queue through which the conversation has been assigned to you.
- **Start time:** The time when you started the conversation.



In addition, the **Conversation summary** section includes several tabs:

- Pre-chat survey
- Self service
- Visitor details
- Additional details, if they've been configured and other context variables are available

These tabs are described in the following sections.

View Pre-chat survey

The **Pre-chat survey** tab displays the customer's answers to the survey questions that were posed by your organization, which helps your interaction with the customer.

View Self service

The **Self service** tab displays information about the activities that the customer performed before starting a conversation with an agent. This information helps you understand why the customer reached out and helps you provide a personalized service for enhanced customer satisfaction. The activity information, which is categorized into the following action types, appears in reverse chronological order.

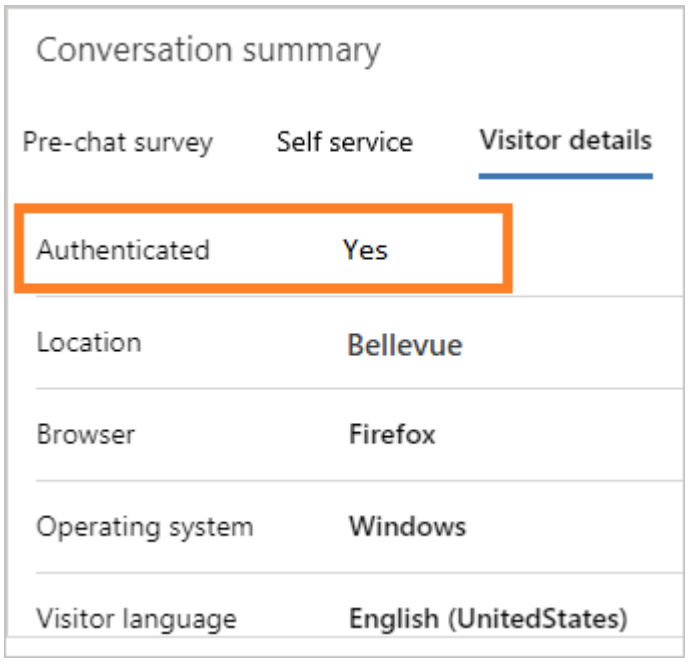
Action type	Description
Page visited	The page visited on the portal, with time stamp.
Phrase searched	The keyword or phrase that was searched for, with time stamp.
Knowledge article viewed	The knowledge article viewed, with time stamp.
Custom action performed	Any other custom action that's tracked by your organization, with time stamp.

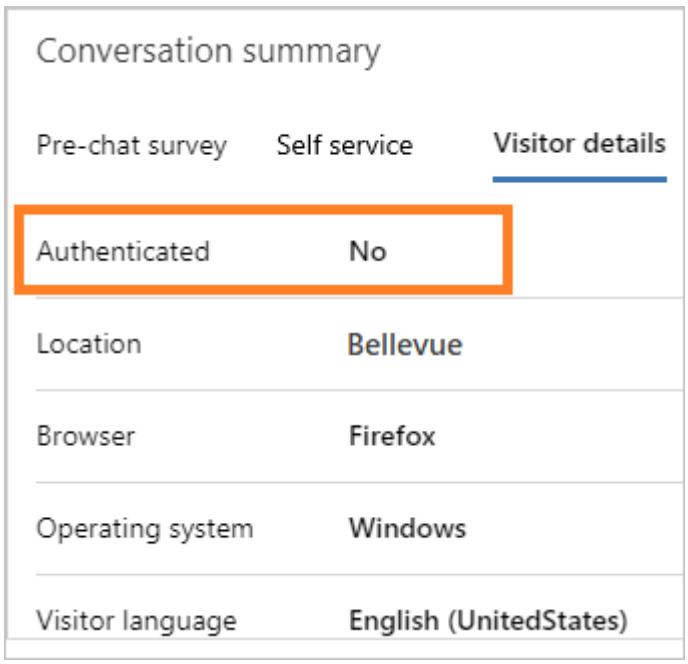
To configure the appearance of the **Self service** tab, see Enable self-service settings for customer actions in a conversation summary.

View Visitor details

The **Visitor details** tab provides information such as whether the customer is authenticated, the browser the customer used to contact support, the operating system used by the customer, the customer's location, and the language used during the interaction.

If the customer has signed in to the portal to initiate the chat with a support agent, the **Authenticated** field value is **Yes**; otherwise, the **Authenticated** field value is **No**.





To learn more, see Create chat authentication settings.

View Additional details

If your administrator or developer has configured the **Additional details** tab and if any other context variables exist, they're displayed on the **Additional details** tab.

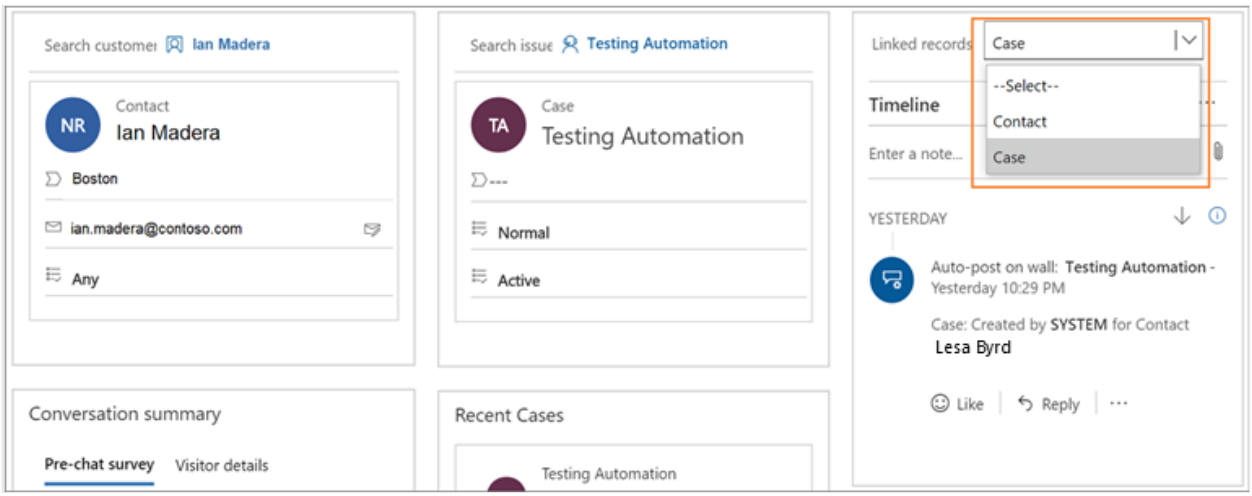
To learn more, see setContextProvider.

View Timeline

This section displays case-related and customer-related activities in the form of a timeline. You can create quick notes based on your discussion with the customer. Use

the **Linked records** field to switch the timeline based on the case, contact, or account record linked to the conversation.

The **Linked records** field shows the record that's linked to the conversation. For example, if you link a contact and case to the conversation, the **Linked records** dropdown list shows **Contact** and **Case**, respectively.



See also

Search for and share knowledge articles
View communication panel
Monitor real-time customer sentiment
View active conversation for an incoming conversation request
setContextProvider

Create a record for conversations

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

When no records are linked to the conversation in Omnichannel for Customer Service, you can create a record. You can create a record in one of the following ways:

- Create a record from the **Active Conversation** page
- Create a record using the **Quick Create** option
- Create a record using the **New** option

Create a record from the Active Conversation page

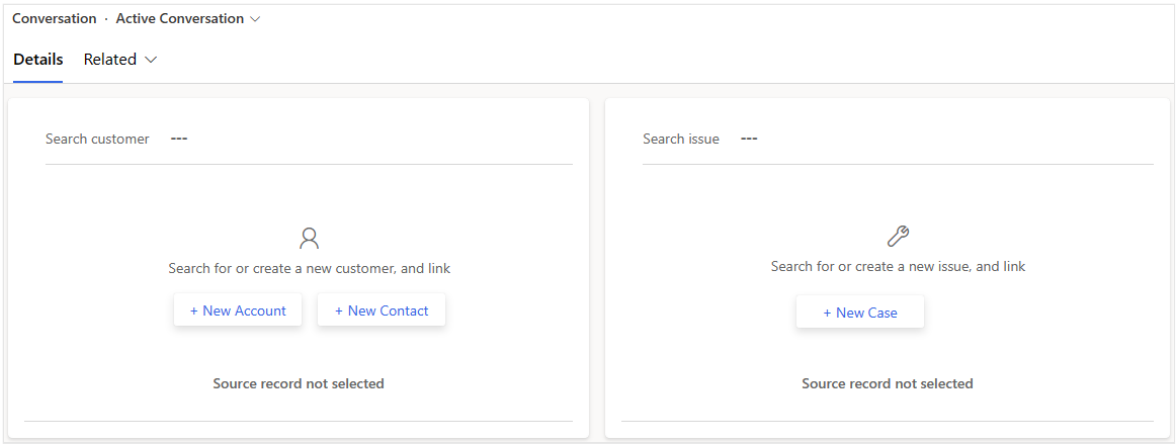
In the **Active Conversation** page and on the customer and case forms, you'll see an option to create a new record. When you select the **New** option, a corresponding form opens in a new tab. You can fill in the details and save the record, and the record is auto-linked to the conversation.

Depending on your administrator's settings, you'll see the enhanced **Active Conversation** or the default **Active Conversation** page.

To create a record from the **Active Conversation** page:

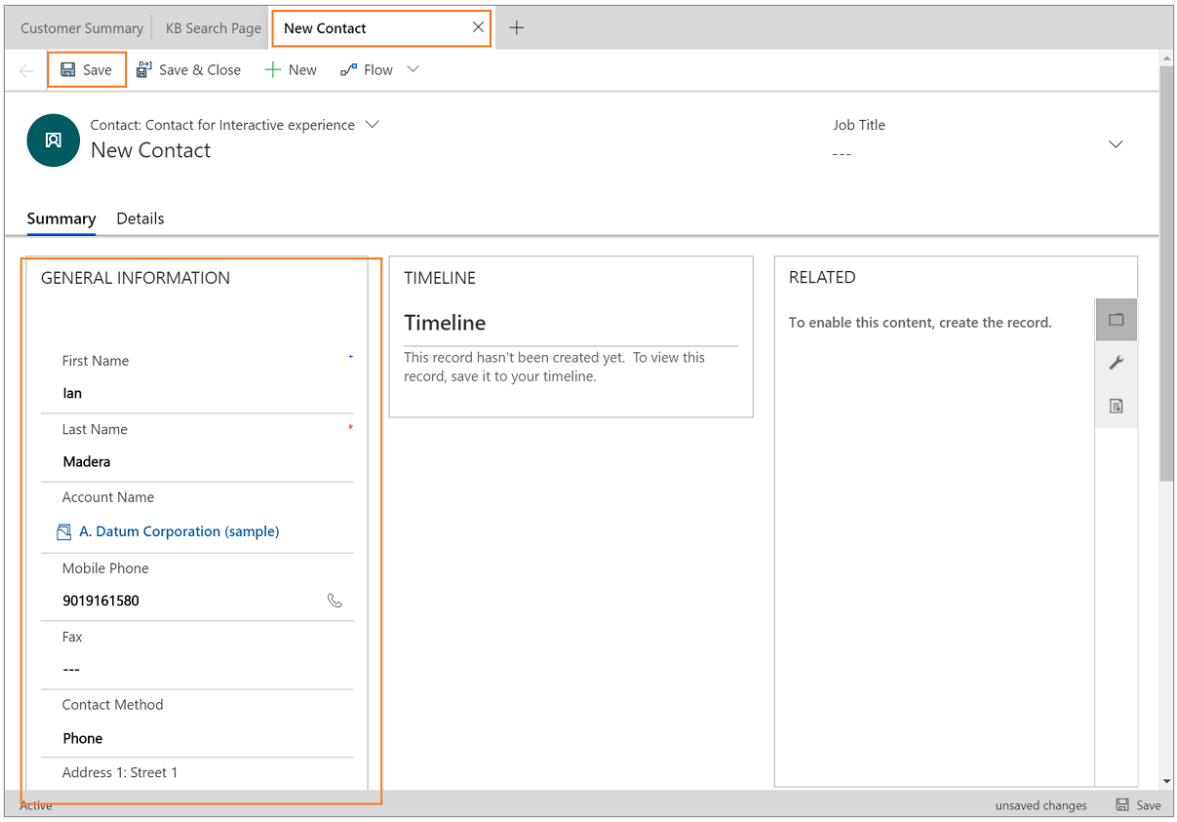
1. Select an option in the Customer or Case section based on the record you want to create. After you select the option, a form opens in an application tab panel.

Option	Section	Description
New Account	Customer	Select this option to create a new account record
New Contact	Customer	Select this option to create a new contact record
New Case	Case	Select this option to create a new case record



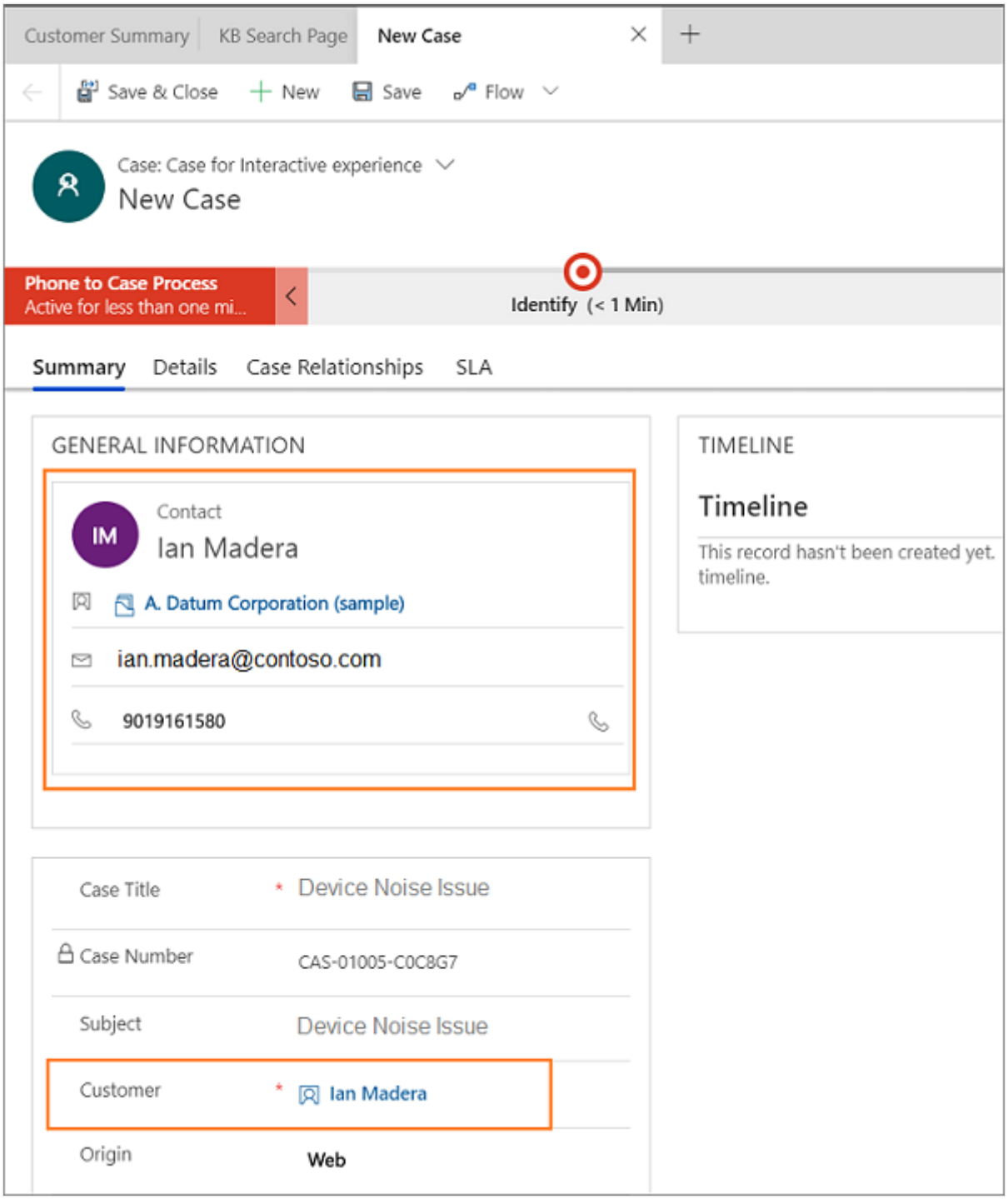
2. Specify the details in the form fields.

3. Select **Save**.



After you save, the record is automatically linked to the conversation. When you switch to the **Active Conversation** page, you can view the auto-linked record.

If you create the account or contact first and then start to create a case record, the case form shows the linked customer name in the **Customer** field.



Create a record using the Quick Create option

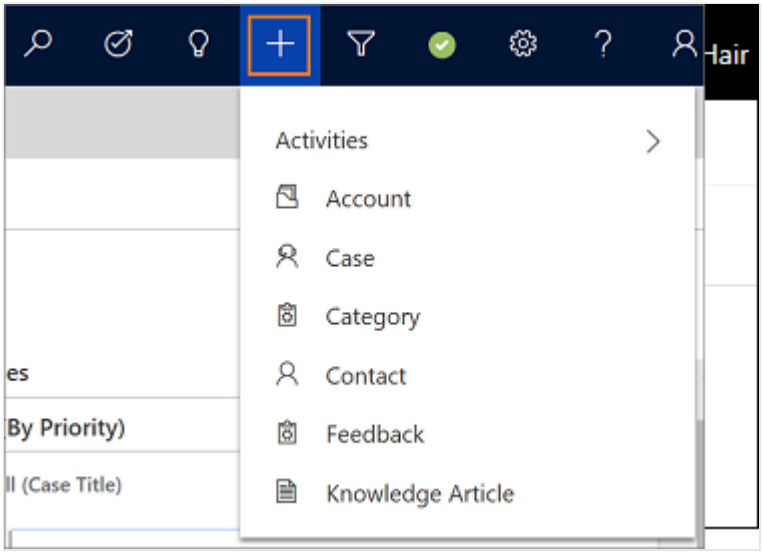
Use the quick create (+) option in the nav bar to create a record. After creating the record, you must manually search and link the record to the conversation.

To create a record

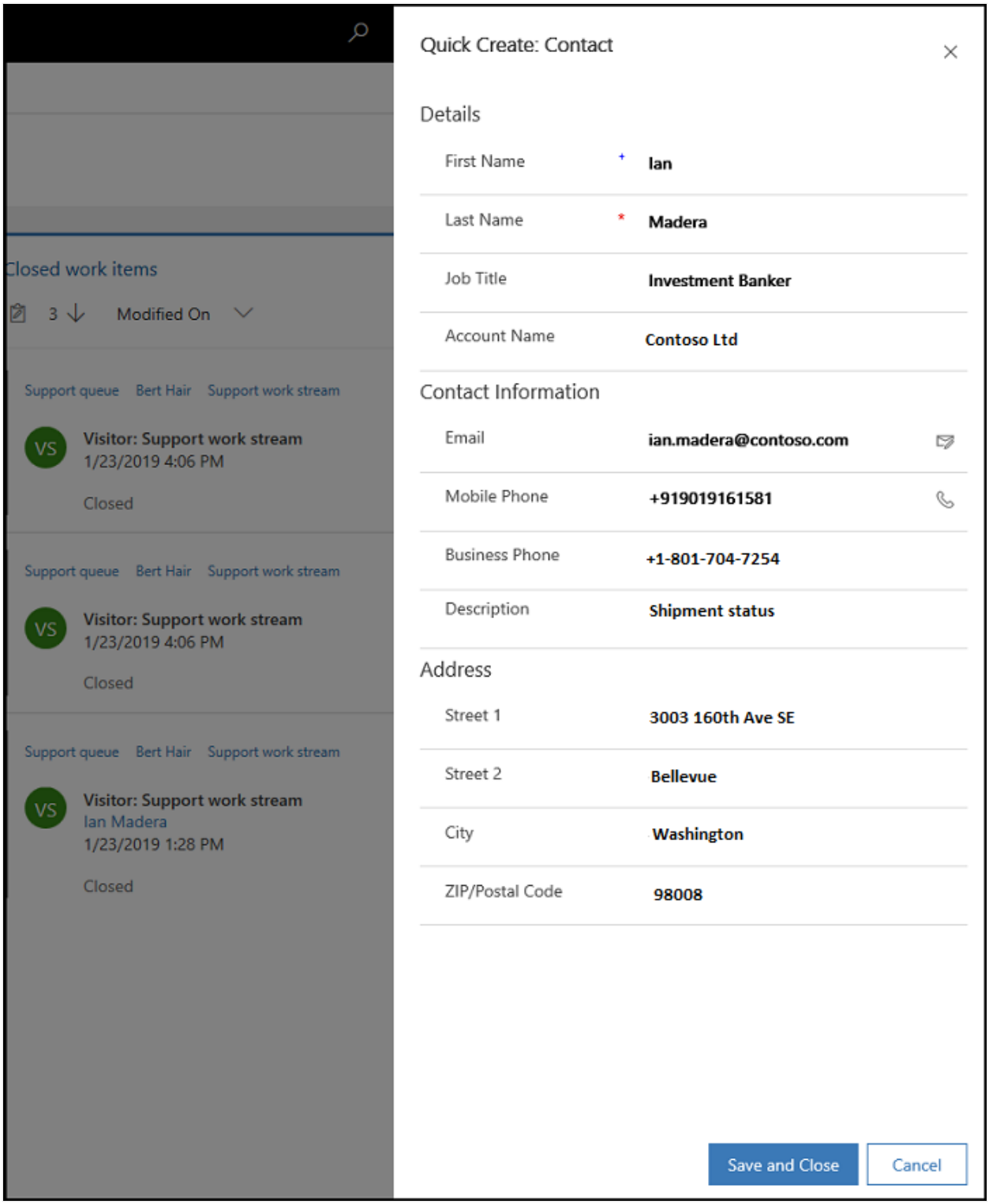
1. Select the + icon to create a record.
2. Select a record type from the list:

- Case

- Contact
- Account



3. In the left pane, you can see a new record page. Specify the details in the form.
4. Select **Save and Close** to save the changes and close the form.



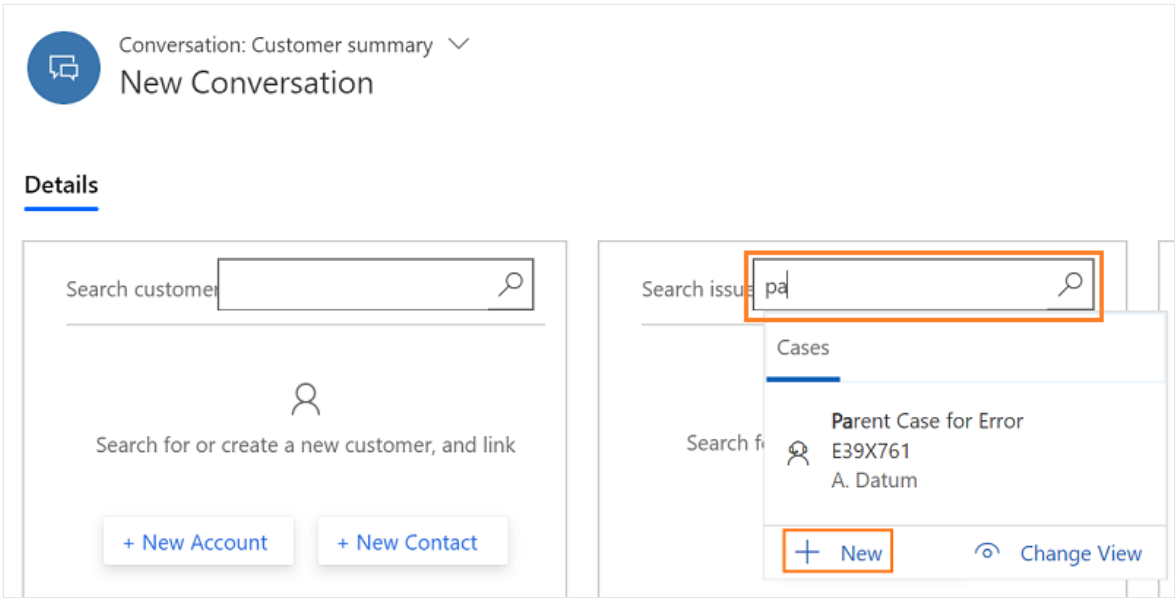
After you save the changes, you can link the record to the conversation. To learn more, see Search and link a record to the conversation

Create a record using the New option

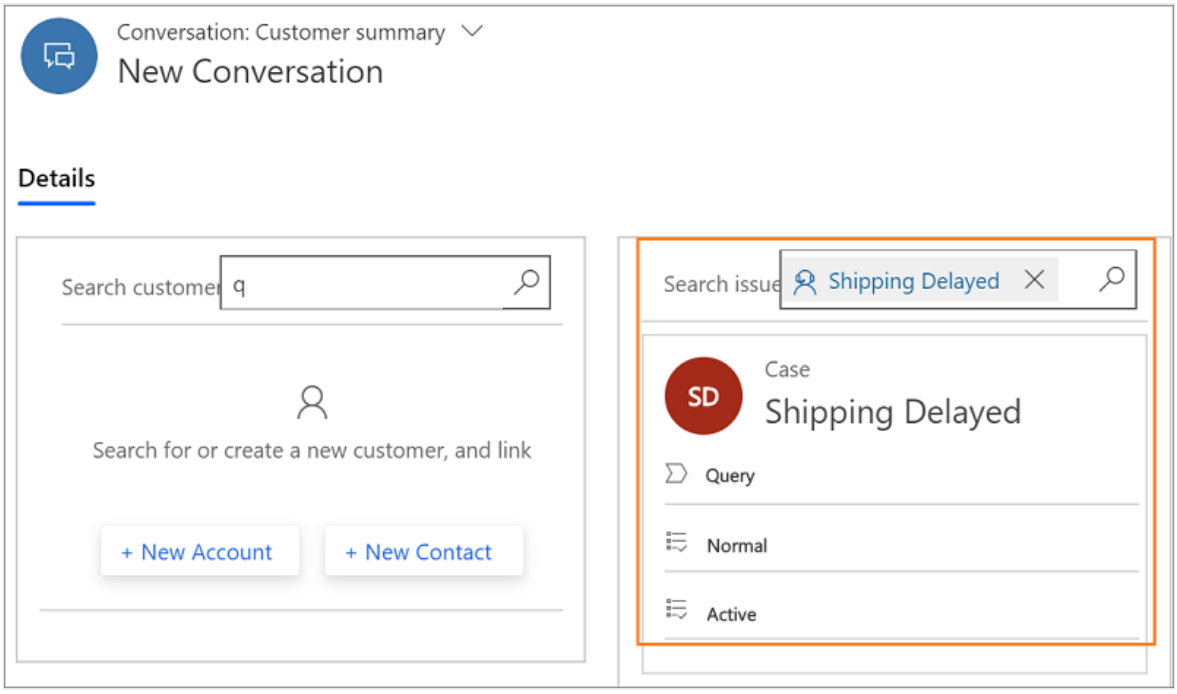
In the **Active Conversation** page, when you are trying to search a record in customer or case section, after you type few characters to search, you can use the inline **New** button to create a record. After you select the button, the **Quick Create** pane of the record appears.

1. Type to search in the search box. The records appear as a list that matches your search criteria.

2. Select **New** below the list of records. The **Quick Create** pane appears.



3. Fill in the form and select **Save and Close**. The **Quick Create** pane closes and the **Active Conversation** page refreshes. The record you created is auto-linked in the customer or case section.



See also

- Search, link, and unlink a record
- View customer information on Active Conversation form
- View conversation and session activity types in the model-driven apps

- View active conversations for an incoming conversation request

Search, link, and unlink a record in Omnichannel for Customer Service

Article • 06/09/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The topic explains how to search for records, link a record to a conversation, and unlink the record from the conversation in Omnichannel for Customer Service.

You can search for records in two ways:

- Inline search
- Relevance search

Search for records by using the inline search option

When you accept an incoming conversation request and there's no customer record identified in Omnichannel for Customer Service, use the inline search option in the customer (**Contact** or **Account**) section and **Case** section to search for a contact or account and case, respectively. Inline search is based on the Lookup View and Quick Find View. You can search the fields (attributes) that are included in the Lookup View and Quick Find View fields.

For the customer (**Contact** or **Account**) section, you can search for a Contact or Account record. By default, you can search by using the following fields.

Record	Fields
Account	• Account Name • Account Number • Email • Main Phone

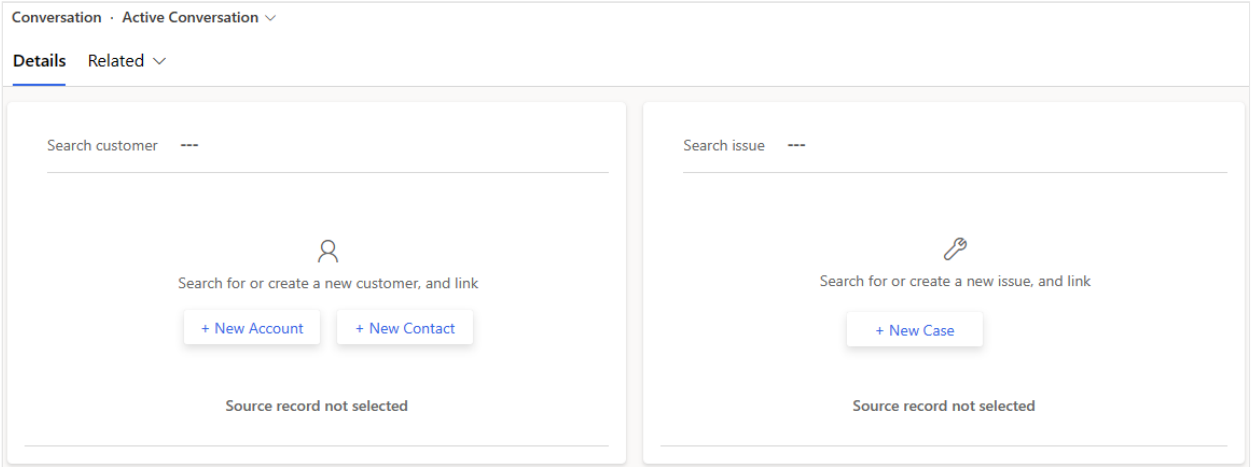
Record	Fields
Contact	• Company Name • Email • First Name • Last Name • Middle Name • Full Name • Mobile Phone

For the **Case** section, you can search for a Case (Incident) record. By default, you can search by using the following fields.

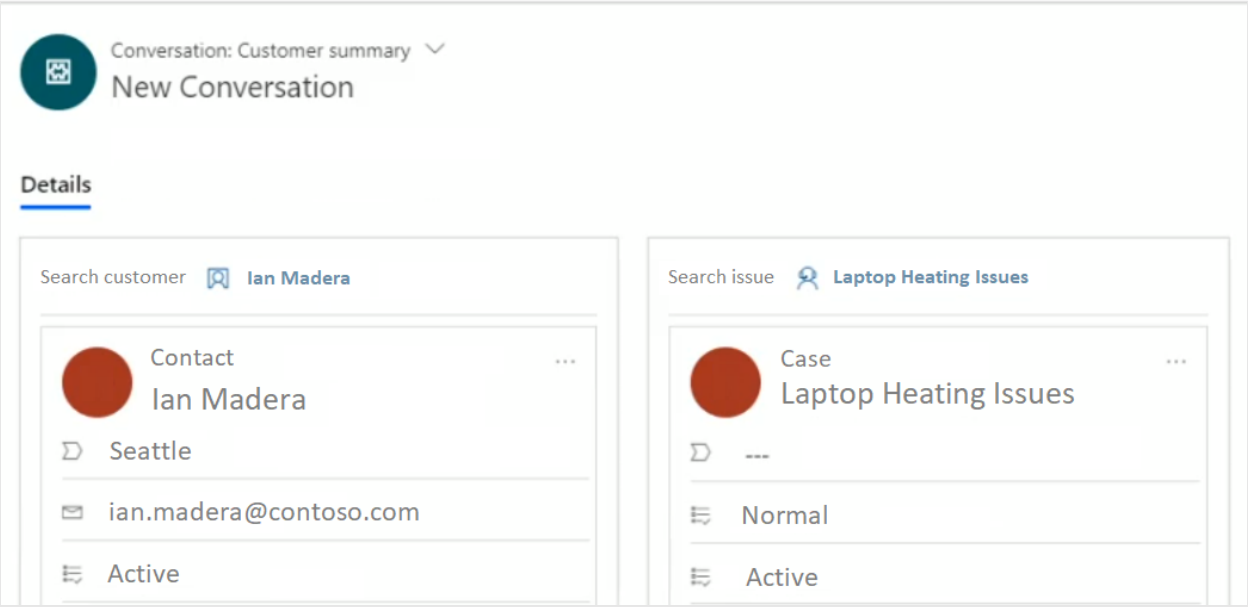
Record	Fields
Case	• Case Number • Case Title

Active views only are displayed for the search results. You can customize the Quick Find View and Lookup View to change the search fields based on your business requirements. More information: Understand views and Unified Interface Lookup view leverages Quick Find View

Link a record to the conversation when doing an inline search



During an inline search, the search results are displayed and you can select a record to link the conversation to the selected record. After you link the record, the **Active Conversation** page is updated with the details.



You can link one contact or account only in the customer (**Contact** or **Account**) section and one case in the **Case** section.

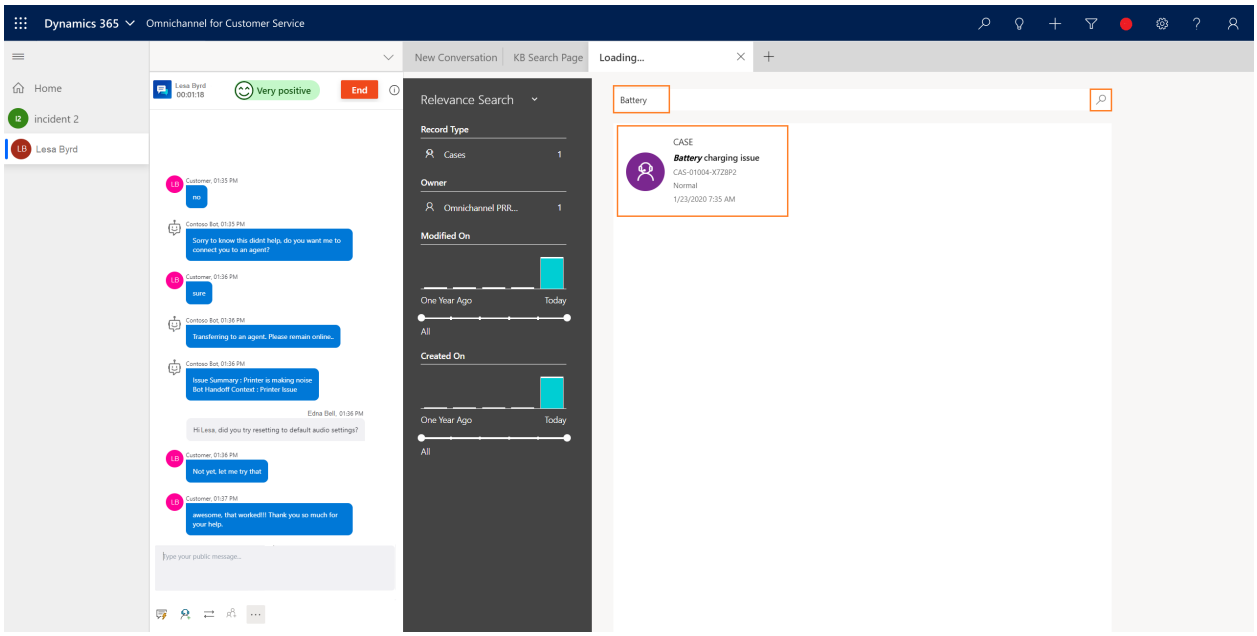
If you close a linked conversation, the case won't be closed automatically.

Search for records by using relevance search

You can also search for records by using the relevance search option. When you select the search icon, the search page opens in the application tab. Specify the details for your search, and then select the search icon. The results appear in a list.

You can search for a case, account, contact, and associated fields as enabled by your administrator.

1. Select **Search** . The **Relevance Search** tab opens.
2. In the search box, specify the entity or attribute details based on your search requirements, and then select **Search** .



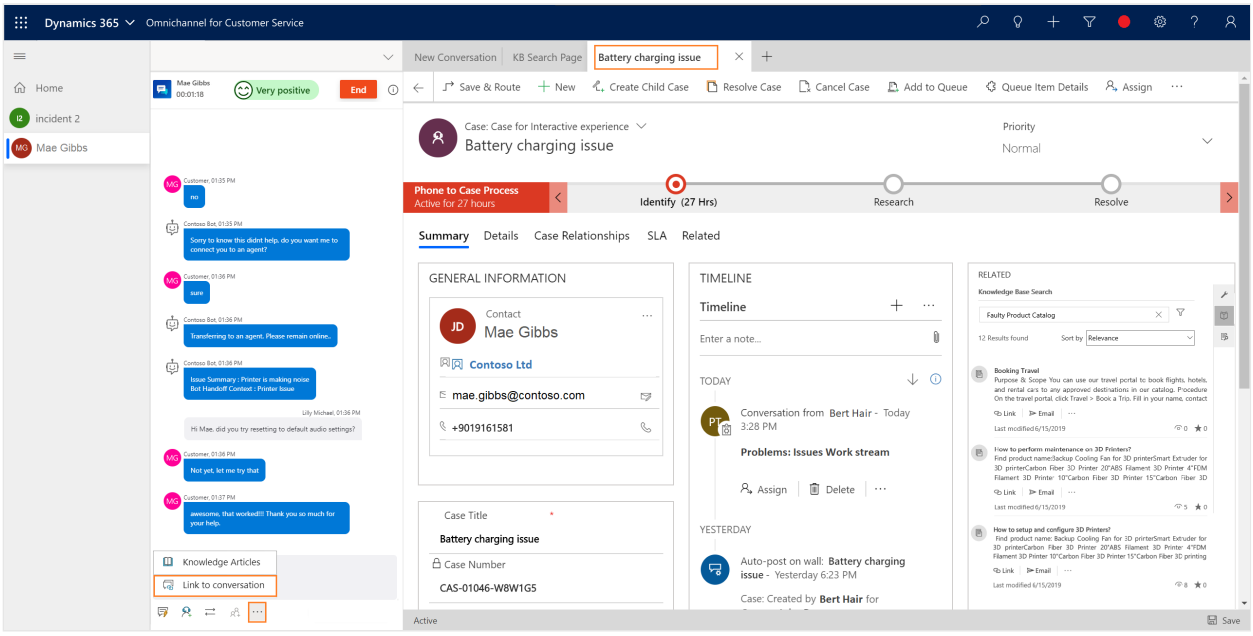
Link a record to the conversation when doing relevance search

After you search for a record by using relevance search, you can link the record to the conversation from the communication panel.

You can link one record only to a conversation.

1. Select the record from the list of search results. The record opens in the application tab.

2. Select **More options** in the communication panel, and then select **Link to conversation**.

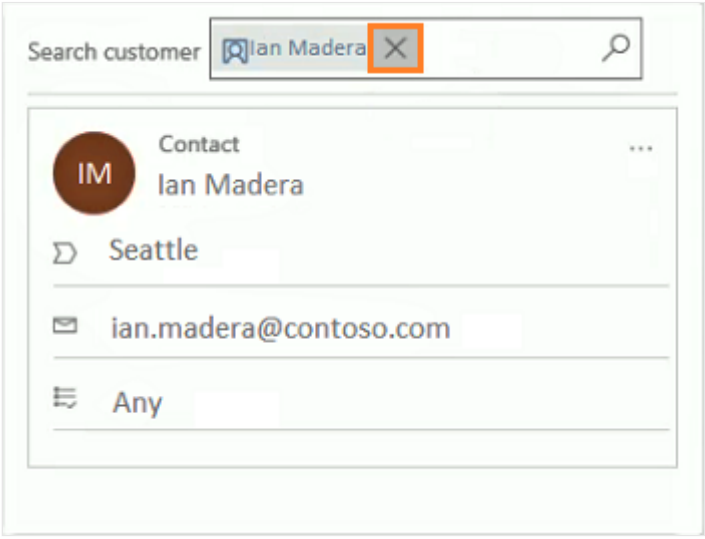


Now, the **Active Conversation** page is refreshed and updated with details from the record. Similarly, you can link other record types.

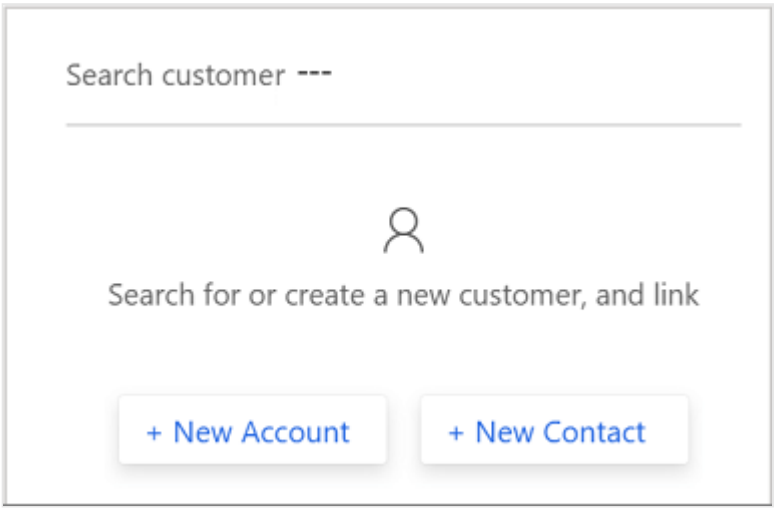
You can link and unlink one contact or account only in the customer (**Contact** or **Account**) section and one case in the **Case** section.

Unlink a record from the conversation

You can unlink a record only when you are interacting with a customer by using the communication panel. That is, after you accept an incoming conversation request and view the **Active Conversation** page, you can unlink the record from the conversation.



To unlink a record, select **Close** next to the customer name in the customer (**Contact** or **Account**) section. After the record is removed, the customer (**Contact** or **Account**) section is blank.



See also

- Understand conversation states

- View customer information on Active Conversation form
- View conversation and session activity types in the model-driven apps
- View active conversations for an incoming conversation request
- Create a record

Take notes specific to conversation

Article • 04/05/2023

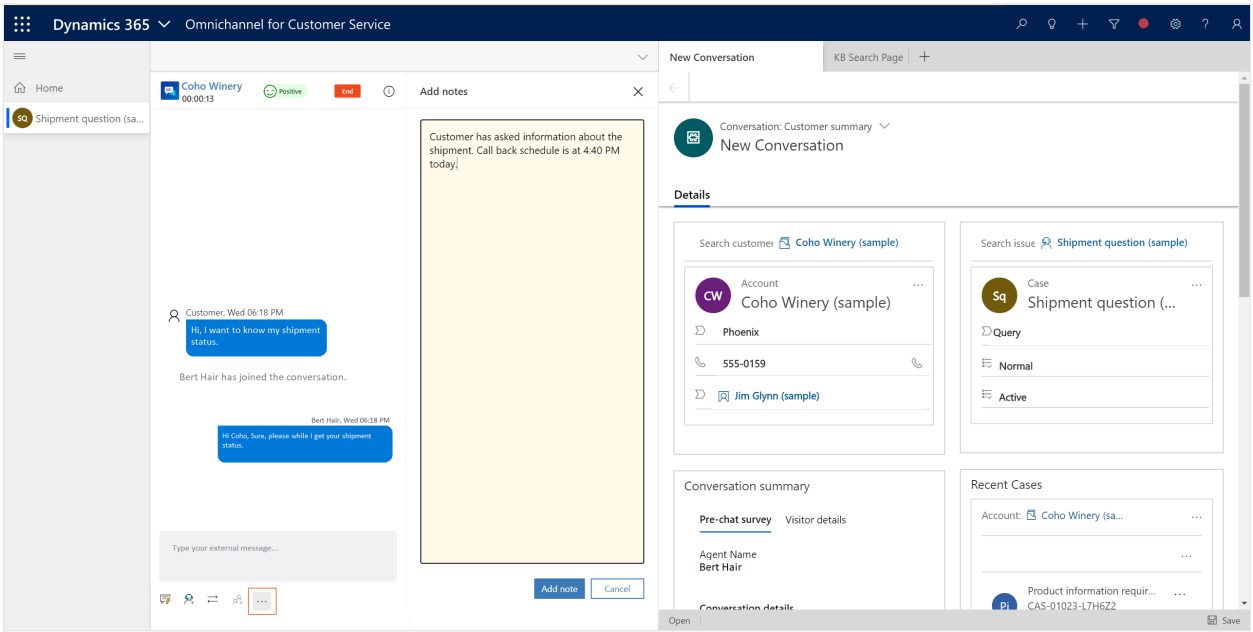
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Take notes

The communication panel allows you to capture information specific to the conversation when you interact with the customers. Use the notes option in the communication panel or the shortcut key to launch the notes.

For an unauthenticated conversation request, you can capture notes only when you link the contact to the conversation. That is, when the contact is either not present in the Omnichannel system or not identified, you cannot take notes unless you link to a conversation.

When you select the notes option from the communication panel, the application launches the notes panel next to the communication panel. You can capture the points and select **Add**. The notes are linked to the conversation for you to access at a later point. You can view the notes activity in the **Recent activities** timeline.



Take notes for multiple sessions

When you're working on multiple customer sessions, and while capturing notes, you might switch the session. In this scenario, even though you did not add the notes, the notes are saved, and **Recent activities** timeline is updated.

Again, when you switch back to the session, launch the notes panel and take the notes. After you add the notes, these notes are appended to the previously added notes in the timeline.

See also

- View conversation and session activity types in the model-driven apps
- View Communication panel
- Monitor real-time customer sentiment
- View customer information on Active Conversation form
- View active conversations for an incoming conversation request
- Create a record
- Search, link, and unlink a record

Call options and visual engagement in live chat

Article • 02/02/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Call options in live chat

With calling options in a live chat conversation, you can start a voice or video call while you're communicating with the customer over chat.

As an agent, you exchange a lot of information when you communicate with a customer via chat. This can slow down your effort to resolve the customer's issue. The customer might prefer to show you the problem and explain the issue by using a physical product. In these scenarios, you might want to initiate a voice or video call during the chat conversation to resolve the issue quickly. The calling options in the communication panel help you to easily make these calls.

Advantages of voice and video call in live chat

With calling options in live chat, you can:

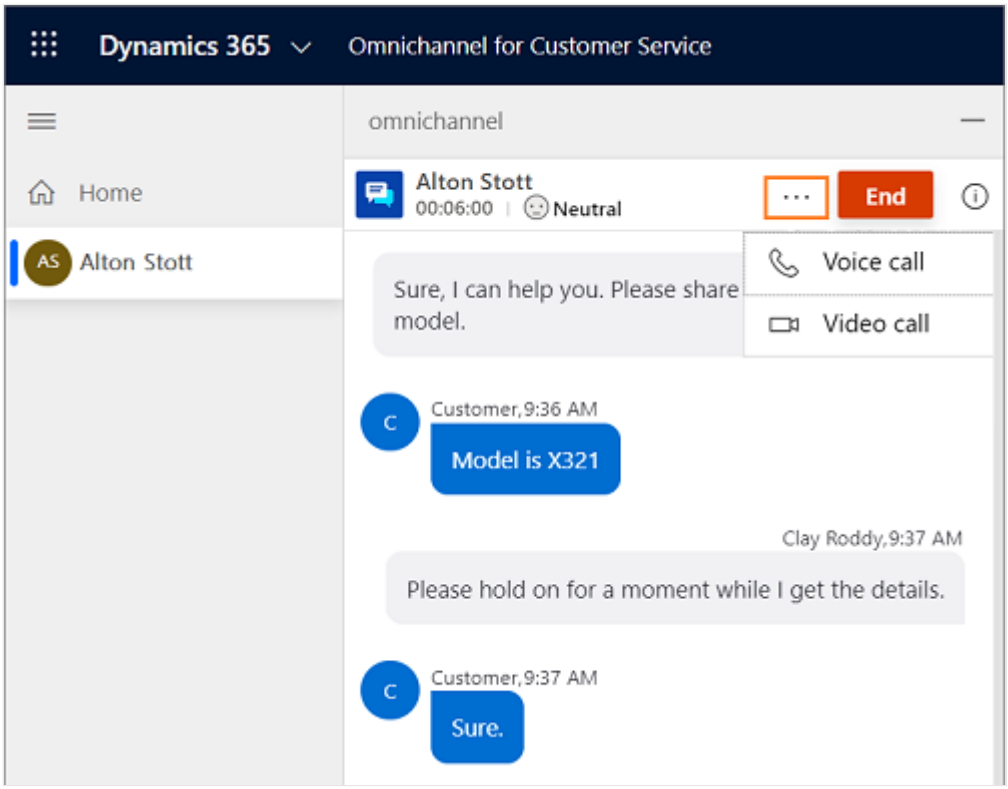
- Resolve customer issues quickly.
- Reduce your average handling time (AHT) and improve your productivity.
- Improve customer satisfaction.
- Develop a positive relationship with customers.

Prerequisites

You'll need network connectivity and a web browser. For supported browsers and required Internet bandwidth, see System requirements.

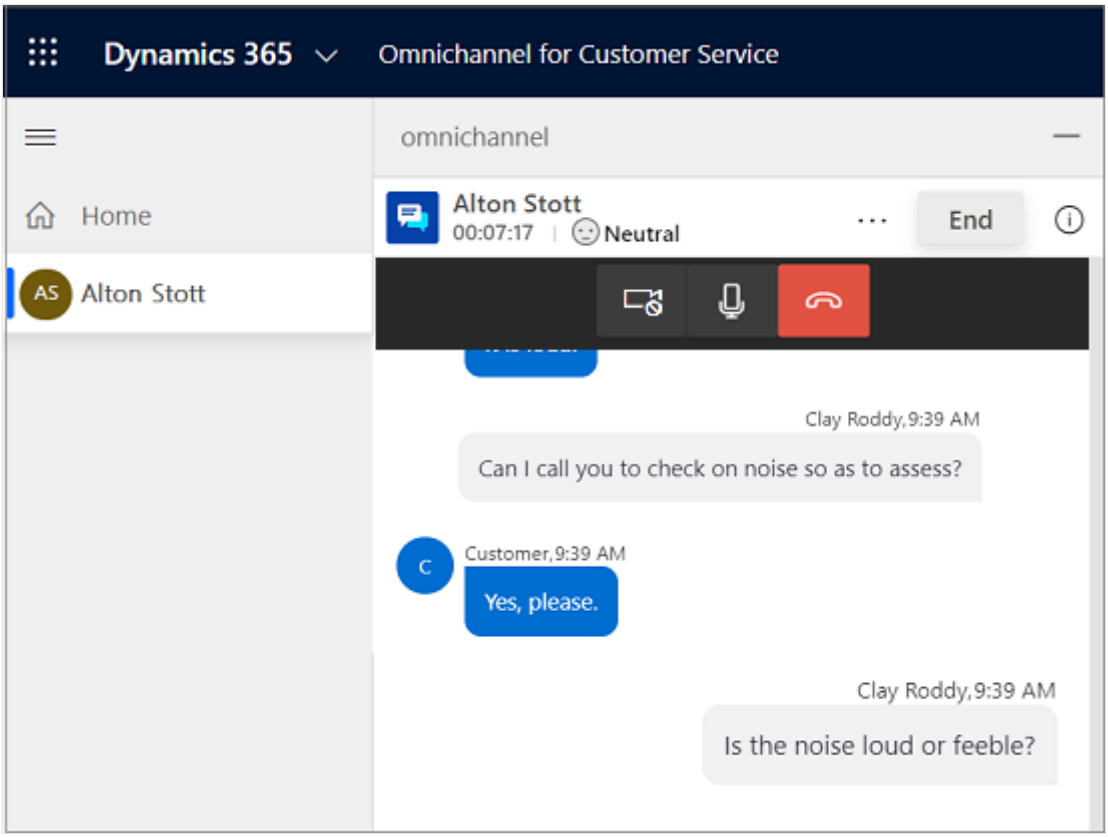
Initiate voice and video call

When you're chatting with the customer, you can start a voice or video call. In the communication panel, beside the **End** button, select More commands ···. The **Voice Call** and **Video Call** options are displayed. (Depending on your system configuration, you might see **Voice Call** and **Video Call**, or just **Voice call**.)



When you start a voice call, you can view the flyout call control, which includes the following buttons.

Button	Name	Description
	Turn on video / Turn off video	Use this button to turn on or off the video while in a call with the customer.
	Mute / Unmute	Use this button to mute or unmute the call while in a call with the customer.
	End call	Use this button to end the call.



> **Note**
>
> If your organization is in the Government Community Cloud (GCC) region, the audio and video calls will be transmitted via a North American data center.

Capacity of the agent

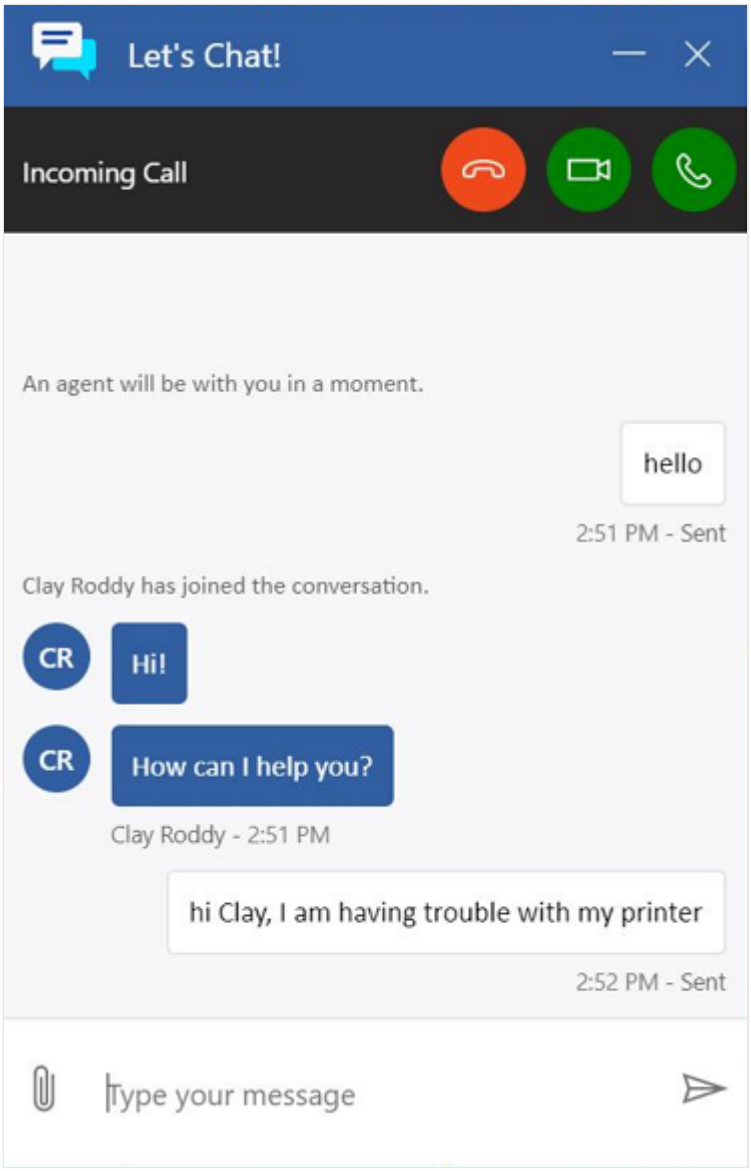
When you start a voice or video call, your capacity is consumed, and you can't take any conversation requests until you hang up. However, your supervisor can still assign conversations to you.

Site permissions

As an agent, you need to enable camera and microphone access in the browser to make a video and audio call, respectively.

Customer experience

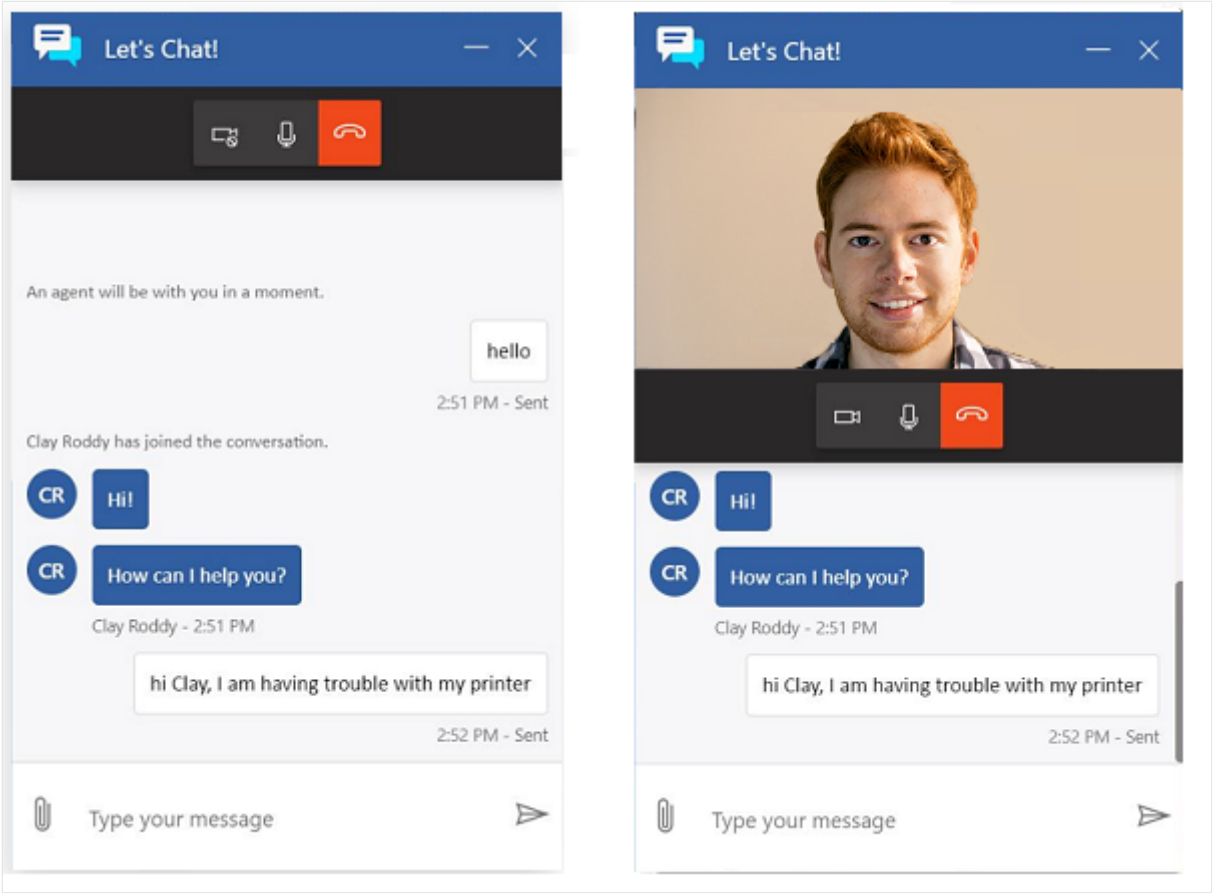
When a customer on the portal receives a call, they can accept the voice call with audio, accept the voice call with video, or reject the call.



After accepting the call, the customers can view and use the following options.

Button	Name
	Turn on video / Turn off video
	Mute / Unmute
	End call

After accepting the call, the customer can turn on or turn off the video, mute or unmute the conversation, and end the call.



Site permissions

Customers need to provide the camera and microphone access in the browser.

Co-browse and screen share in live chat

The co-browsing and screen sharing features help to quickly and easily understand the customer's issue when you communicate via the chat channel. These visual engagement channels allow agents to interact with customers within their browsers for a precise and effective support experience. This integration capability allows agents to start a third-party co-browse or screen sharing session from the chat conversation.

> **ⓘ Important**
>
> Third-party providers of co-browse or screen share capabilities may have separate pricing and licensing requirements. Before enabling and using these features through third-party applications, ensure you understand the terms of using these applications.

Prerequisite

To use the co-browsing and screen sharing features, your administrator must have selected a third party screen sharing and or co-browse provider. More information: Configure a chat widget

Initiate a co-browsing or screen sharing session

When you're chatting with a customer, you can initiate a co-browsing or screen sharing session by doing the following:

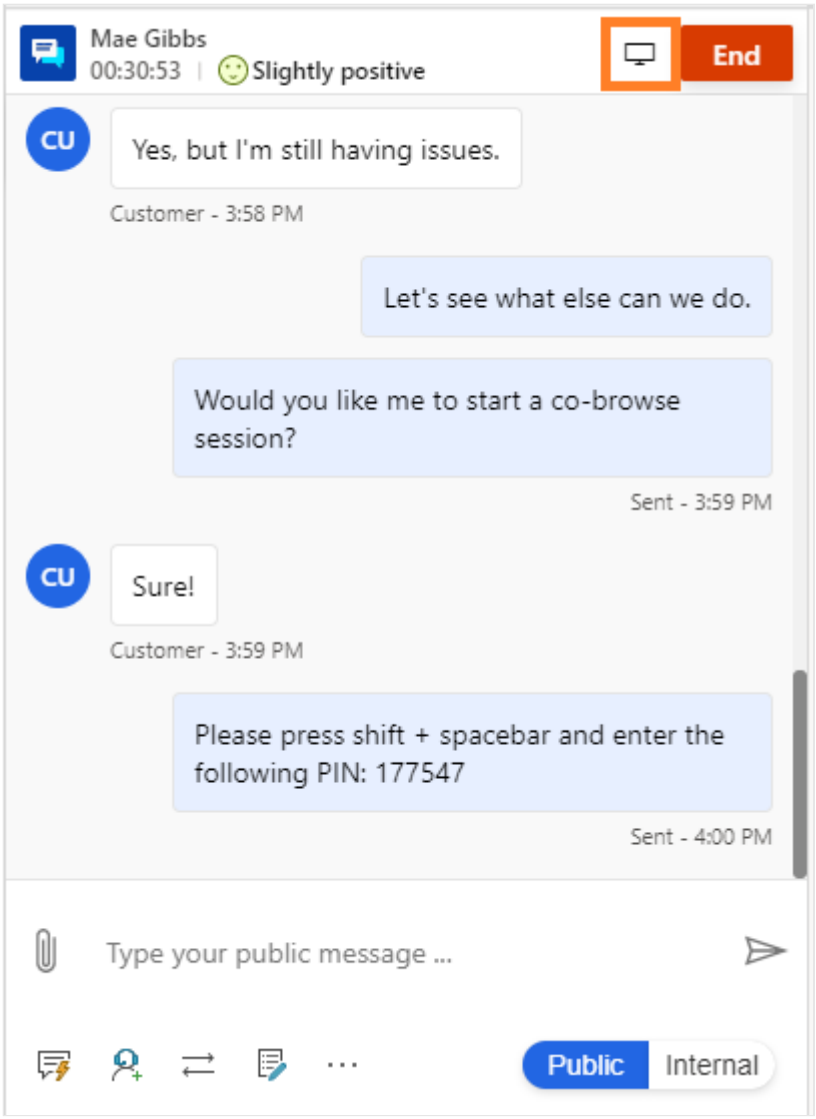
1. Select the computer icon (co-browse or screen share) next to the **End** button in the communication panel.

   An app tab opens, providing a way to sign in to the third-party provider and create a new session.

   > **Note**
   >
   > The sign-in experience will vary depending upon the co-browse or screen share provider selected by your administrator. For more information about co-browsing or screen sharing sessions, see the third-party provider's documentation.

2. In the communication panel, share the password or PIN with the customer that you received from the provider.

3. Ask the customer to enter the password or PIN, if applicable, and accept the invitation to co-browse or share their screen.



After the customer accepts your invitation, you'll be able to see the customer's screen and more accurately diagnose the issue.

When you enter a co-browse session, you can:

- See the customer's screen.
- Use a laser pointer to call attention to important items.
- Navigate and make changes within the customer's browser.

When you enter a screen sharing session, you can:

- See the customer's screen.
- Use a laser pointer to call attention to important items.

The customer experience will vary depending upon the co-browse or screen share provider selected by your administrator.

See also

Add a chat widget

Monitor real-time customer sentiment

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

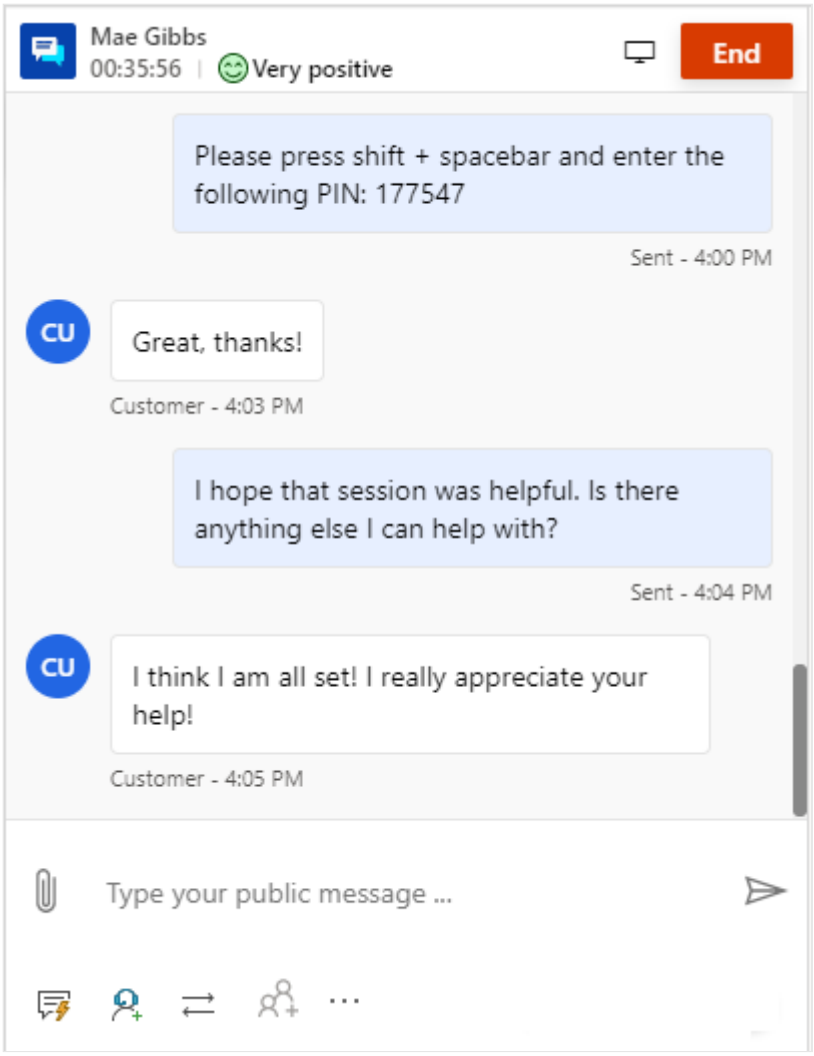
As an agent, when you interact with your customers, you want to know the sentiments they're experiencing in real time. Analysis of the customer's satisfaction level helps you understand how serious the problem is and develop a course of action to solve it. In Omnichannel for Customer Service, you can see the customer's satisfaction levels instantly while you communicate with the customer.

View real-time customer sentiment

A customer's real-time sentiment is displayed at the top of the communication panel. The sentiment icon changes dynamically based on the six most recent customer messages sent to you.

When you get an incoming conversation request, you accept the request and communicate with the customer. By default, you see the neutral sentiment icon, which indicates that at this moment the customer satisfaction level is neutral. As you continue to communicate with the customer, the sentiment icon changes dynamically according to the conversation.

When a conversation is escalated from a bot, the sentiment icon you see is based on the previous messages exchanged between the customer and the bot.

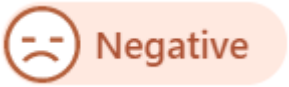
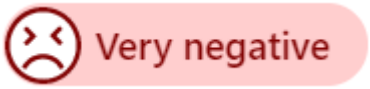


Understand real-time customer sentiment

The sentiment analysis is an automatic and unbiased measurement of customer satisfaction levels in real time.

The following sentiment icons are displayed on the communication panel.

Sentiment	Icon
Very positive	Very positive
Positive	Positive
Slightly positive	Slightly positi...
Neutral	Neutral

Sentiment	Icon
Slightly negative	
Negative	
Very negative	

> **Note**
>
> The real-time sentiment is shown to you only if the supervisor or administrator has enabled sentiment analysis for a queue where you've been added as a member.

If profanity is detected in English, the sentiment is displayed as **Negative** or **Very negative**.

Next topic: Manage presence status

Multi-language sentiment

Multi-language sentiment displays sentiment scores on some non-English conversations.

> **Note**
>
> Multi-language sentiment is available only if the administrator enables it for you.

To learn more, see multi-language sentiment.

Videos

Real-time sentiment analysis in Omnichannel for Customer Service
To view more videos on Omnichannel for Customer Service, see Videos.

See also

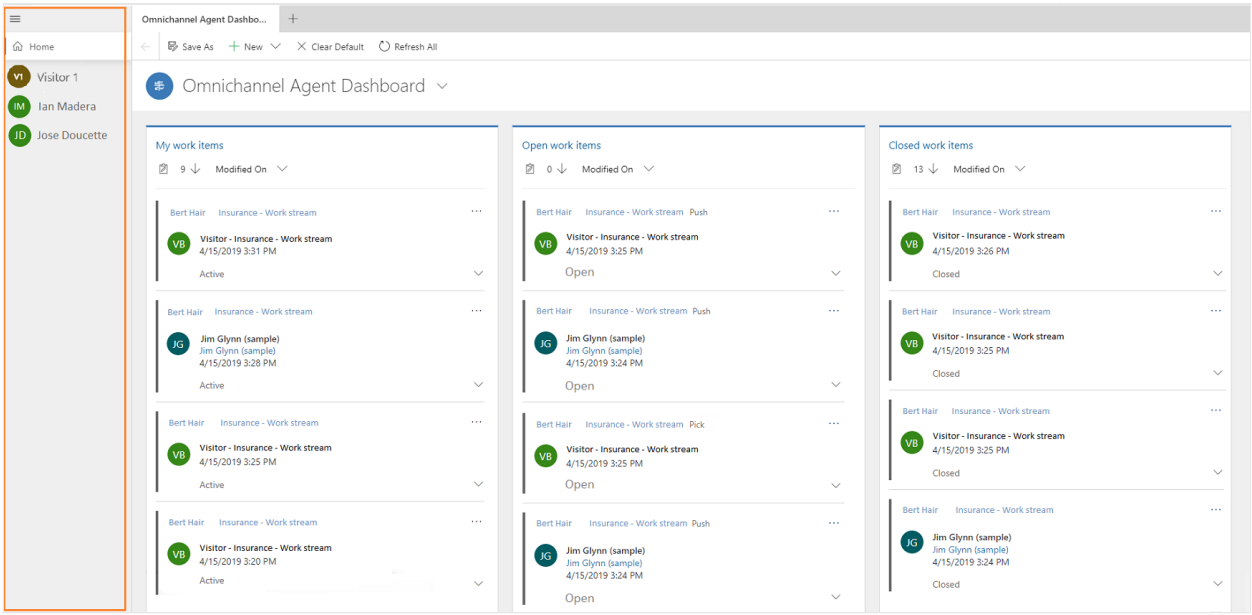
Introduction to the agent interface
Enable sentiment analysis
Manage sessions
Manage applications
View customer information on Active Conversation form
Search for and share knowledge articles
Take notes specific to a conversation
View active conversations for an incoming conversation request

Manage sessions in Omnichannel for Customer Service

Article • 08/19/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The vertical panel on the left side is the session panel that allows you (the agent) to work on multiple customer sessions simultaneously. As an agent, you can switch between sessions without losing context of the conversation and customer details. The ability to handle multiple sessions simultaneously (while preserving customer context) allows you to resolve issues faster and achieve higher productivity.



When a session is started:

- The presence status is updated as per the configuration set by your administrator.
- The Communication panel is displayed so you can interact and exchange messages with the customer.
- The **Active Conversation** page is loaded with the details of customer such as contact or account name, case, and conversation summary.
- The KB Search page opens in the app tab panel.

Start a session

As an agent, you can start the sessions in two ways:

- Manually start a session
- Automatically start a session using the incoming notification

When you start a session from a notification request that is a chat or SMS channel, the presence status is updated as per the configuration set for you by your administrator. In addition, the communication panel is displayed so you can communicate with the customer.

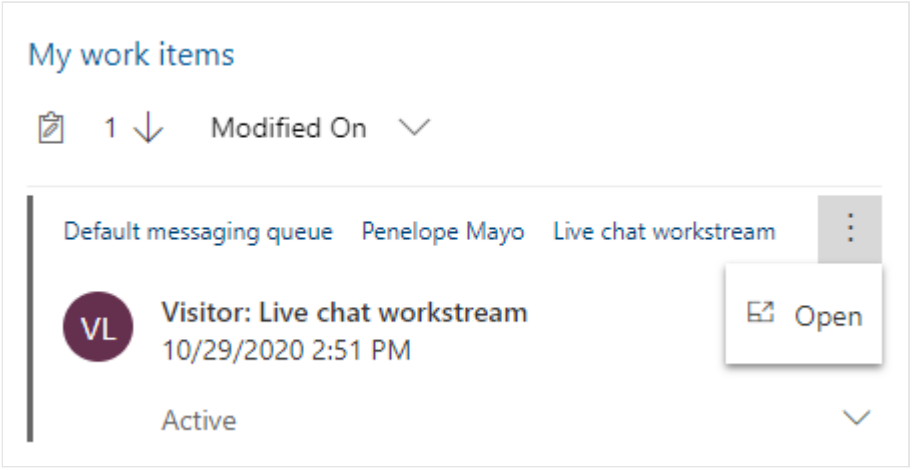
Manually start a session using the gestures

Contact and Case session

Use a combination of keyboard and mouse-click gesture to start a session. You can press **Shift** and select the work item to open a case or contact session. You can also select the **Open** option from the Omnichannel Agent Dashboard to start a case or contact session.

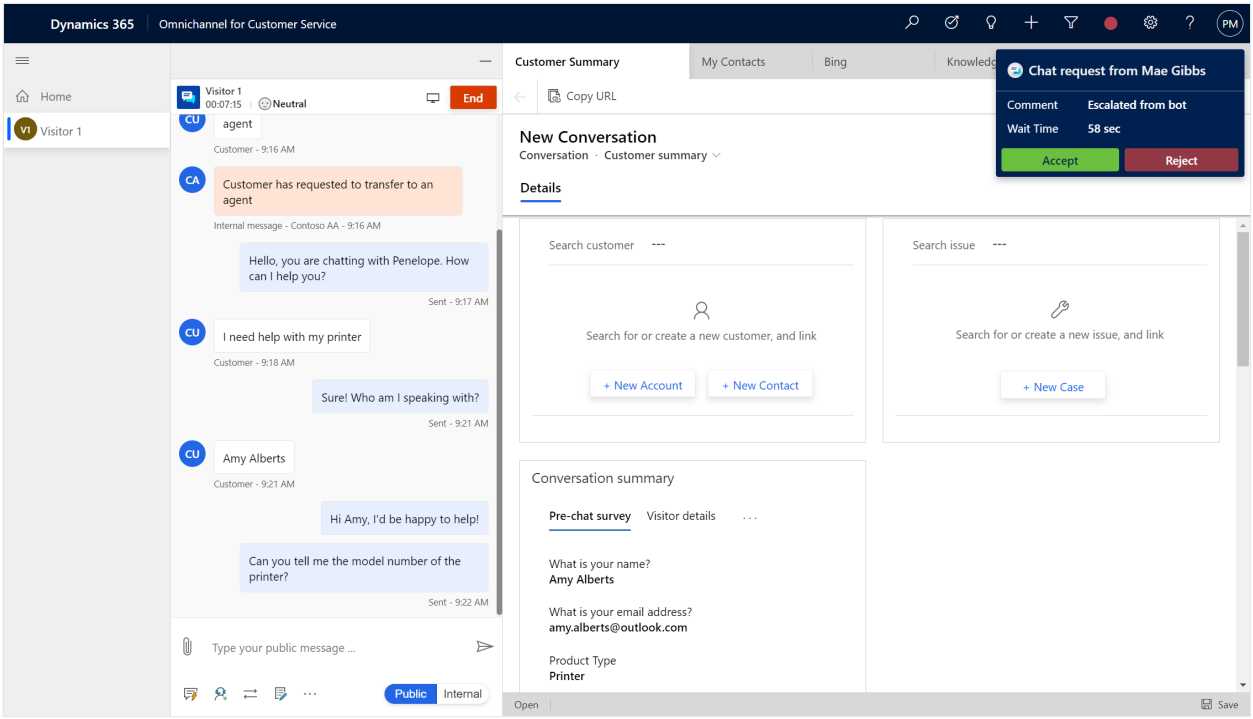
Channel session

You can start a session on a channel manually from the Omnichannel Agent Dashboard. Select **More options** (...) and select **Open** or **Pick** to start the session. The **Open** option is available for **My work items** and **Closed work items** streams. The **Pick** option is available in **Open work items** streams.



Automatically start a session using the incoming notification

When you accept an incoming conversation request by selecting the **Accept** button, a session is started and the **Active Conversation** page is loaded in the Unified Interface application area.



Work on multiple customer sessions

As an agent, when you are working on a case, you get an incoming conversation request, and you accept the request. This starts a new session and the **Active Conversation** page is loaded with context of the session. You can open applications such as KB Search, Open records, and any Line-of-Business applications made available in the application tab panel sitemap. You can open these applications using the gestures and the options in the communication panel. To learn more, see Manually start a session using the gestures and View communication panel.

When you switch sessions, unsaved changes are not lost and you can continue to work on them.

For example, you are working on a case by entering the title of the case and not yet saved the form. Now, you get a notification about the incoming conversation and you accept the request, which leads to starting of a new session. Again, you can switch back to case session and the data entered is present for you to continue.

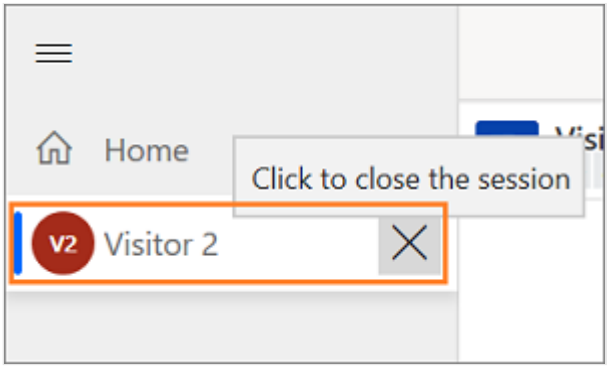
Persistent chat for agents

If your organization has chosen persistent chat as the mode of conversation, you should make sure of the following:

- You shouldn't end the conversation; instead, you should close the conversation so that it is moved into a waiting state, which is typically 28 days or the value that is configured in the workstream.
- You must confirm with the customer that their issue is resolved, and then end the session by selecting **End**. After you end the chat, the chat history will not be shown when the customer comes back; a fresh chat session is initiated instead.

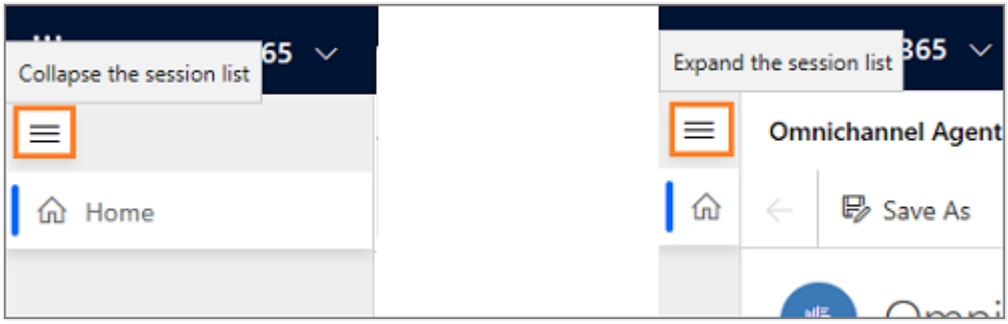
Close a session

You can close any session manually by selecting the **X** button next to the session title. When you hover the cursor on a session, you'll see the **X** button, and if you select the button, a confirmation dialog is shown to you.



Mode of the session panel

By default, the session panel is in expanded mode. Use the burger icon to toggle between expand or collapse mode. At all times, the **Home** session is anchored and you can't close it. The Home session shows the default dashboard set for you by your administrator.

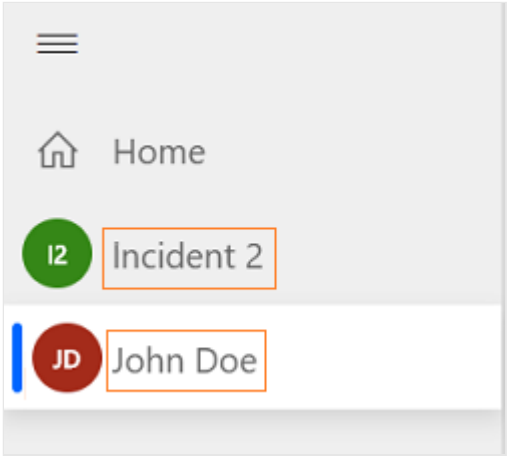


Title and icon of the session

- **Session title**

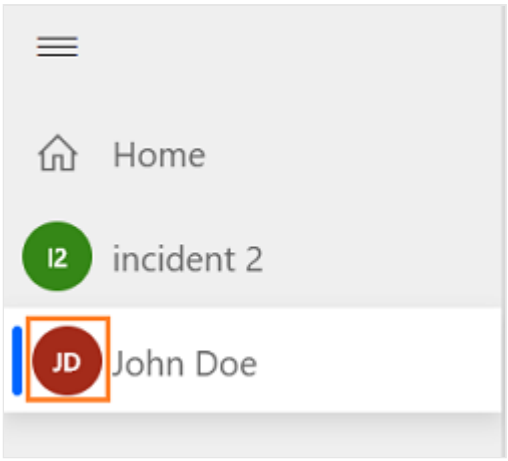
By default, the title of the session is the name of the customer, account, or title of the case. For an unauthenticated conversation request, the title will be displayed as visitor with a number. For example, **Visitor 1**.

For an authenticated chat, name of the contact, account, or title of the case is displayed.



- **Session icon**

  By default, the first two letters of the session title are displayed as the session icon.



Session sentiment alert and unread message count

- **Sentiment alert**

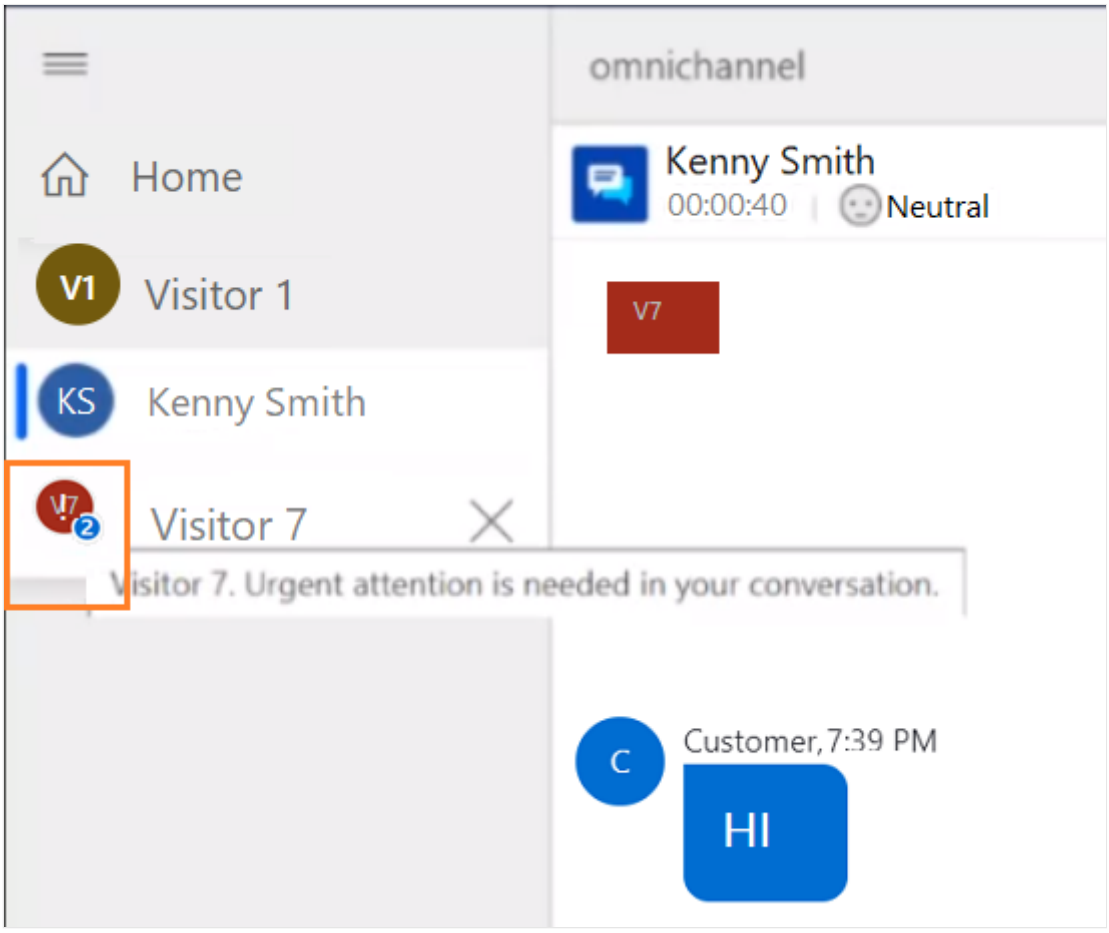
  When you are working on multiple customer sessions, there may be a scenario where a customer may not be happy. Since you are working simultaneously on multiple sessions, and if that session is not focused, you need a way to identify the sentiment of that session.

Session sentiment displays an alert to you when the sentiment reaches the threshold value as set by your administrator. For example, your administrator has set the threshold as **Slightly negative**. So, when the sentiment reaches **Slightly negative**, you can see an alert in the session panel on the session icon. An exclamation icon is displayed on top of the session icon to indicate that the requires your attention. When you hover the cursor on the session icon, you can see a tooltip, which displays a message in the following format:

<session title>. Urgent attention is needed in your conversation.

Example 1: **Visitor 7. Urgent attention is needed in your conversation.**

Example 2: **Kenny Smith. Urgent attention is needed in your conversation.**



- **Unread message count**

  When you're working on multiple customer sessions, there may be a scenario where you may receive many messages across different sessions. Since you are working simultaneously on multiple sessions, and if that session is focused, you need a way to identify the number of messages you received for a particular session.

  A count of unread messages is displayed on the session icon in the session panel. If the number of messages is 10 or more, then a plus icon (+) is displayed.

When you hover the cursor on the session icon, you'll see a tooltip that displays a message in the following format:

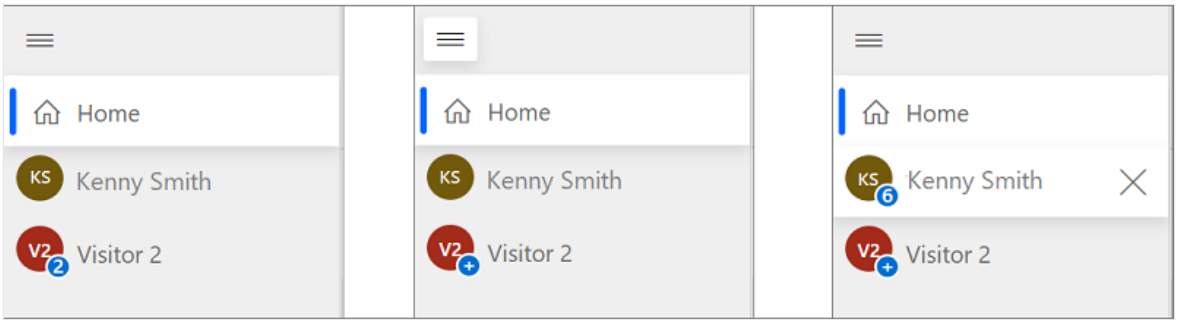
<session title>. <X> new updates in your conversation

X - count of unread messages

Example 1: **Visitor 7. 5 new updates in your conversation.**

Example 2: **Kenny Smith. 5 new updates in your conversation.**

When you select a session with unread messages, the session will be focused and the unread message count will disappear from the session icon.



See also

- Manage applications
- Understand conversation states
- View communication panel
- View agent dashboard and conversations (work items)

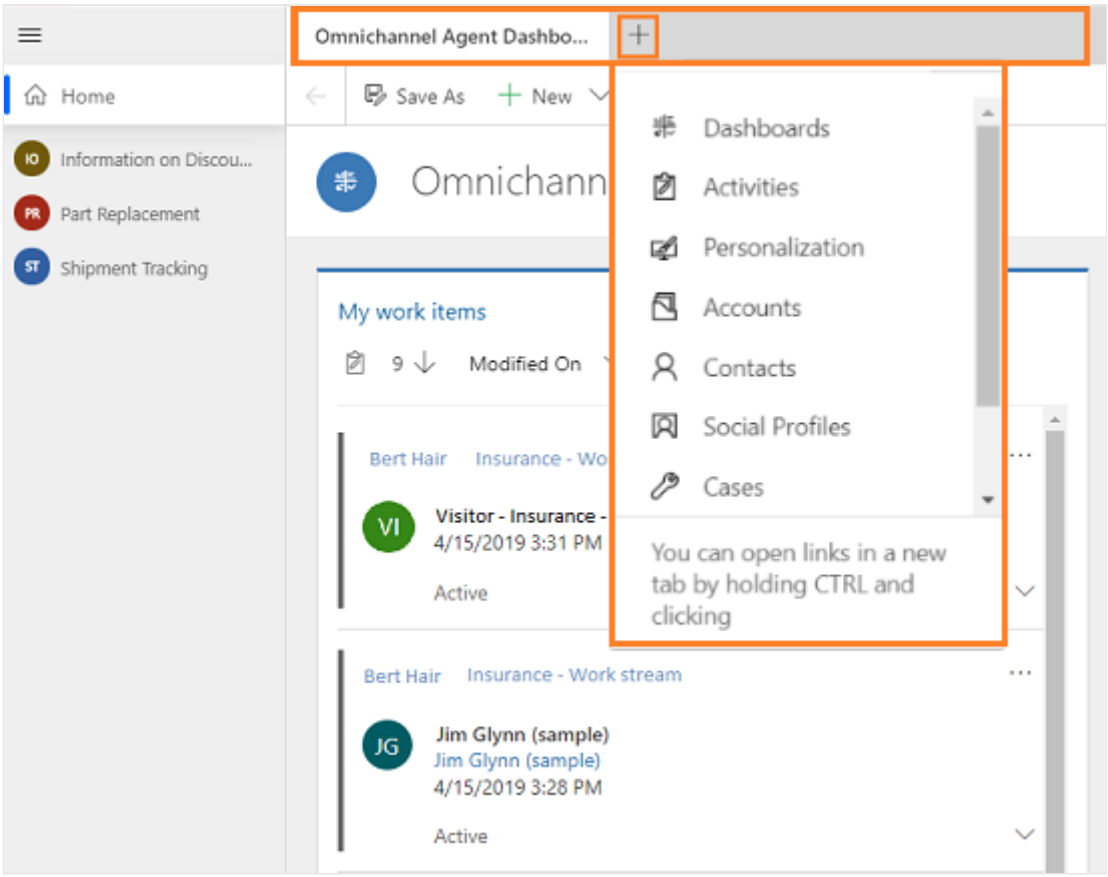
Manage applications in Omnichannel for Customer Service

Article • 08/19/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The horizontal bar below the navigation bar is called the application tab panel. Every customer session has at least one application that is not closable; it is called an **anchor** tab. In the following image, **Omnichannel Agent Dashboard** is the anchor tab.

The application tab has a + icon. If you select the icon, a menu appears that lists the out-of-the-box and custom entities. Also, you can access any third-party line-of-business applications that are extended within the Omnichannel for Customer Service app. Select the option from the list to open it in the application tab.



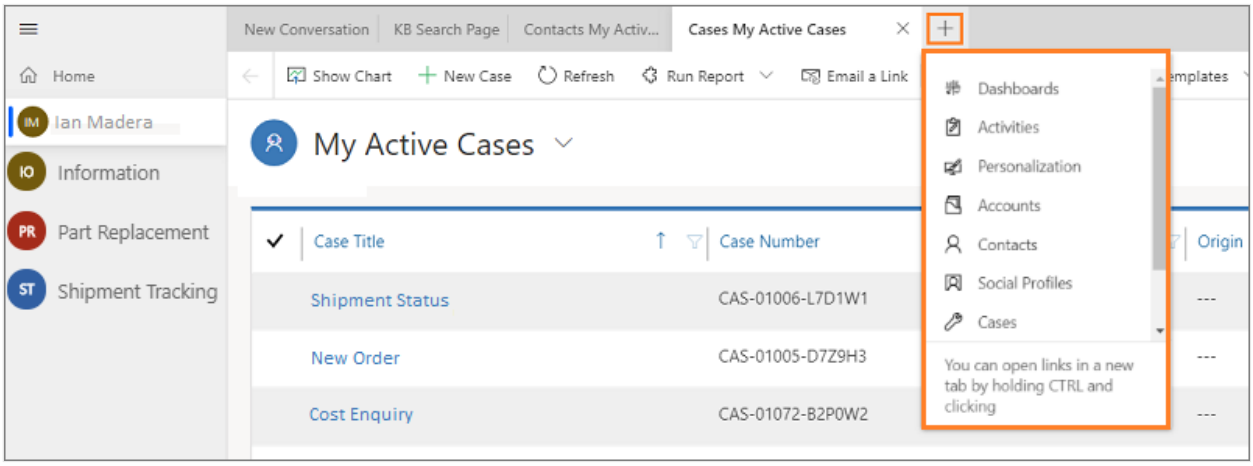
Open an application

You can open an application in the application tab panel in the following ways:

- Use the application tab menu.
- Use the **Ctrl + click** gesture.

Use the application tab menu

On the application tab panel, select + to view the menu that has a list of out-of-the-box and custom entities. Selecting an option from the menu opens the application in the application tab panel. The application opens in the current active session.



Use gesture (Ctrl + click) to open an application

Use a combination of keyboard and mouse-click gesture to start an application. You can press **Ctrl** and select a link to open it in a new application tab. The application opens in the current active session.

Work with applications

Every session has an application tab that is called the Anchor tab. A session can have a maximum of one Anchor tab and there is no close option on the application tab. When you are working on an Omnichannel conversation request, the **Active Conversation** page is the default anchor tab.

When you switch sessions or between applications in the current session, your unsaved changes are not lost and you can continue to work on them.

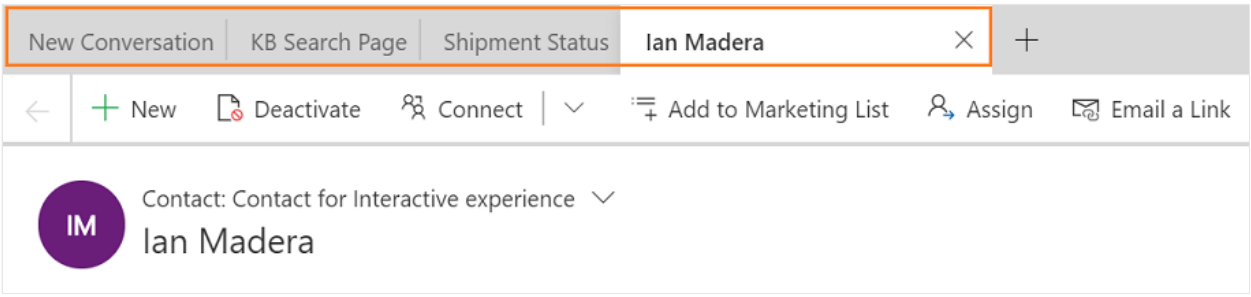
For example, you are working on a case by entering the title of the case. Before saving the form, you can open an account record in a new application tab. Now, the application focus changes to the account record. However, the unsaved changes are preserved for you to continue working on the form.

You can close an application tab manually by selecting the close icon on the application tab. After closing the application tab, the focus moves to the next available application tab on the left.

You can switch between applications by selecting the application tab title.

Title of the application tab

The title of the application tab is the name of the entity. For example, dashboard names, case, contact, account names, and so on. For third-party applications, the name appears as configured by your administrator.



See also

Create personal quick replies
View agent dashboard and conversations (work items)
Manage sessions
Understand conversation states
View communication panel

Personalize sound notification settings

Article • 05/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can personalize sound notification settings for incoming conversation requests using the personalization menu available on the application tab panel. The sound notifications are available across all channels and can also be set for messages for ongoing conversations.

Prerequisites

- You can personalize the sound notifications only when your administrator has enabled the corresponding setting. More information: Enable sound notifications
- Your browser should allow sounds to be played. In Microsoft Edge, sound is allowed by default. However, if for some reason, sound settings are turned off, you can enable them by going to the media autoplay setting in Microsoft Edge. For information on how to enable sound notifications for other browsers, see the browser-specific documentation.

Personalize sound notifications

The personalized settings have precedence over the administrator settings. You can enable notifications at each channel level for all the channels that are provisioned and available for you.

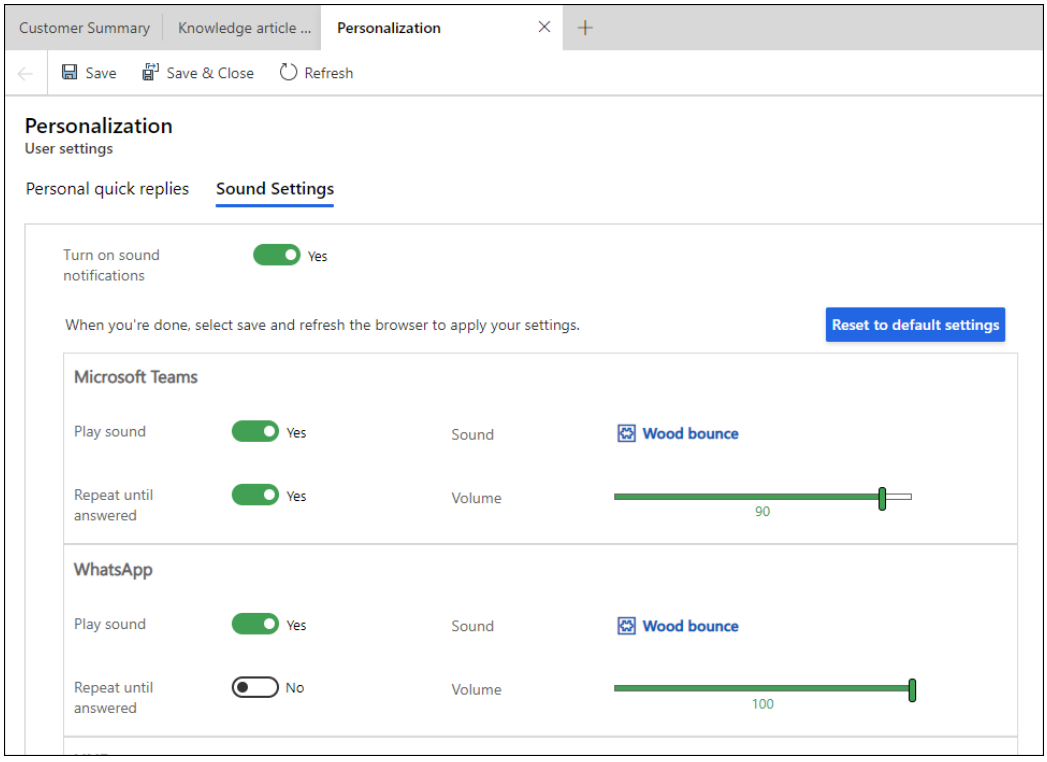
1. On the application tab panel, select the plus icon, and then select **Personalization**. The **Personalization User settings** page appears.

2. Select **Sound Settings**.

3. Personalize the following settings for the channels:

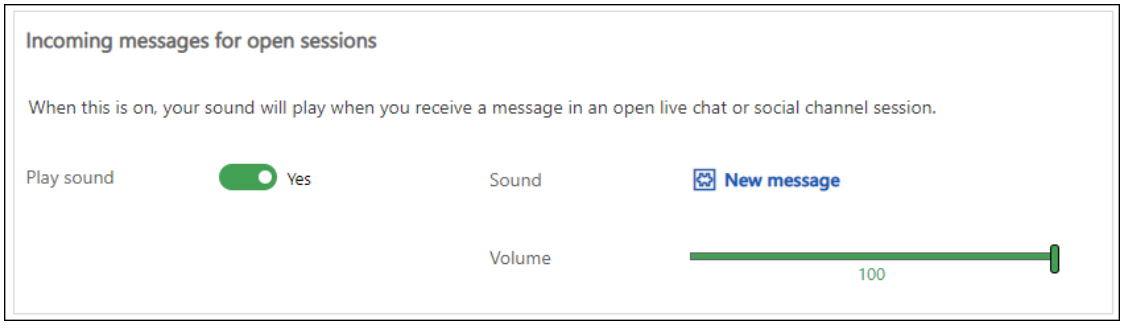
    - **Play Sound:** Set the toggle to **Yes**.

- **Repeat until answered:** Set the toggle to **Yes** if you want the sound to be played until you respond.
- **Sound:** Accept the default setting or search and select a different audio file. You can use the **New Audio File** option to upload and use an audio file of your choice. You also have the option to preview the audio.
- **Volume:** Accept the default setting or use the slider to adjust the volume.



- **Reset to default settings:** When you customize any setting, the button is enabled for you to reset to the out-of-the-box settings.

4. In the **Incoming messages for open sessions** section, customize the options for sound notifications for messages in open sessions, such as live chat or a social channel.



5. Select **Save**.

See also

View communication panel
View notifications

Create personal quick replies

Article • 11/17/2021

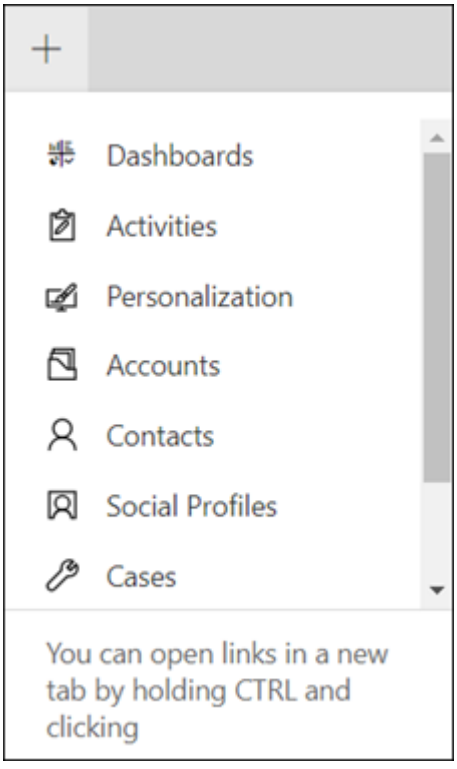
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can use the personalization menu that's accessible through the application tab to add *personal quick replies*, also called *predefined messages*. You can create quick replies for the common questions and scenarios that you need to address in your role. You can tag the replies with keywords that help you invoke the quick replies when you're interacting with customers.

Create personal quick replies

You can create, edit, and delete the personal quick replies you own. The quick replies that you create are available on the **Personal** tab in the **Quick replies** panel of the conversation window.

1. Sign in to Omnichannel for Customer Service, and on the home page, select the plus sign + on the application tab.

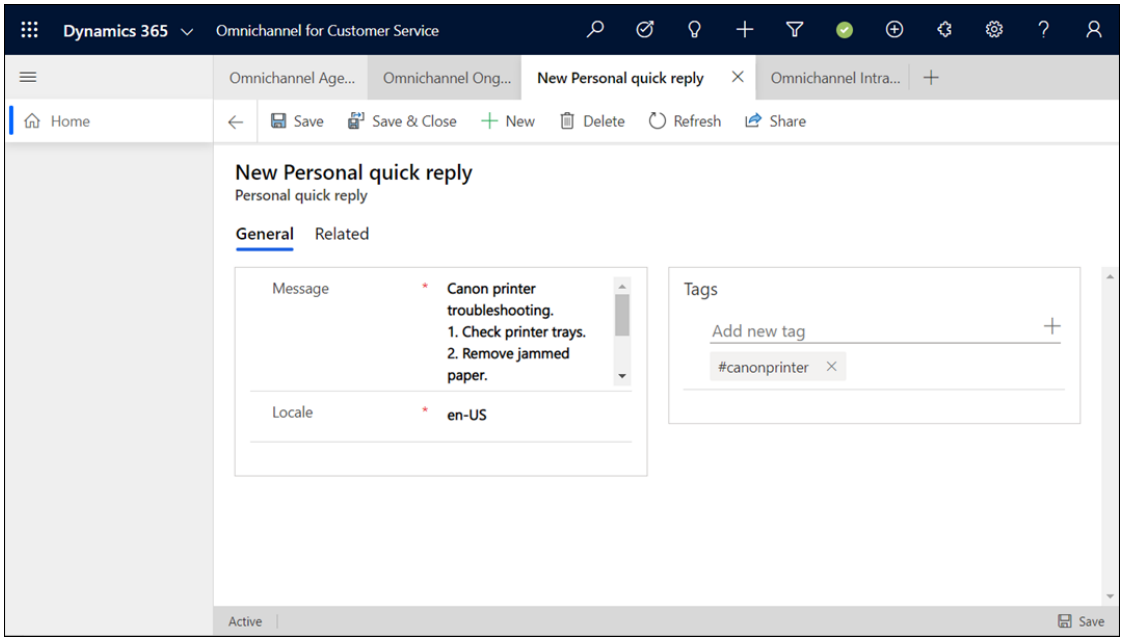


2. Select **Personalization**.

3. On the **Personal quick replies** tab, select **New Personal quick reply**, and do the following:

   - **Message:** Enter the text you want to use for your reply.
   - **Locale:** Select the language in which you want to create the quick reply.

   > **Note**
   > - To avoid duplicating quick replies, check the predefined messages before creating a personal quick reply.
   > - Personal quick replies aren't localized in Omnichannel for Customer Service. To provide quick responses in multiple languages, create a separate quick response record for each language and select its corresponding locale.



4. In the **Tags** area, enter the keyword you want to associate with the quick reply, and then select +. If you want to use the number sign (#), don't use it anywhere else in the keyword except at the beginning.

5. Select **Save**.

It can take up to 15 minutes for the quick replies to be available for your use.

For more information on personal quick replies, see Send quick replies.

See also

Send quick replies Manage applications

Manage presence status

Article • 07/12/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Presence is an indication of your availability or status in the application.

Prerequisites

For the presence status or presence icon to display correctly, enable in your browser for all modes.

View your presence status

You can view your presence status on the navigation bar. You can select the presence icon to launch the presence dialog and update your presence.

- Offline
- Appear away
- Do not disturb
- Busy
- Available

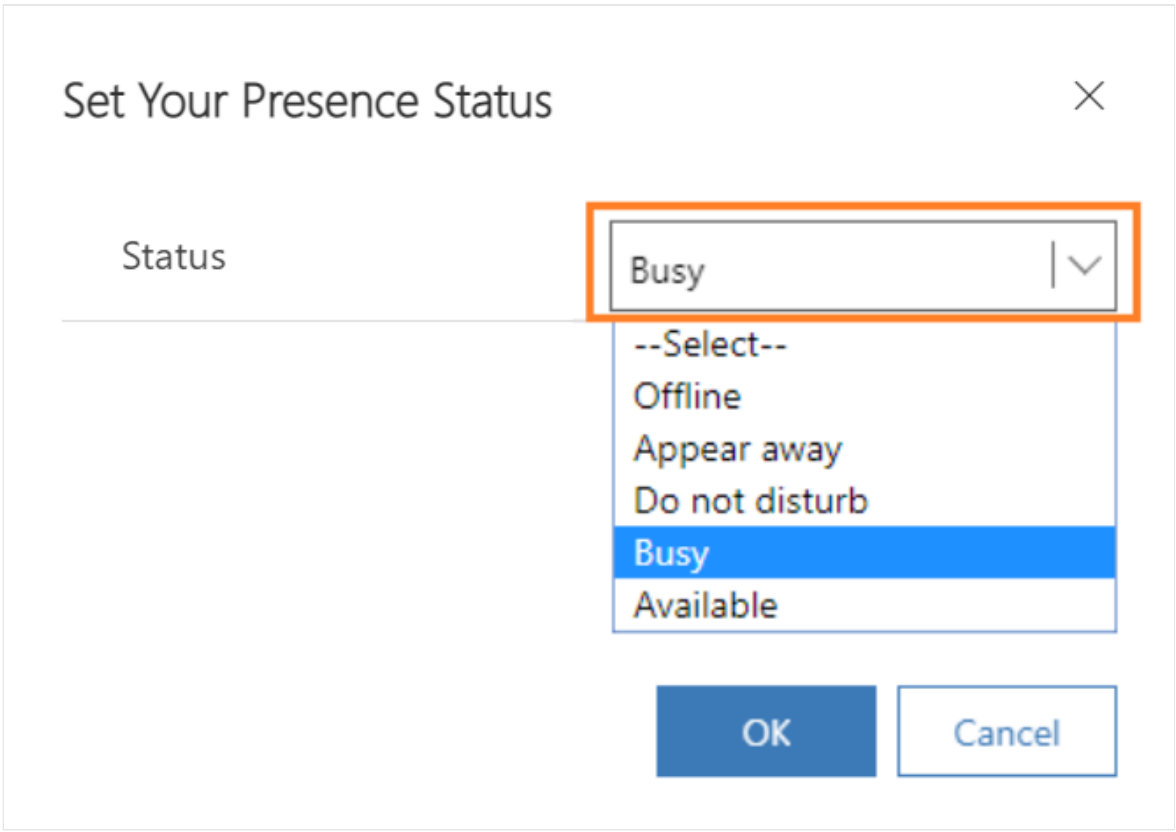
- Inactive

Update your presence status

You can update the presence status in the following two ways:

- **Manually**: To view and set the presence manually based on your availability, select the presence icon on the navigation bar. In the **Set Your Presence Status** dialog, select a status from the list. The list shows the following standard presence statuses:
  - Offline
  - Appear away
  - Do not disturb
  - Busy
  - Available

  You might also see other presence statuses that your administrator configured for you.

- **Automatically**: When a conversation (work item) is assigned to you, Omnichannel for Customer Service sets your presence status based on your capacity as follows:
  - When your capacity is fully utilized, then Omnichannel for Customer Service sets your presence to **Do not disturb**.

- When your capacity is partially utilized, then Omnichannel for Customer Service sets your presence to **Busy**.
- When your capacity isn't utilized, then Omnichannel for Customer Service sets your presence to **Available**.
- If you already have 10 sessions open, which is the maximum multisession limit, and a new work item comes in, then Omnichannel for Customer Service changes your presence to **Do not disturb**.
- When you miss a notification and the missed notifications setting is enabled, then the presence changes to **Inactive**.
- When you reject a work notification and the agent reject notification setting is enabled, then the presence changes to **Do not disturb**.

Presence status conditions

Your presence status pertains to the following conditions:

- Omnichannel for Customer Service determines your presence based on your used or released capacity. The presence changes from **Available** to **Busy**, **Busy** to **Do not disturb**, **Do not disturb** to **Busy**, or **Busy** to **Available**.
- If your presence is **Away** or **Offline**, then Omnichannel for Customer Service doesn't update the presence. But, you can manually change it.
- If you change your presence to **Do not disturb**, then Omnichannel for Customer Service doesn't update the presence. But, you can manually change it.
- If you are inactive or signed out due to any reason, the system will clear your presence status and recalculate a fresh status when you resume your work or sign in again.

The system waits for 2.5 minutes, after which the agent is considered as inactive and is marked as offline when the agent does any of the following actions:

- Closes the browser
- Signs out of Customer Service workspace
- Closes or signs out of the device
- Experiences disruption to internet
- Leaves the browser open without any activity

More information: FAQ on agent presence

Presence status scenarios

The following scenarios describe how your presence status can change while you work with your customers.

- **Reconnect**: When the connection is lost because of network issues, or when you refresh the browser and connect back, then Omnichannel for Customer Service picks up your last known presence.
- **Sign in**: When you sign in, your presence is set to the default presence if no work items have been assigned to you. If work items have been assigned, then your presence is automatically determined. However, if your default presence status is Away or Offline, then Omnichannel for Customer Service doesn't change your presence.
- **Accept work items**: When you accept a work item or it's assigned automatically, then Omnichannel for Customer Service determines your presence based on your work capacity. But if your presence status is Away or Offline, or if you've manually changed your presence to Do not disturb, then Omnichannel for Customer Service doesn't change your presence.
- **Close work items**: When you close a session, or resolve, cancel, or reroute a case, then Omnichannel for Customer Service determines your presence based on your work capacity. But, if your presence status Away or Offline, or if you've manually changed your presence to Do not disturb, then Omnichannel for Customer Service doesn't change your presence.
- **Reset agent presence**: When your presence is based on the missed notification or the agent reject notification, then Omnichannel for Customer Service determines your presence based on your work capacity.

Troubleshoot display of presence

Why doesn't my presence load?

See also

View notifications Introduction to the agent interface Manage sessions Manage applications View the communication panel for conversations Monitor real-time customer sentiment

Search for transcripts

Article • 08/02/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As an agent, you communicate with customers to resolve issues. All those conversations are stored as transcripts in Omnichannel for Customer Service app. When you want to find any details from the transcripts, you can search for them.

Search details in transcripts

1. Sign in to Omnichannel for Customer Service.
2. Select **Search** in the nav bar. The **Search** tab opens in the application tab panel.
3. Type a phrase in the search box, and then select the search icon. The results appears as a list.
4. Select a result. The **Conversation Form** opens in the application tab panel.

You can now view the details in the **Transcript** section.

> **Note**
>
> Users with the System Administrator role can access conversations that are handled by other agents.

See also

Configure relevance search for chat transcript

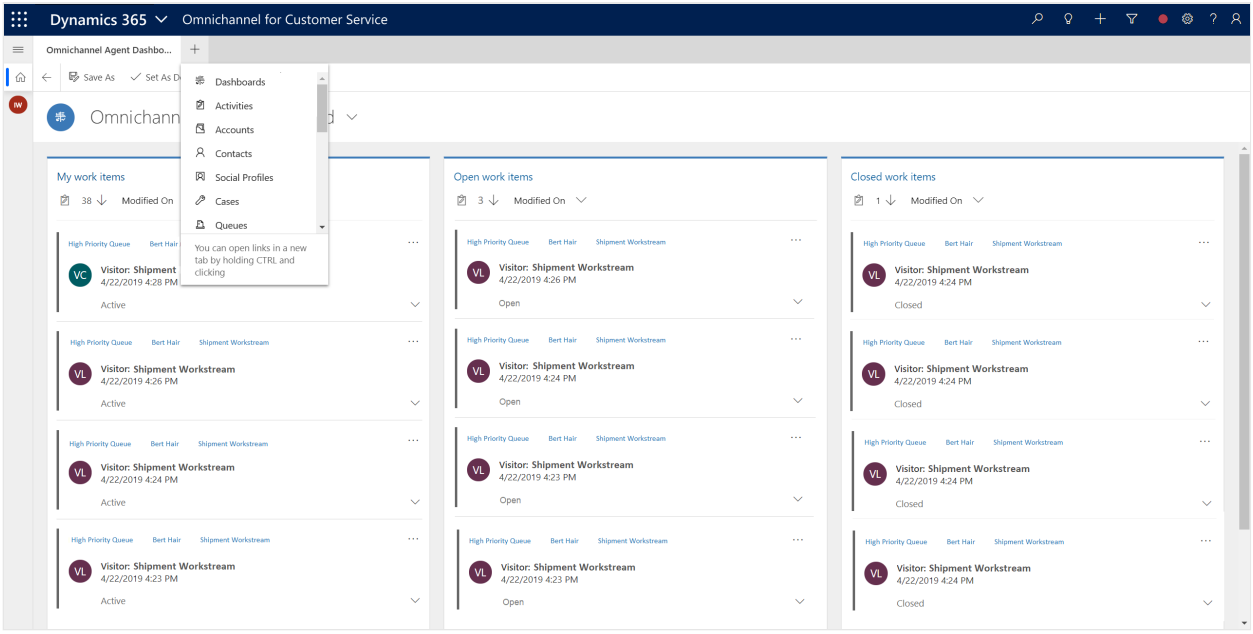
View conversation and session forms

Article • 04/05/2023

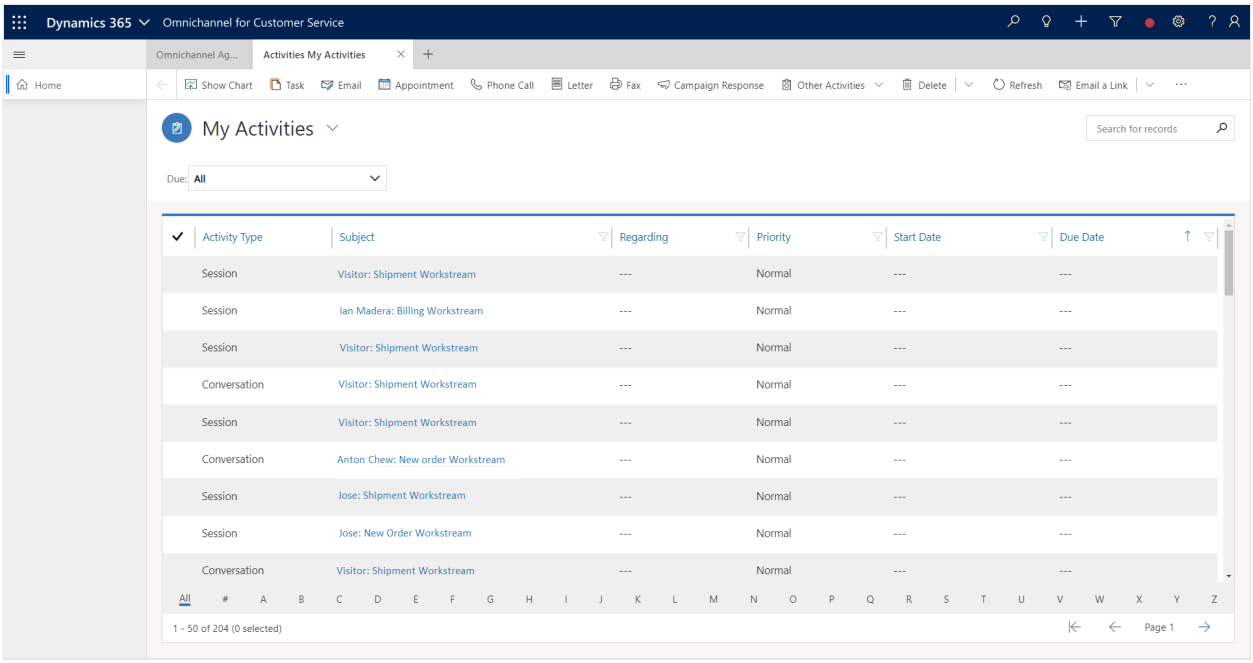
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Your organization might have a classification where certain agents work in the contact center, which uses Omnichannel for Customer Service on the web and certain agents work in another contact center, which uses model-driven app such as Customer Service Hub. In this case, if you are an agent who works on the model-driven app, and you need to analyze the conversation request from Omnichannel for Customer Service, you can find the information through **Activities** in the model-driven app.

Select the plus icon in the application tab to view the site map and select **Activities**.

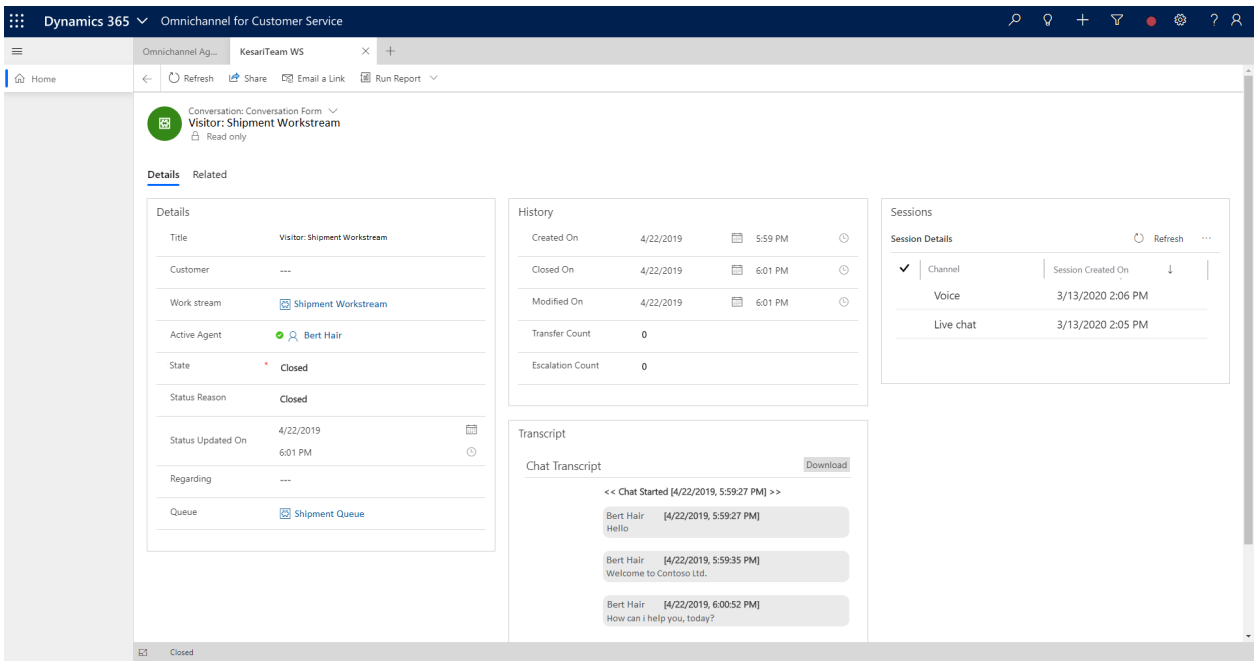


There'll be many activity types, and you need to look for **Conversation** and **Session** types.



Conversation activity type

The Conversation activity type displays information about a conversation request.



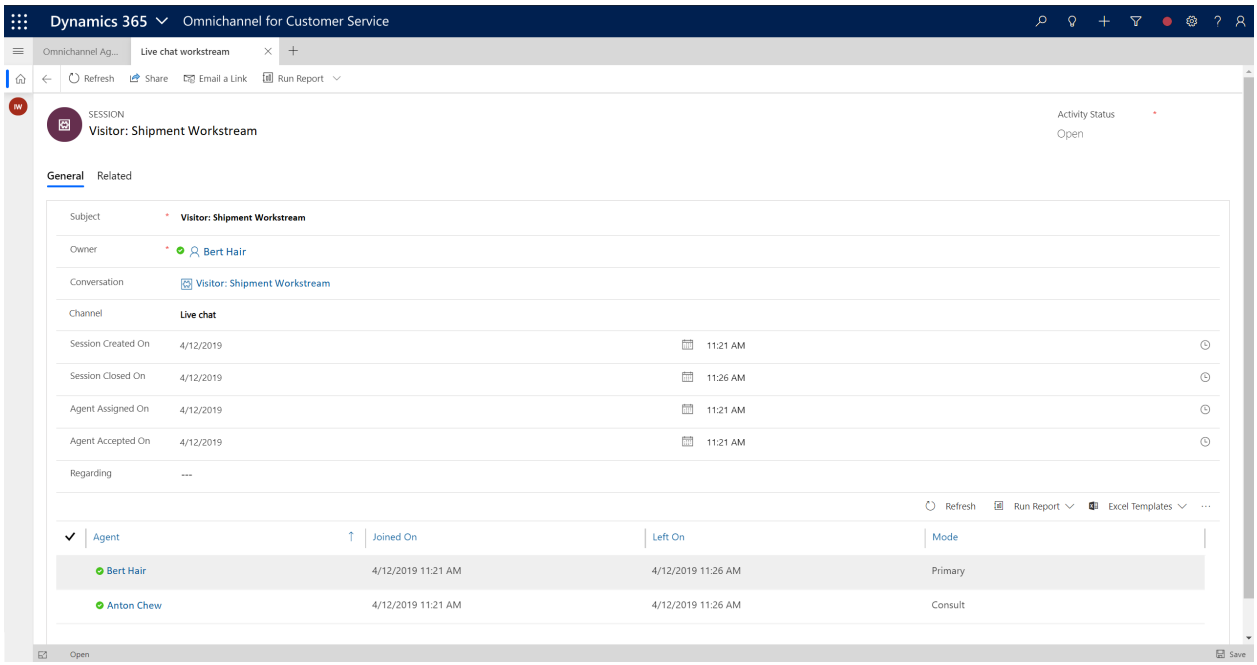
> **Note**
>
> The fields listed in the following table only are supported for the Conversation activity type.

Tab	Section	Fields

Tab	Section	Fields
Details	Details	• Title • Customer • Work stream • Active agent • Activity status • Status reason • Status updated on • Regarding • Queue
Details	History	• Created on • Closed on • Modified on • Transfer count • Escalation count
Details	Session Details	• Channel • Date created • Subject • Date created
Details	Chat Transcript	• Download

Session activity type

The session activity type displays information about a individual session in a conversation request.



> **Note**
>
> The fields listed in the following table only are supported for the Session activity type.

Tab	Section	Field
General	Header	• Activity Status
General	General	• Subject • Owner • Conversation • Channel • Session Created On • Session Closed On • Agent Assigned On • Agent Accepted On • Regarding • Name • Created on
General	Session Participants	• Agents • Joined On • Left On • Mode

The Session Participants section lets you add a participant related to the session or add a session participant that already exists for the record you are working with.

See also

View active conversations for an incoming conversation request
View customer information on Active Conversation form
Create a record
Search, link, and unlink a record

View active conversation for an incoming conversation request

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> The **Customer Summary** form is renamed as **Active Conversation** form.

Scenario 1: Incoming conversation request for an existing customer record

When you receive an incoming conversation request, you see a notification and accept the request, a session starts and the **Active Conversation** page appears with the details of the customer and case.

Scenario 2: Incoming conversation request with an associated record

When you get an incoming conversation request, you see a notification and accept the request. However, if there are no records present in Omnichannel for Customer Service based on the incoming conversation request, you can create a record. To learn more see, Create a record and Link a record.

See also

- View customer information on Active Conversation form
- View conversation and session activity types in the model-driven apps
- Search, link, and unlink a record

Use real-time translation of conversations for agents and customers

Article • 05/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

When language translation is enabled for conversations that are exchanged between the agent and customer or among agents internally, agents can view the conversation in the language that's set as the default for them. The customer receives the agent's messages in the language they used for initiating the chat. This feature removes the necessity of routing conversations only to agents who know the language being used by the customer.

How language translation of conversations works

When a customer initiates a chat conversation on the portal, irrespective of the language used by the customer, the assigned agent receives the chat text in the language that's set as the default. The language translation happens in real time. For example, if a customer initiates a chat in Spanish, the message text appears to an English-speaking agent in Spanish along with the translated English version. The agent has the option to view and respond to the chat in the customer's language or the agent's default language.

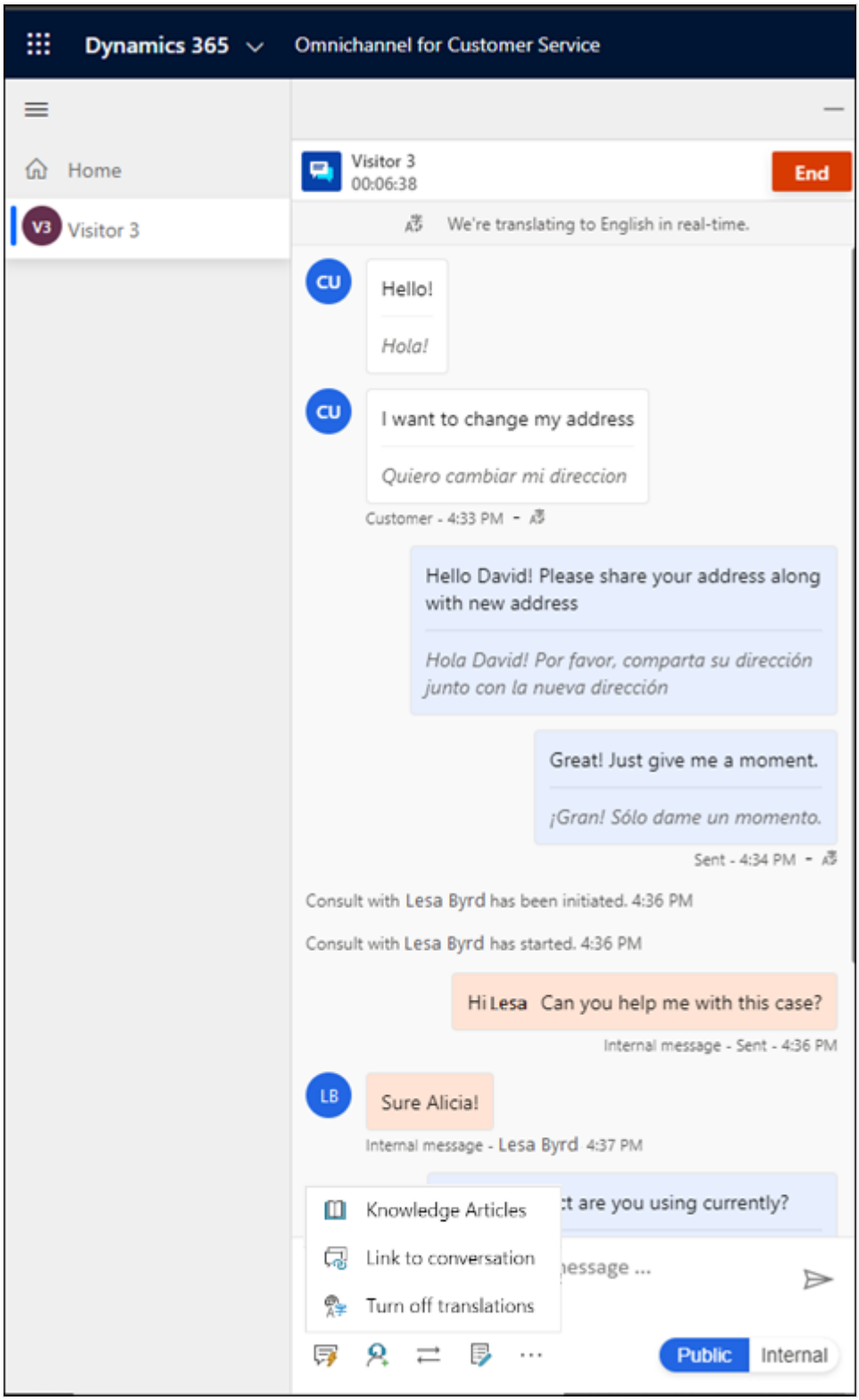
If the agent has to consult a peer or supervisor, it can be done in the language preferred between the agent and peer or agent and supervisor, which can be different from the language used between the agent and customer. The chat transcripts are saved in the languages used in the conversation.

The agent can see the following details pertaining to the feature:

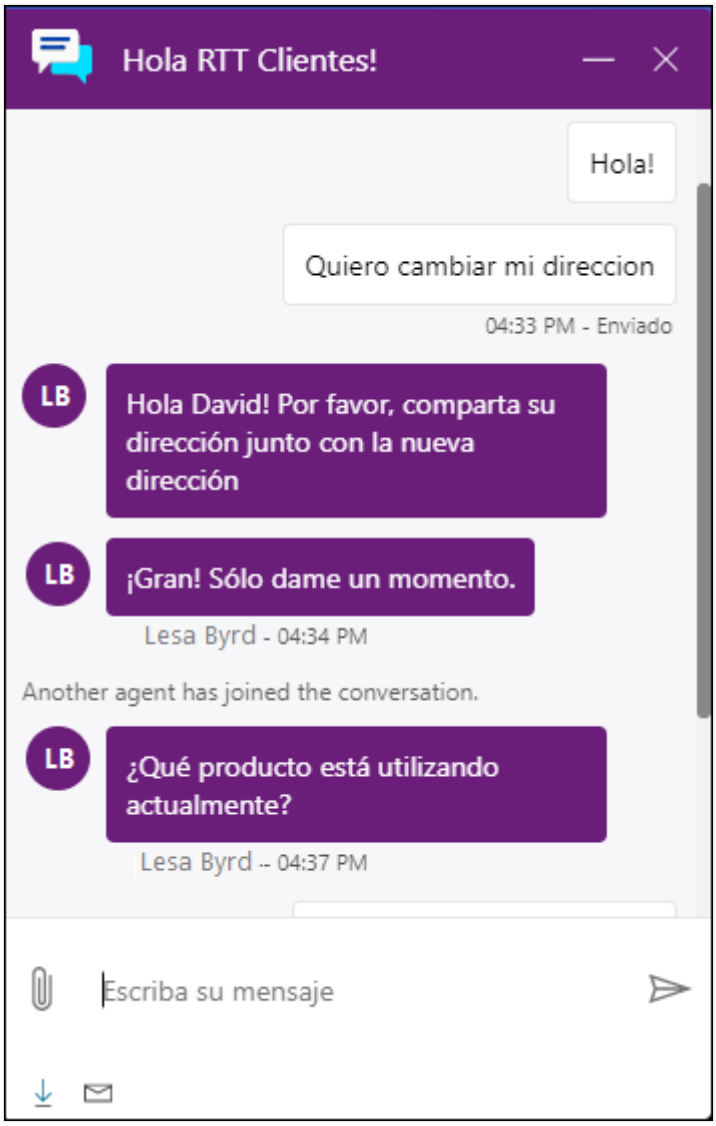
- Information about the language in which the agent receives the chat content is displayed at the top of the chat window.
- The chat content is displayed in the customer's language and translated language.

The agents can turn on or turn off the translation for each conversation by using the **More commands** button on the chat window.

The following image shows a sample screenshot of the agent experience.



The following image shows a sample screenshot of the customer experience.



See also

View customer information on Active Conversation form

View communication panel

Markdown formats for agents

Article • 06/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

In Omnichannel for Customer Service, you can use Markdown to format messages when you interact with customers over chat and social channels.

> **Note**
>
> You can use Markdown in chat and social channels only if your administrator has enabled the Markdown settings under **Agent experience** in the Customer Service admin center or Omnichannel admin center app. More information: **Enable formatted messages**

Markdown formats for chat messages

The following table lists the Markdown formats that you can use for your chat messages in Omnichannel for Customer Service.

Text style	You type...	The text displays as...
bold	**bold text** or *bold text*	**bold text**
italics	_italic text_	*italic text*
strikethrough	~strikethrough text~	~~strikethrough text~~
blockquote	> blockquote text	> blockquote text
header (levels 1–4)	### Header3 text	**Header 3 text**
hyperlink	`https://www.microsoft.com`	https://www.microsoft.com

Text style	You type...	The text displays as...
hyperlink with text	[Hyperlink with text] (https://www.microsoft.com)	Microsoft website
monospace	``` monospace text ```	`monospace text`
numbered list	<number> Item one	1. Item one 2. Item two
unordered list	* Item one or - Item one	* Item one * Item two
new line	Paragraph 1 Paragraph 2 </br>	Paragraph 1 Paragraph 2

> **Note**
>
> Currently, we don't support the **<Shift + Enter>** key combination to add multiple line breaks.

Formatted messages are supported in channels such as Microsoft Teams, WhatsApp, Facebook, Telegram, and custom channels that use Direct Line.

Next steps

Support for formatted messages

See also

Enable formatted messages
Bring your own custom messaging channel using Direct Line
Markdown formats in custom channels that use Direct Line

Develop a custom live chat widget

Article • 04/25/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Microsoft provides an option to create a custom live chat widget that you can attach to your Dynamics 365 Customer Service account. Each component of the custom live chat widget can be customized for both functionality and user interface.

Depending on your requirement and outcome, you can customize the chat widget using one of the following options:

- Use customizable live chat widget 2.0
- Develop your own widget

Use customizable live chat widget 2.0

The customizable live chat widget 2.0 lets you edit all elements of the widget, such as font, colors, and styling so that you can match the widget with your brand image. The customized widget helps you cultivate trust and credibility, distinguish your brand, foster positive emotional connections, and increase the value that customers attribute to your product.

The new live chat widget 2.0 is built upon Omnichannel Chat SDK and Live Chat Widget UI Component Library.

Portal Developer—Customize out-of-the-box script-based UI

The portal developer option lets you personalize the UI of the chat widget but doesn't modify the out-of-the-box functionality settings in Customer Service admin center. To customize, you can use the "data-customization-callback" script that connects the out-of-the-box widget to a JavaScript function. The function can contain CSS styling customizations to the chat components with the same precedents as the Omnichannel Live Chat Widget UI Components library.

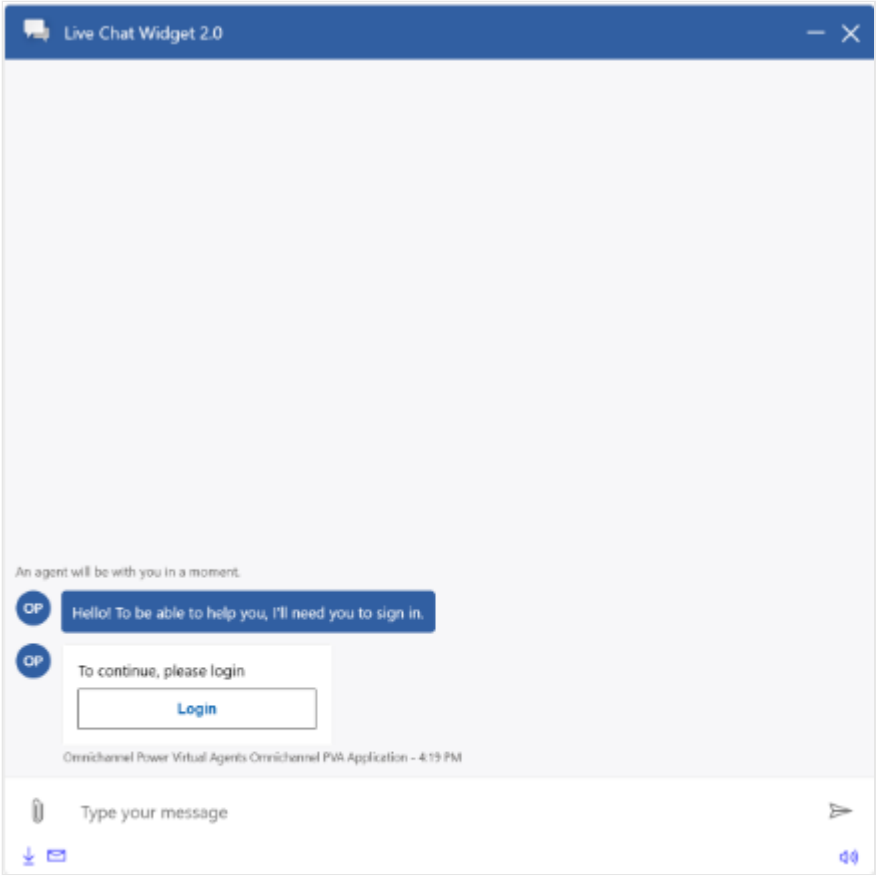
Edit live chat widget script to enable live chat widget 2.0

To use the live chat widget 2.0 and script-based customization, modify the code snippet of the out-of-the-box live chat widget 2.0 as follows.

1. In Customer Service admin center, open the chat workstream, and select **Copy Live Chat Widget 2.0 Script** to copy the code snippet.
2. Create a new JavaScript function with all component styling. More information: Omnichannel chat widget
3. Add "v2" after the script attribute.
4. Add "data-customization-callback" and reference the JavaScript function.

The updated code snippet will look as follows.

An example screenshot of a chat widget 2.0 that's customized to increase its size is as follows.



Watch the walkthrough video of the live chat widget set up.

Develop your own widget

Use the information in the following sections to build your own widget.

Omnichannel Live Chat Widget UI Components library

The Omnichannel Live Chat Widget UI Components library provides a framework of reusable React components. The components are built using the Fluent UI library. Learn more about the Omnichannel Live Chat Widget UI Components library.

Omnichannel Chat SDK

The Omnichannel Chat SDK is an open-source package that provides chat methods and features to add functionality to a live chat widget. Learn more about the Omnichannel Chat SDK.

Customize your live chat widget

After you install the latest version of the Omnichannel Chat SDK, customize your live chat widget using Omnichannel Chat SDK methods and by editing the basic CSS styles

of Omnichannel Live Chat Widget UI Components.

> **Note**
>
> The Omnichannel Chat SDK is a prerequisite for installing the Omnichannel Live Chat Widget UI Components library.

See also

Customize live chat widgets for mobile apps
startChat
closeChat
lcw:closeChat
lcw:threadUpdate
lcw:chatRetrieved
lcw:chatQueued

Customize live chat widgets using data tags

Article • 02/01/2023

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

You can customize live chat widgets by using data tags in the widget script. You can use the following tags in the chat widget script that you copy from your admin app such as Customer Service admin center or Omnichannel admin center. More information: Embed chat widget in your website or portal

Attribute name	Description	Example
`data-hide-chat-button`	When you implement your chat widget, you can add a chat button that aligns with your mobile app experience instead of using the default chat button. In such cases, use this data tag to hide the default open chat button that's available in the live chat widget.	`<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-hide-chat-button="true"></script>`
`data-disable-telemetry`	By default, telemetry data collection is turned on for all widgets. Set the value of this data tag to `true` if you want to disable telemetry data collection. More information: Live chat widget telemetry	`<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-disable-telemetry="true"></script>`
`data-render-mobile`	Open the chat widget in mobile mode. The chat widget doesn't have a header when used on a mobile device. More information: Customize live chat widget for mobile apps	`<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-render-mobile="true" ></script>`

Attribute name	Description	Example
`data-color-override`	Use this data tag to override the default chat widget theme color. This override will take priority over any color theme settings on the admin app.	Here's an example, where the widget theme color is changed to blue. `<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-color-override="#0000FF"></script>`
`data-font-family-override`	The default font family is "Segoe UI". Use this data tag to override the default font family with another native supported font.	**Example 1**: To override the default Segoe UI font and set the font family to Arial: `<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-font-family-override="Arial; Segoe UI"></script>` **Example 2**: To add a custom font family like Monotype Corsiva: `<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-font-family-override="Monotype Corsiva"></script>`
`data-open-in-window`	Use this data tag to open the chat widget in a new window. You can set this tag to `true` or `false` (default value). By default, the chat widget will open in the same browser window. If set to `true`, the chat widget will open in a new browser window when selected.	`<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-open-in-window="true"></script>`

Attribute name	Description	Example
`data-suggested-action-layout`	Use this data tag to display the suggested actions vertically. By default, the suggested actions are displayed horizontally. To display the suggested actions vertically, set the value of this data tag as `stacked`.	`<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-suggested-action-layout="stacked"></script>`
`data-enable-lcw-autofill`	Use this data tag to enable the chat widget to autofill the browser window in embedded mode.	`<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-enable-lcw-autofill="true"></script>`
`data-custom-close-button-text`	Use this data tag to customize the close button of the chat widget. The input is a text string that will appear in place of the default 'X' close button.	`<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-custom-close-button-text="End Chat"></script>`
`data-enable-sso-magic-code`	Use this data tag to automatically send a magic code to the user after sign-in, either in the chat or silently through the client. This is similar to multifactor authentication and helps prevent phishing attacks. You can set this tag to `true` (default value) or `false`. If set to `false`, the code is automatically sent through the client silently, after sign-in. If set to `true`, a magic code is displayed to the user to manually enter into the chat, after sign-in.	In this example, the magic code is automatically passed through the client after sign-in, without needing user input. `<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-enable-sso-magic-code="false"></script>`

Next steps

Develop a custom live chat widget

See also

Start chat proactively
Live chat widget telemetry
Customize live chat widgets for mobile apps
Live chat SDK reference

Customize live chat widgets for mobile apps

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

If the live chat SDK does not meet your requirements, then you can embed a widget code in your mobile app. However, embedding a chat widget code has many limitations such as reduced performance, limited mobile usability, and unavailable features.

> **Note**
>
> Live chat widget features—escalating to voice and video, and downloading the chat transcript—aren't supported on mobile apps.

Render the live chat widget using embedded code

A `WebView` is an embedded browser that enables a native application to display web content. Use the `WebView` component of your mobile operating system language to enable rendering of the web version of the chat widget on mobile devices. The WebView capability is offered on both Android and iOS.

The following sample code renders the chat widget in a mobile application.

Kotlin

```
var html: String = """
        <html>
            <head>
                <meta http-equiv="no-cache">
                <meta http-equiv="Expires" content="-1">
                <meta http-equiv="Cache-Control" content="no-cache">
                <script
                    type="text/javascript"
                    src = "Use src from widget code snippet"
```

```
                    id = Microsoft_Omnichannel_LCWidget
                    data-app-id = "Use data-app-Id from widget code snippet"
                    data-org-id = "Use data-org-Id from widget code snippet"
                    data-org-url = "Use data-org-url from widget code
snippet"
                    data-render-mobile = "true"
                    data-hide-chat-button = "true"
                    data-color-override = "desired color code eg. #008577">
                </script>
            </head>
            <body>
            </body>
        </html>
    """.trimIndent()
    var baseUrl: String = "Get baseUrl from data-org-url eg. https://oc-cdn-
ocprod.azureedge.net"
    chatWebView.loadDataWithBaseURL(baseUrl,html, "text/html", null,
baseUrl)
```

You can optimize the rendering of the chat widget for mobile web experience by using data tags such as `data-hide-chat-button` and `data-render-mobile`, along with a few APIs and events provided by the live chat widget client SDK. More information: Customize a chat widget using data tags

To open a chat session, you can call the startChat method when the new chat button is selected.

JavaScript

```
chatWebView.evaluateJavascript(
    "Microsoft.Omnichannel.LiveChatWidget.SDK.closeChat();",
    null
)
```

You can use the `data-render-mobile` data tag to optimize the rendering of the live chat widget on mobile. For example, it hides the header of the chat widget. Along with the header, the **Close (X)** button also goes away. To close the chat, you have to create an "end chat" button in the mobile app and call the closeChat method on the click event.

JavaScript

```
chatWebView.evaluateJavascript(
    "Microsoft.Omnichannel.LiveChatWidget.SDK.closeChat();", null)
```

The preceding code covers the scenario where the user of the mobile app ends the chat. However, in another scenario, where an agent ends the conversation, you can listen for

the lcw:threadUpdate event and call the closeChat method to end the conversation from the client side, as shown in the following code.

JavaScript

```
chatWebView.evaluateJavascript(
    "window.addEventListener(\"lcw:threadUpdate\", function()
{Microsoft.Omnichannel.LiveChatWidget.SDK.closeChat();})", null)
```

When the chat is closed, the live chat widget triggers the lcw:closeChat event. You can listen for this event, and perform any post-chat steps if required.

See also

Live chat SDK reference
Develop custom live chat widgets
startChat
closeChat
lcw:chatRetrieved
lcw:chatQueued
Customize live chat widgets using data tags

Download Omnichannel for Customer Service transcripts in bulk

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Omnichannel for Customer Service transcripts are stored in base64 encoded format in the annotations table in Microsoft Dataverse. Attachments are stored as separate records in the annotations table. If a conversation has two files exchanged between the agent and the customer, a total of three records are created related to this conversation. Any conversation always has n+1 records stored for it in the annotations table, where n is the number of attachments in the conversation. Attachments are also base64 encoded before being saved.

The option to download transcripts in bulk is not available out of the box. You can use the following Web API requests to retrieve all the transcripts and attachments exchanged in the past one month.

The following Web API request retrieves all the textual transcripts:

HTTP

```
GET [Organization URI]/api/data/v9.1/annotations?$filter=objecttypecode eq
'msdyn_transcript'
Accept: application/json
OData-MaxVersion: 4.0
OData-Version: 4.0
```

The following Web API request retrieves all the file attachment annotations:

HTTP

```
GET [Organization URI]/api/data/v9.1/annotations?$filter=objecttypecode eq
'msdyn_ocliveworkitem'
Accept: application/json
OData-MaxVersion: 4.0
OData-Version: 4.0
```

The `documentBody` attribute in the response obtained from each of the web API requests contains the base64 encoded transcript or attachment.

You can call the APIs using C# code and then iterate over each of the returned records, access the `documentBody` attribute, and process it to get the whole transcripts.

Structure of the JSON transcript

The transcripts you see in the link can contain different types of messages:

- Control messages
- System messages
- Text messages (for example, Hi, Hello, and How are you)
- File attachment metadata

On each of these types of messages, you can see a `createdDateTime` field that denotes the exact time at which this message was posted or created.

A control message is of no visual value and indicates an event like agent joined or left the conversation. It usually has a flag called `isControlMessage` set to `true`.

HTTP


```
{
    "content": "<addmember><eventtime>1589863236124</eventtime>
<initiator>28:bc81db89-c4d7-4763-91fe-086fcc2e6daf</initiator>
<rosterVersion>1589863235629</rosterVersion>
<lastRosterVersion>1589801089959</lastRosterVersion>
<target>8:orgid:04fd615d-586d-4866-9791-b24c5f7a9e78</target></addmember>",
    "contentType": "text",
    "createdDateTime": "2020-05-19T04:40:36.124+00:00",
    "likes": [],
    "attachments": [],
    "id": "1589863236124",
    "created": "2020-05-19T04:40:36.124Z",
```

```
    "culture": null,
    "deleted": null,
    "important": null,
    "modified": null,
    "modifiedDateTime": null,
    "isControlMessage": true,
    "from": null
},
```

A system message is a special type of message that's shown to the customer regarding events during the conversations. For example, when an agent joins, when an agent disconnects, and when a new agent joins.

HTTP

```
{
    "content": "Alan Steiner has left the conversation.",
    "contentType": "text",
    "createdDateTime": "2020-05-19T04:43:12.976+00:00",
    "from": {
        "application": {
            "displayName": "DynamicsBot",
            "id": "bc81db89-c4d7-4763-91fe-086fcc2e6daf"
        },
        "user": null,
        "phone": null,
        "guest": null,
        "encrypted": null,
        "onPremises": null,
        "azureApplicationInstance": null,
        "applicationInstance": null,
        "device": null
    },
    "likes": [],
    "attachments": [],
    "id": "1589863392976",
    "created": "2020-05-19T04:43:12.976Z",
    "culture": null,
    "deleted": null,
    "important": null,
    "modified": null,
    "modifiedDateTime": null,
    "tags": "system"
},
```

Text messages exchanged during the chat between agent and customer appear as follows:

HTTP

```
{
    "content": "I am using product A",
    "contentType": "text",
    "createdDateTime": "2020-05-19T04:43:03.979+00:00",
    "from": {
        "user": {
            "displayName": "Customer",
            "id": "04fd615d-586d-4866-9791-b24c5f7a9e78"
        },
        "phone": null,
        "guest": null,
        "encrypted": null,
        "onPremises": null,
        "azureApplicationInstance": null,
        "applicationInstance": null,
        "application": null,
        "device": null
    },
    "likes": [],
    "attachments": [],
    "id": "1589863384036",
    "created": "2020-05-19T04:43:03.979Z",
    "culture": null,
    "deleted": null,
    "important": null,
    "modified": null,
    "modifiedDateTime": null,
    "tags": "private,parentID-5493180821148088016",
    "deliveryMode": "unbridged"
},
```

As seen in the preceding code, messages sent by the customer have a display name "Customer" in case of an unidentified customer or their actual name if they're known to Omnichannel for Customer Service.

For the message that's sent by an agent to a customer, there are tags denoting that it's a “public” message sent by the agent. If the tags contain “private”, then they're internal messages exchanged between two agents and are not visible to the customer.

HTTP

```
{
    "content": "Great! Just give me a moment. \\nWhich product are you using
currently?",
    "contentType": "text",
    "createdDateTime": "2020-05-19T04:42:44.202+00:00",
    "from": {
        "user": {
            "displayName": "Alan Steiner",
            "id": "04fd615d-586d-4866-9791-b24c5f7a9e78"
        },
```

```
        "phone": null,
        "guest": null,
        "encrypted": null,
        "onPremises": null,
        "azureApplicationInstance": null,
        "applicationInstance": null,
        "application": null,
        "device": null
    },
    "likes": [],
    "attachments": [],
    "id": "1589863364220",
    "created": "2020-05-19T04:42:44.202Z",
    "culture": null,
    "deleted": null,
    "important": null,
    "modified": null,
    "modifiedDateTime": null,
    "tags": "public,messageId-1589863364202,RTT-C1",
    "deliveryMode": "unbridged"
},
```

A `FileAttachment` message looks like the following snippet in the JSON:

HTTP

```
{
    "content": "",
    "contentType": "text",
    "createdDateTime": "2020-05-06T21:31:37.316+00:00",
    "from": {
      "application": {
        "displayName": "Customer",
        "id": "6cc05310-05d9-4ce5-8fc0-d606c478f896"
      },
      "user": null,
      "phone": null,
      "guest": null,
      "encrypted": null,
      "onPremises": null,
      "azureApplicationInstance": null,
      "applicationInstance": null,
      "device": null
    },
    "likes": [
    ],
    "attachments": [
      {
        "id": "0-wus-d3-37f4fa3cd63945c526799ae5b4e009f5",
        "index": 0,
        "fileType": "docx",
        "name": "mr Hand goes to the moon, By contoso.docx",
        "sourceUrl": "https://us-api.asm.contoso.com/v1/objects/0-wus-d3-
```

```
37f4fa3cd63945c526799ae5b4e009f5/",
        "annotationid": "cfb551a8-ef4f-431a-871f-9b027ff940e3"
      }
    ],
    "id": "1588800697316",
    "created": "2020-05-06T21:31:37.316Z",
    "culture": null,
    "deleted": null,
    "important": null,
    "modified": null,
    "modifiedDateTime": null,
    "deliveryMode": "bridged"
  },
```

It usually has metadata related to the attachments exchanged during the chat. The `annotationid` is the key to the base64 encoded record in Annotations table for that file attachment. You can retrieve the record using the following Web API request. The Web API request gives you the base64 encoded attachment that you can decode and use the way you want.

HTTP

```
GET [Organization URI]/api/data/v9.1/annotations(<annotationid>)
Accept: application/json
OData-MaxVersion: 4.0
OData-Version: 4.0
```

See also

Omnichannel for Customer Service for developers

Add a web resource for real-time translation

Article • 03/08/2023

You can use a web resource to implement the logic for enabling real-time translation of messages exchanged in conversations between the customer and the agent.

To add a web resource:

1. Download the sample web resource (webResourceV2.js) file that you can use to implement the logic for enabling real-time translation of the conversation message, which are exchanged between the customer and the agent. More information: Web resources in model-driven apps.

2. Customize the settings, such as define the translation provider, language of the agent, when to turn on translation, and when to turn it off. More information: initializeNewConversation method and translateMessage method.

3. Upload the web resource file in your environment.

Upload the web resource file

Perform the following steps to upload the web resource file for real-time translation:

1. In Dynamics 365, on the top right of the Customer Service admin center page, select **Settings**, and select **Advanced Settings**.

2. On the page that appears on a new tab, select **Settings**, and then select **Solutions**.

3. In **All Solutions**, select **New**, and do the following:
   a. In the General section of the **Solution: New Solution** page, enter the details for the mandatory fields.
   b. Save the solution and close the form.

4. For the added solution, in the left pane, select **Web Resources** under **Components**.

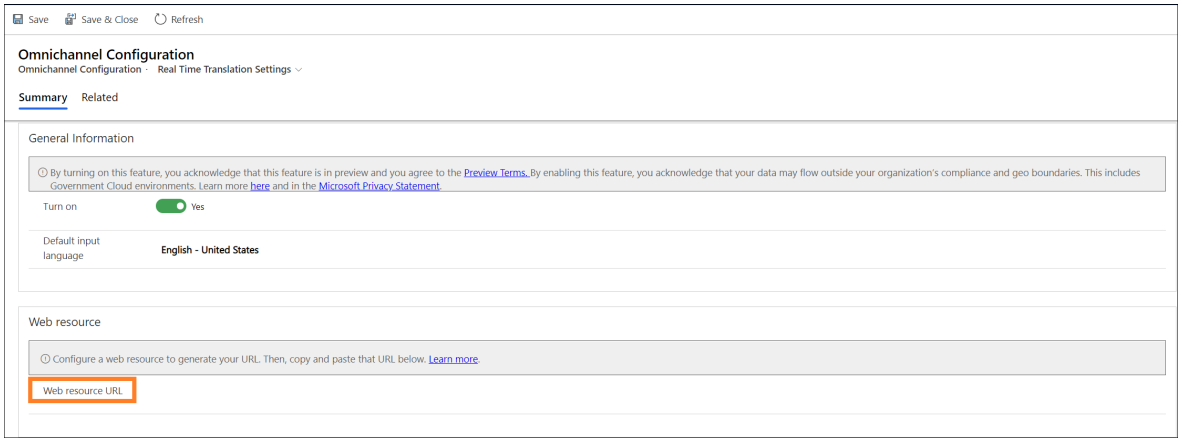
5. Select **New**, and perform the following steps:
   a. In the **General** section, enter a name for the web resource.
   b. In the **Content** section, select Script (JScript) for **Type**.
   c. For **Upload File**, select **Choose File** to upload the JavaScript file that you customized.
   d. Save the form, select the option to publish all customizations.

e. Copy the link in the **URL** field. You'll provide this link in the administrator settings in Customer Service admin center or Omnichannel admin center app for configuring real-time translation.
f. Select the option to publish all customizations on the **Solution** page, and close the form.

6. In the site map of Customer Service admin center app, select **Productivity** under Agent experience, then select **Manage** next to **Real-time translation**.

   If you're using Omnichannel admin center, then in the site map, select **Agent experience** under **Advanced settings**, and then select **Manage** next to **Real-time translation**.

7. In the **Web resource URL** field, paste the link that you had copied, and save the changes.



8. Select **Save**.

See also

Enable real-time translation of conversations
Real-time translation of conversations

Enable third-party co-browse and screen sharing

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Introduction

Co-browse and screen sharing are escalation channels in the Chat channel of Microsoft Dynamics 365. A co-browse or screen sharing escalation channel allows your organization's agents to start a co-browse or screen sharing session with customers. Using co-browse, agents can see and interact with a customer's web browser. Using screen sharing, agents can see and interact with the customer's current screen. This provides customers with an extra option to connect to an agent who can efficiently troubleshoot issues in real time.

Co-browse and screen sharing can be enabled in the Omnichannel for Customer Service chat channel by integrating with third-party solutions. Extensibility is provided to enable any providers to onboard their co-browse and screen sharing solution to Omnichannel for Customer Service.

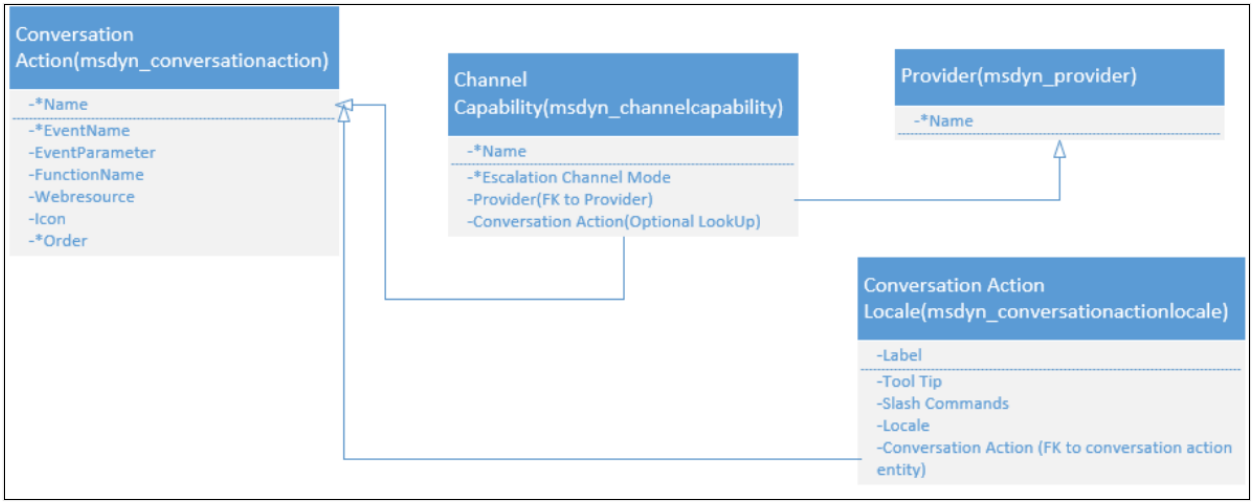
> **Note**
>
> Third-party co-browse and screen sharing features are not available in Unified Service Desk.

Prerequisites

- An active digital messaging or chat subscription.
- Updated Omnichannel base and Omnichannel chat solution with third-party co-browse externalities enabled.

Third-party co-browse and screen sharing extensibility framework

To enable third-party co-browse and screen sharing, the Omnichannel for Customer Service application has added an extensibility system to support this feature. In this system, a few entities have been added to the Omnichannel for Customer Service solution, and third-party co-browse and screen sharing providers should use these entities to enable their co-browse and screen sharing feature in the Omnichannel for Customer Service framework. The following graph explains the basic entity relationships that support the third-party co-browse and screen sharing feature.



Not all the above fields are required to be filled in for third-party co-browse and screen sharing providers. For version 1.0, ISVs are supported to bring their co-browse and screen sharing feature into Omnichannel for Customer Service by enabling a button in the agent's chat widget. When a user selects this button, it opens an app tab within Omnichannel for Customer Service with the ISV's application website. To enable this button, ISVs need to bring the required data with their co-browse and screen sharing solutions.

The following section lists the required entity data needed to support this feature.

- **Conversation Actions entity (msdyn_conversationaction)**

  The action that can be performed in the conversation.

  Fields:
  - Name (This is an identifier name for your button.)
  - Event Name (Option set: Open App Tab Template, Send message, Customer Defined function. For third-party co-browse/screen sharing feature, input **Open App Tab Template**.)

- Event Parameter (For the third-party co-browse/screen sharing button, put the App Tab Template name here.)
- Order (Used to determine the positions for conversation actions. Admin can edit. Smallest number comes first.)
- Icon (A web resource URL that links to the button icon.)

Fields classification and usage:

- This is the entity to store the action button metadata that is visible on the conversation control.
- Localized fields from relationships to Locale entity (label, tooltip, slash command) will be a subgrid in this conversation action form.
- Label, Order, Tooltip, Icon are used for rendering the button in the UI. Slash commands are used by agents to trigger conversation actions by typing the slash command in the chat box.
- Event Name, Web Resource, Event Parameter, and Function Name are used for handling the onButtonClick action.

- **Conversation Action Locale entity (msdyn_conversationactionlocale)**

  Localization information associated with the conversation action.

  Fields:

  - Label (The label of the button showing to users in conversation control.)
  - Tooltip (Tooltip for that button.)
  - Locale (Language key for that button.)
  - Conversation Action (FK to conversation action entity.)

- **Provider entity (msdyn_provider)**

  A list of third-party providers that bring capabilities into the application.

  Fields: Name (ISV name)

- **Channel Capability entity (msdyn_channelcapability)**

  The capability that a channel can enable, such as co-browse and screen sharing.

  Fields:

  - Name (provider_channelcapability relationship name)
  - Escalation Channel Mode (Co-browse, Screen Sharing, Audio, Video, or None. For third-party co-browse and screen sharing providers, use “Co-browse” or “Screen Sharing”.)
  - Provider (FK to Provider entity)

- Conversation Actions (A lookup field for conversation actions. If there is no button created for a certain capability, then it can be empty. For the third-party co-browse and screen sharing feature, link the channel capability to a conversation action record.

Fields classification and usage

The Escalation Channel Mode attribute will tell what this button can do. For example, co-browse, audio, video. When users select a certain Escalation Channel Mode for a conversation action—for example, "co-browse"—Omnichannel for Customer Service will handle this co-browse event and trigger a list of internal events like "create new session for secondary channel," "send system messages," and "update presence," which should be implemented in the Omnichannel for Customer Service code base.

One provider can bring several channel capabilities, but for one Conversation Action and one Provider, the capability should be unique. This is handled by using the Channel Capability entity, as shown in the following schema.

Channel Capability	Provider	Escalation Channel Mode	Conversation Action
ISV_screensharing	ISV	Screen sharing	CA1
ISV_cobrowse	ISV	Co-browse	CA2

UI rendering for the third-party co-browse and screen sharing button

Label, Order, Tooltip, and Icon are used for rendering a button in the UI. Users also can provide a slash command key for their button, but the slash command needs to be unique in the system. Users need to input this data when bringing in their button.

Name	Label	Order	Tooltip	Slash command	Icon
ISVCobrowse	ISV Co-browse	0	Start a Co-browse session provided by ISV	/cb	/webresource/.../...svg

Event handlers for third-party co-browse and screen sharing

For third-party co-browse, ISVs need to input the conversation action data for triggering the Open App Tab Template event. The Event Names are option sets. It can be a predefined omnichannel event that can be used for most cases, like Open App Tab Template or Send message. In a third-party co-browse case, it will use the Open App Tab Template as Event Name and the Event Parameter can be the App Tab Template name. There will be no Web Resources data for this event because the App Tab Template framework will handle the web resource.

Name	Event Name	Event Parameter	Capability
ISVCobrowse	Open App Tab Template	ISVAppTabTemplate	Co-browse

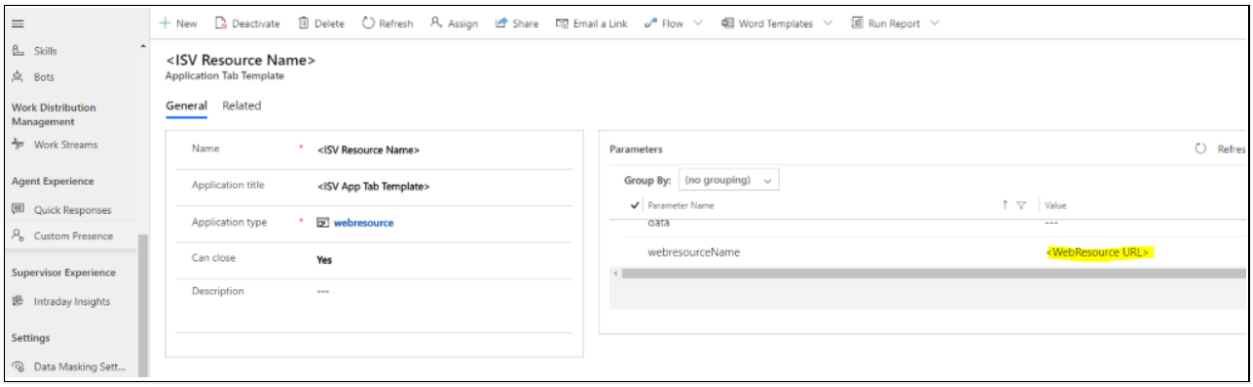
App Tab Template for third-party co-browse and screen sharing

We encourage our integrated third-party co-browse providers to make their co-browse and screen sharing applications inside of an Omnichannel for Customer Service tab. When the agent selects the **Co-browse** button in the chat widget, it will open this tab. Inside of this tab, the agent can start and end the co-browse sessions and share the session invitations with customers. You can include the data in this form inside of your solution. Follow these steps to create the App Tab Template:

1. Sign in to Power Apps and select **Apps**.
2. Select the ellipsis next to Omnichannel for Customer Service and select **App profile manager**.
3. Select **App profiles**.
4. Expand **Omnichannel for Customer Service**.
5. Under **Templates**, select **Application tabs**.
6. Select **New** to create a channel application tab.

   See Manage application tab templates for more information about completing this form.
7. In the Application type field, select **webresource**.
8. In the Parameters section, add the web resource URL and query parameters that are required for ISVs to open their web resources.

   webresourcename: `<URL path to the web resource>`



You'll find a single URL parameter called `data` that'll contain a JSON object. This object when decoded and parsed will contain the `conversationId` field. This ID can be used to attach any data back to a conversation.

Create the third-party co-browse and screen sharing solution with the required data

ISVs should bring in all the required data as specified in the Third-party co-browse extensibility framework section and the App Tab Template for third-party co-browse section to make this framework work.

The data input requirements for third-party providers are as follows:

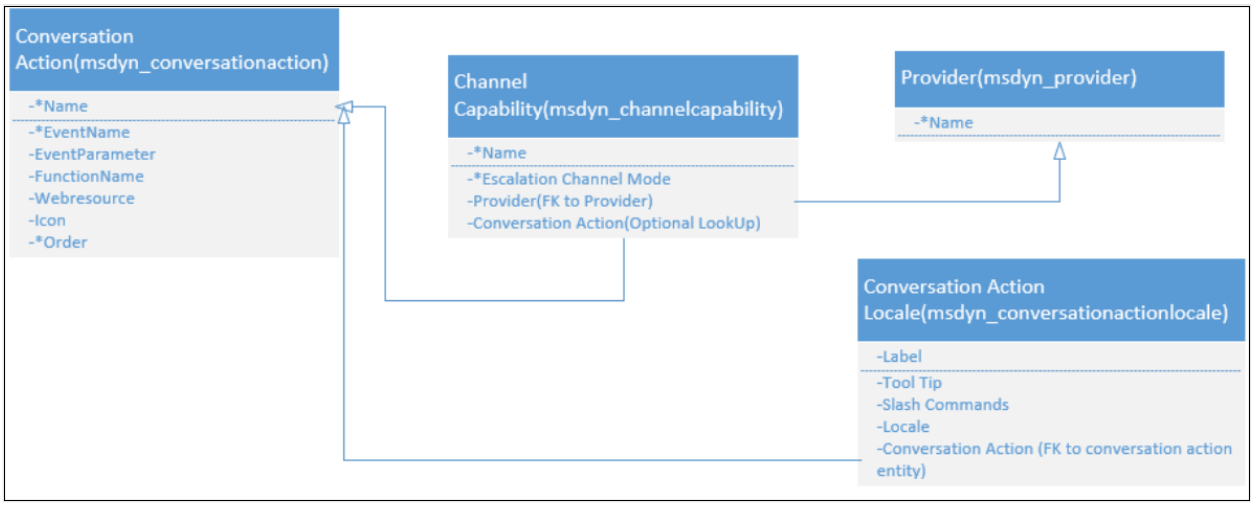
- App Tab Template record.
- Conversation Action record. (If you have both co-browse and screen sharing options, you can create two records, one for each.)
- Conversation Action Locale record. (For each conversation action you created, you should have at least one Conversation Action Locale record. The basic language we support is English.)
- Provider record.
- Channel Capability record. (If you have both co-browse and screen sharing options, you can create two records, one for each.)

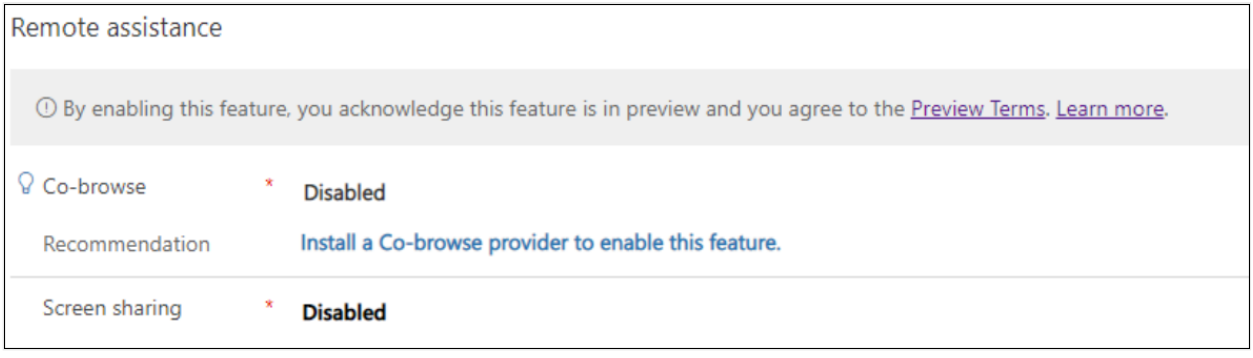
These records (Conversation Action records, Conversation Action Locale records, Channel Capability records, Provider record, and Application Tab Template records) should be included as part of the solution you create as a third-party provider so that the end user doesn't need to create them manually.

Omnichannel administration experience for third-party co-browse and screen sharing

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

In the **Conversation Options** tab of the chat widget, in the **Remote assistance** section, the Omnichannel administrator can choose to enable or disable the third-party co-browse and screen sharing options per chat widget. If there are no co-browse and screen sharing providers installed in this organization, these two options are disabled as shown here.

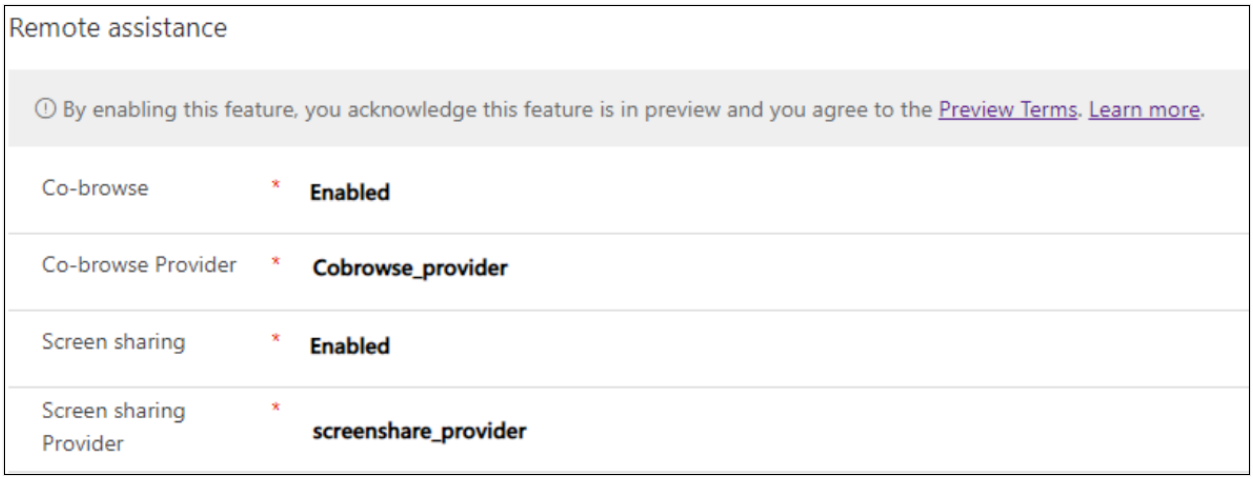




> **Note**
>
> The co-browse provider and screen sharing provider are controlled separately. You can install a co-browse provider by creating a co-browse channel capability record

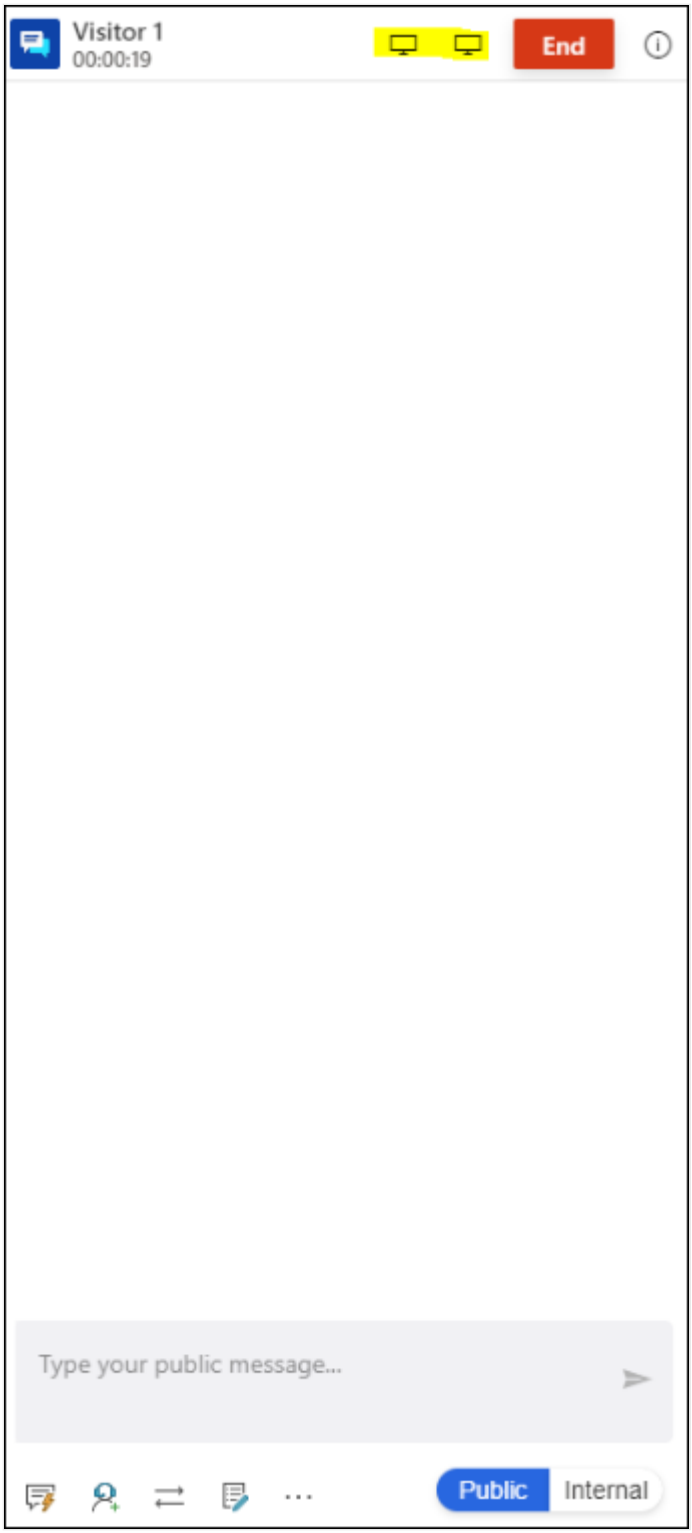
with required provider and conversation action data, the same as the screen sharing provider.

When the organization has been provisioned with both options—that is, when it has two different channel capabilities installed—the admin can choose which third-party co-browse provider to use. Also, it's the admin's choice whether to disable or enable these options. Here is the screenshot for admin enabled both options and selected the both providers.



Co-browse and screen sharing button rendering in the agent chat widget

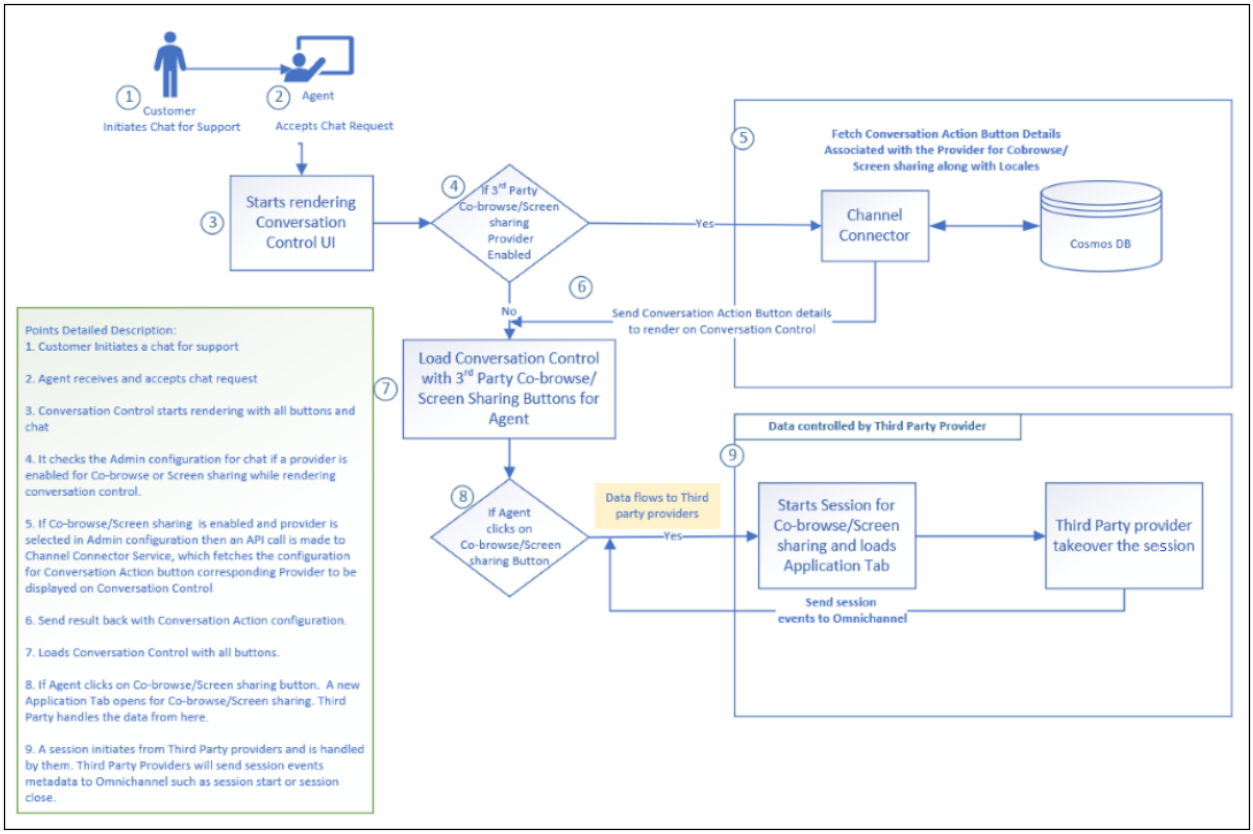
When a co-browse and screen sharing button is defined, it will be rendered at the top of the conversation control as shown here.



Omnichannel session services and data flow for third-party co-browse and screen sharing

When an agent selects the button for co-browse or screen sharing, it triggers the application tab inside of the Omnichannel service. Omnichannel for Customer Service will handle the events as escalation channels event type. Omnichannel for Customer Service internal services will update the status for current session events.

After the third-party applications take over, all data will be handled by a third-party application server. See the following graph for the integration data flow.



Some important events, such as starting or ending session events, should be reported to the Omnichannel service, so the overall service knows the status of the current agent. We provide third-party providers with this framework. It is the third-party providers' responsibility to implement it in their codebase. The next section provides details on how to implement it.

Events expected from the third-party application

The third-party application is expected to send events notifying Omnichannel for Customer Service of different milestones in the co-browse and screen sharing session. Currently, these events are as follows:

- CobrowseConnectedEvent (on connection of the co-browse session)
- CobrowseEndedEvent (on end of the co-browse session)
- ScreenShareConnectedEvent (on connection of the screen sharing session)
- ScreenShareEndedEvent (on end of the screen sharing session)

The events must be dispatched within the third-party web resource to the `window.top` element.

JavaScript

```
function triggerCobrowseStart() {
  if(document.createEvent) {
    let params = {};

    let evt = new CustomEvent('CobrowseConnectedEvent', {detail: params});
    window.top.dispatchEvent(evt);
  }
}
```

The `CobrowseEndedEvent` and `ScreenShareEndedEvent` should be added to the `onbeforeunload` property of the web resource so that the session is ended if the agent closes out of the tab within Omnichannel for Customer Service.

HTML

```
<script>
function triggerCobrowseStop() {
  if(document.createEvent){

    let params = {};

    let evt= new CustomEvent('CobrowseEndedEvent', {detail:params});
    window.top.dispatchEvent(evt);
  }
}

</script>
</head>
<body onbeforeunload="return triggerCobrowseStop()">
</body>
```

Provisioning and deprovisioning requirements

To provision the third-party co-browse and screen sharing solution for our customers, ISVs should provide a solution with the required data. When customers install the solution, minimal or no manual steps are required of them to enable the co-browse and screen sharing feature. We require ISVs to be responsible for the data they created and to follow our guidance as required.

To deprovision the third-party co-browse and screen sharing solution for our customers, ISVs should remove the solution along with the data created with this framework. There shouldn't be any existing legacy data or code remaining in that org after deprovisioning.

Publishing strategy

The following are links for publishing the application to AppSource:

AppSource onboarding

Onboarding guide

ISV Studio

Overview Guide PDF

Agreement PDF

Policies PDF (Includes benefit table)

Program page on partner.microsoft.com site with links to certificate info

Customer/partner support

Third-party providers responsibility and data disclaimer

Be sure to publish the privacy policy link to AppSource for security and privacy protection of the personal information that would be processed, and provide a compliant approach to data protection.

Live chat widget telemetry

Article • 06/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The live chat widget in Chat for Dynamics 365 collects telemetry data from end users to improve the feature's capabilities, reliability, and performance over time by helping Microsoft understand usage patterns, plan new features, and troubleshoot and fix problem areas.

Some of the data collected by the live chat widget include the following.

Field	Sample value
OrganizationId	`8e9071c2-4415-47aa-b1cb-693631e7fafb`
Chat Widget Version	`prod`
BrowserName	`Edge`
OSName	`Windows`
Anonymized IP Address (last octet redacted)	`19.207.000.000`

> **ⓘ Important**
>
> No personal data is contained in the live chat widget telemetry.

If your organization is concerned about the data collected by this service, you can turn off automatic data collection by adding an HTML attribute to the chat widget script.

HTML

```
data-disable-telemetry = "true"
```

See also

Customize live chat widgets using data tags

Customize live chat widgets for mobile apps

Configure relevance search for transcripts

Article • 01/29/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

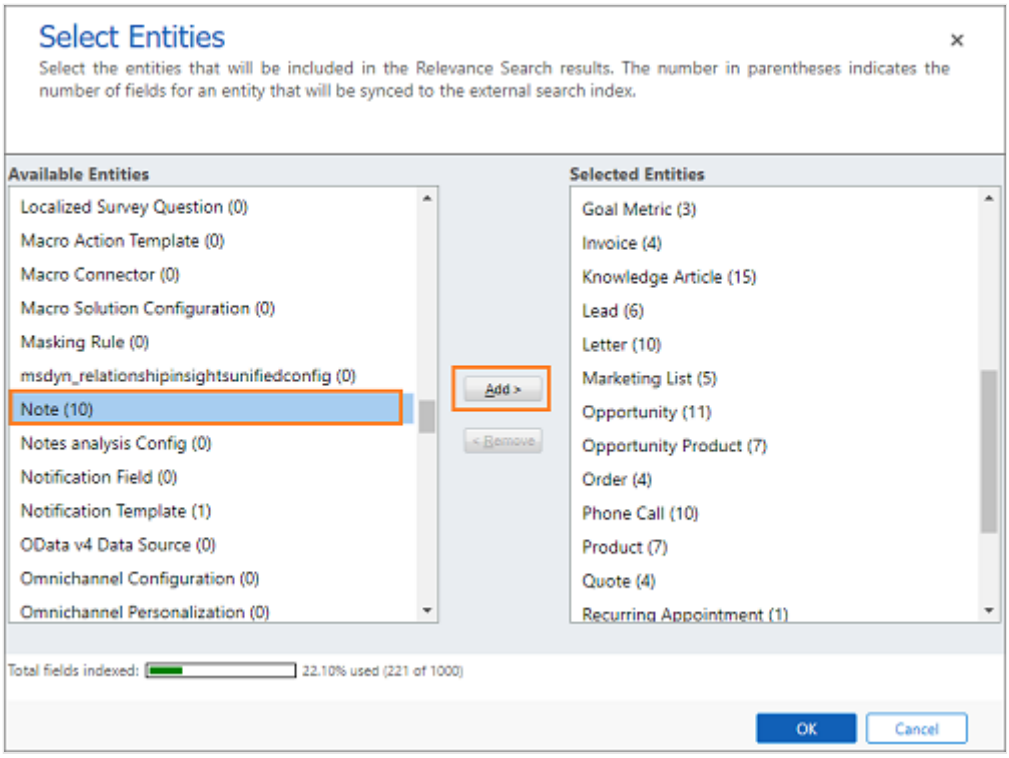
In Omnichannel for Customer Service, agents can search for details in transcripts. To enable agents to search in transcripts, you as a system customizer need to configure relevance search for the Note entity and then add the entity to Omnichannel for Customer Service.

Prerequisites

Ensure that relevance search is enabled in your environment. To learn more, see Enable relevance search.

Configure relevance search for the Note entity

1. Sign in to Dynamics 365.
2. Select **Settings** > **Customizations** > **Customize the System**. The **Solution: Default Solution - Microsoft Dynamics 365** window appears.
3. Under **Components**, select **Entities**.
4. Select **Configure Relevance Search**. The **Select Entities** dialog appears.
5. In the **Available Entities** box, select **Note**, select **Add**, and then select **OK**.



6. Select **Save**.

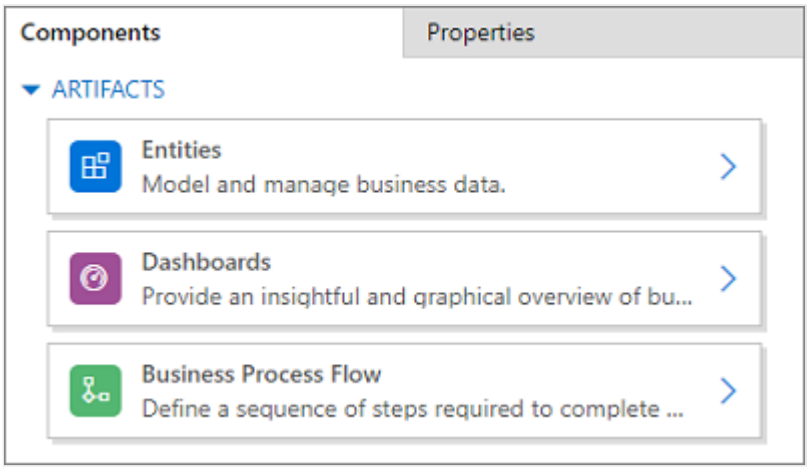
7. Select **Publish All Customizations**.

Add the Note entity to Omnichannel for Customer Service

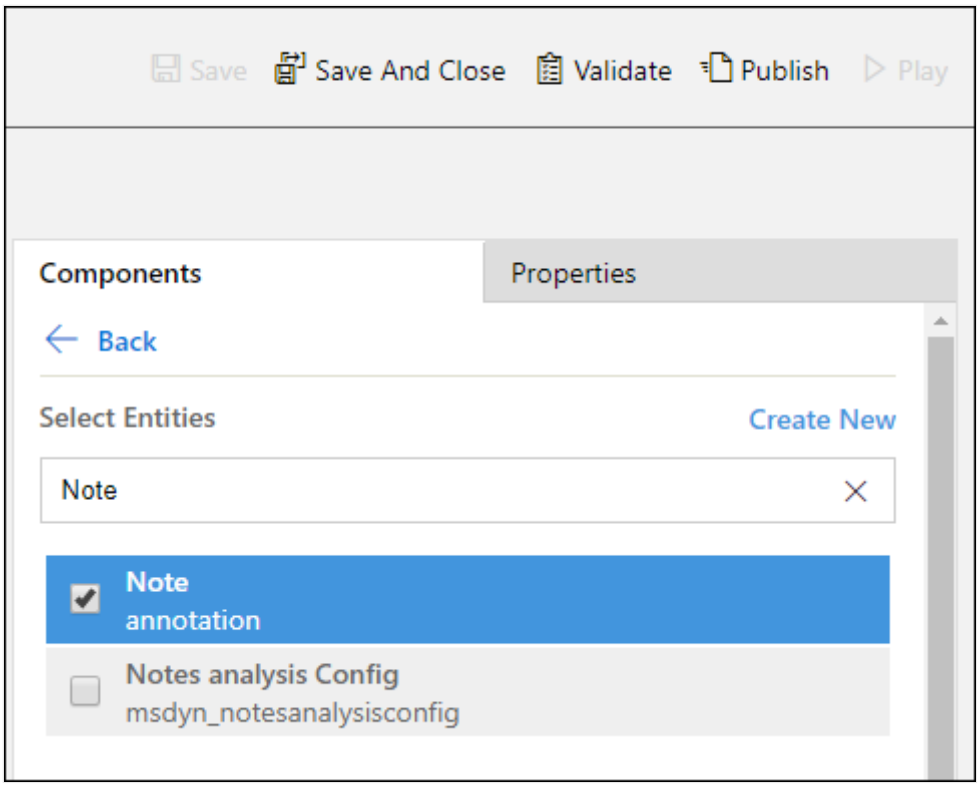
1. Sign in to `https://<org>.dynamics.com/apps`.

2. Select **More Options** (...) in the **Omnichannel for Customer Service** app tile, and then select **OPEN IN APP DESIGNER**. The **App Designer** opens in a new browser tab.

3. On the **Components** tab, under **ARTIFACTS**, select **Entities**.



4. Type **Note** in the search box, and then select the check box next to **Note** in the search results.



5. Select **Save**, and then select **Publish**.

See also

Search for transcripts

Configure Link to conversation button in model-driven app entity form

Article • 08/19/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This topic describes how you, as a system customizer, can configure the **Link to conversation** button in the model-driven app entity form for agents using Omnichannel for Customer Service app.

When an agent accepts a conversation request, and there is no record in Omnichannel for Customer Service linked to this conversation, the agent wants to search for a contact or account record and link the record to the conversation. As a system customizer, you need to configure the **Link to conversation** button in the model-driven app entity (contact, account or case) form so agents can link a record to the current conversation. After you link a record to the conversation, the **Active Conversation** page loads and displays the record that you linked.

> **Note**
>
> The Link to conversation button appears only in a session (context of a conversation) and not on the main forms.

To add the **Link to conversation** button in the model-driven app entity form, as a system customizer, you need to customize the ribbon (`<RibbonDiffXml>`) definition. The customization change definitions that you specify are applied at runtime when the ribbon is displayed in the application.

With latest release of Omnichannel for Customer Service base solutions, you get the web resources to add the **Link to conversation** button.

Customize the entity ribbon to add Link to conversation button

To add the **Link to conversation** button, you need to customize the ribbon (`<RibbonDiffXml>`) of the entity. To do so, you will edit the ribbon in the **Form context** of the entity.

Name of the web resource: `msdyn_OmnichannelLinkCommand.js`

Step 1: Export and edit the XML

Step 2: Add command and define ribbon actions

Step 3: Enable display rules

Step 4: Import the ribbon

Step 1: Export and edit the XML

In this step, you need to export the ribbon and edit the `<RibbonDiffXml>`.

To learn more, see Export, prepare to edit, and import the ribbon.

Step 2: Add command and define ribbon actions

Edit the XML to provide values for the parameters such as:

- Library
- FunctionName
- StringParameter Value
- Button

Parameter name	Value	Comment
`Library`	`$webresource:msdyn_OmnichannelLinkCommand.js`	
`FunctionName`	`OmniChannelPackage.OmnichannelLinkCommand.linkRecordToConversation`	

Parameter name	Value	Comment
`StringParameter Value`	• `msdyn_account_msdyn_ocliveworkitem_Customer` • `msdyn_incident_msdyn_ocliveworkitem` • `msdyn_contact_msdyn_ocliveworkitem_Customer`	• Used for the Account entity • Used for the Case entity • Used for the Contact entity

Sample snippet

XML

```
<JavaScriptFunction
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.linkRecordToConversat
ion" Library="$webresource:msdyn_OmnichannelLinkCommand.js">
<StringParameter Value="msdyn_account_msdyn_ocliveworkitem_Customer" />
</JavaScriptFunction>
```

Sample XML for Account entity ribbon customization

XML

```
<RibbonDiffXml>
  <CustomActions>
    <CustomAction Id="msdyn.account.LinkToConversation.Button.CustomAction"
Location="Mscrm.Form.account.MainTab.Save.Controls._children" Sequence="57">
      <CommandUIDefinition>
        <Button Alt="$LocLabels:msdyn.account.LinkToConversation.Button.Alt"
Command="msdyn.account.LinkToConversation.Command"
Id="msdyn.account.LinkToConversation.Button"
Image32by32="$webresource:msdyn_LinkToConversationCommandButtonIcon.png"
Image16by16="$webresource:msdyn_LinkToConversationCommandButtonIcon.png"
LabelText="$LocLabels:msdyn.account.LinkToConversation.Button.LabelText"
Sequence="57" TemplateAlias="o1"
ToolTipTitle="$LocLabels:msdyn.account.LinkToConversation.Button.ToolTipTitle
"
ToolTipDescription="$LocLabels:msdyn.account.LinkToConversation.Button.ToolTi
pDescription" />
      </CommandUIDefinition>
    </CustomAction>
  </CustomActions>
```

```
  <Templates>
    <RibbonTemplates Id="Mscrm.Templates"></RibbonTemplates>
  </Templates>
  <CommandDefinitions>
    <CommandDefinition Id="msdyn.account.LinkToConversation.Command">
      <EnableRules>
        <EnableRule Id="msdyn.account.EnableInConversationContext.EnableRule"
/>
      </EnableRules>
      <DisplayRules />
      <Actions>
        <JavaScriptFunction
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.linkRecordToConversat
ion" Library="$webresource:msdyn_OmnichannelLinkCommand.js">
          <StringParameter
Value="msdyn_account_msdyn_ocliveworkitem_Customer" />
        </JavaScriptFunction>
      </Actions>
    </CommandDefinition>
  </CommandDefinitions>
  <RuleDefinitions>
    <TabDisplayRules />
    <DisplayRules />
    <EnableRules>
      <EnableRule Id="msdyn.account.EnableInConversationContext.EnableRule">
        <CustomRule
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.shouldDisplayLinkComm
and" Library="$webresource:msdyn_OmnichannelLinkCommand.js" Default="false"
/>
      </EnableRule>
    </EnableRules>
  </RuleDefinitions>
  <LocLabels>
    <LocLabel Id="msdyn.account.LinkToConversation.Button.Alt">
      <Titles>
        <Title description="Link to conversation" languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel Id="msdyn.account.LinkToConversation.Button.LabelText">
      <Titles>
        <Title description="Link to Conversation" languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel
Id="msdyn.account.LinkToConversation.Button.ToolTipDescription">
      <Titles>
        <Title description="Link this record to the conversation"
languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel Id="msdyn.account.LinkToConversation.Button.ToolTipTitle">
      <Titles>
        <Title description="Link to conversation" languagecode="1033" />
      </Titles>
    </LocLabel>
```

```
  </LocLabels>
</RibbonDiffXml>
```

Sample XML for Case entity ribbon customization

XML

```
<RibbonDiffXml>
  <CustomActions>
    <CustomAction Id="msdyn.incident.LinkToConversation.Button.CustomAction"
Location="Mscrm.Form.incident.MainTab.Save.Controls._children" Sequence="45">
      <CommandUIDefinition>
        <Button Alt="$LocLabels:msdyn.incident.LinkToConversation.Button.Alt"
Command="msdyn.incident.LinkToConversation.Command"
Id="msdyn.incident.LinkToConversation.Button"
Image32by32="$webresource:msdyn_LinkToConversationCommandButtonIcon.png"
Image16by16="$webresource:msdyn_LinkToConversationCommandButtonIcon.png"
LabelText="$LocLabels:msdyn.incident.LinkToConversation.Button.LabelText"
Sequence="45" TemplateAlias="o1"
ToolTipTitle="$LocLabels:msdyn.incident.LinkToConversation.Button.ToolTipTitl
e"
ToolTipDescription="$LocLabels:msdyn.incident.LinkToConversation.Button.ToolT
ipDescription" />
      </CommandUIDefinition>
    </CustomAction>
  </CustomActions>
  <Templates>
    <RibbonTemplates Id="Mscrm.Templates"></RibbonTemplates>
  </Templates>
  <CommandDefinitions>
    <CommandDefinition Id="msdyn.incident.LinkToConversation.Command">
      <EnableRules>
        <EnableRule
Id="msdyn.incident.EnableInConversationContext.EnableRule" />
      </EnableRules>
      <DisplayRules />
      <Actions>
        <JavaScriptFunction
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.linkRecordToConversat
ion" Library="$webresource:msdyn_OmnichannelLinkCommand.js">
          <StringParameter Value="msdyn_incident_msdyn_ocliveworkitem" />
        </JavaScriptFunction>
      </Actions>
    </CommandDefinition>
  </CommandDefinitions>
  <RuleDefinitions>
    <TabDisplayRules />
    <DisplayRules />
    <EnableRules>
      <EnableRule Id="msdyn.incident.EnableInConversationContext.EnableRule">
        <CustomRule
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.shouldDisplayLinkComm
```

```
and" Library="$webresource:msdyn_OmnichannelLinkCommand.js" />
      </EnableRule>
    </EnableRules>
  </RuleDefinitions>
  <LocLabels>
    <LocLabel Id="msdyn.incident.LinkToConversation.Button.Alt">
      <Titles>
        <Title description="Link to conversation" languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel Id="msdyn.incident.LinkToConversation.Button.LabelText">
      <Titles>
        <Title description="Link to Conversation" languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel
Id="msdyn.incident.LinkToConversation.Button.ToolTipDescription">
      <Titles>
        <Title description="Link this record to the conversation"
languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel Id="msdyn.incident.LinkToConversation.Button.ToolTipTitle">
      <Titles>
        <Title description="Link to conversation" languagecode="1033" />
      </Titles>
    </LocLabel>
  </LocLabels>
</RibbonDiffXml>
```

Sample XML for Contact entity ribbon customization

XML

```
<RibbonDiffXml>
  <CustomActions>
    <CustomAction Id="msdyn.contact.LinkToConversation.Button.CustomAction"
Location="Mscrm.Form.contact.MainTab.Save.Controls._children" Sequence="53">
      <CommandUIDefinition>
        <Button Alt="$LocLabels:msdyn.contact.LinkToConversation.Button.Alt"
Command="msdyn.contact.LinkToConversation.Button.Command"
Id="msdyn.contact.LinkToConversation.Button"
Image32by32="$webresource:msdyn_LinkToConversationCommandButtonIcon.png"
Image16by16="$webresource:msdyn_LinkToConversationCommandButtonIcon.png"
LabelText="$LocLabels:msdyn.contact.LinkToConversation.Button.LabelText"
Sequence="53" TemplateAlias="o1"
ToolTipTitle="$LocLabels:msdyn.contact.LinkToConversation.Button.ToolTipTitle
"
ToolTipDescription="$LocLabels:msdyn.contact.LinkToConversation.Button.ToolTi
pDescription" />
      </CommandUIDefinition>
    </CustomAction>
```

```
  </CustomActions>
  <Templates>
    <RibbonTemplates Id="Mscrm.Templates"></RibbonTemplates>
  </Templates>
  <CommandDefinitions>
    <CommandDefinition Id="msdyn.contact.LinkToConversation.Button.Command">
      <EnableRules>
        <EnableRule Id="msdyn.contact.EnableInConversationContext.EnableRule"
/>
      </EnableRules>
      <DisplayRules />
      <Actions>
        <JavaScriptFunction
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.linkRecordToConversat
ion" Library="$webresource:msdyn_OmnichannelLinkCommand.js">
          <StringParameter
Value="msdyn_contact_msdyn_ocliveworkitem_Customer" />
        </JavaScriptFunction>
      </Actions>
    </CommandDefinition>
  </CommandDefinitions>
  <RuleDefinitions>
    <TabDisplayRules />
    <DisplayRules />
    <EnableRules>
      <EnableRule Id="msdyn.contact.EnableInConversationContext.EnableRule">
        <CustomRule
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.shouldDisplayLinkComm
and" Library="$webresource:msdyn_OmnichannelLinkCommand.js" Default="false"
/>
      </EnableRule>
    </EnableRules>
  </RuleDefinitions>
  <LocLabels>
    <LocLabel Id="msdyn.contact.LinkToConversation.Button.Alt">
      <Titles>
        <Title description="Link to conversation" languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel Id="msdyn.contact.LinkToConversation.Button.LabelText">
      <Titles>
        <Title description="Link to Conversation" languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel
Id="msdyn.contact.LinkToConversation.Button.ToolTipDescription">
      <Titles>
        <Title description="Link to Conversation tooltip description"
languagecode="1033" />
      </Titles>
    </LocLabel>
    <LocLabel Id="msdyn.contact.LinkToConversation.Button.ToolTipTitle">
      <Titles>
        <Title description="Link to conversation" languagecode="1033" />
      </Titles>
```

```
    </LocLabel>
  </LocLabels>
</RibbonDiffXml>
```

To learn more, see Define ribbon actions.

Step 3: Enable display rules

Enable display rule for an entity, and add custom rule within the enable rule tag.

The `<CustomRule>` element calls a function in a JavaScript library that returns a Promise.

Parameter name	Value	Comment
`EnableRuleId`	`msdyn.account.EnableInConversationContext.EnableRule`	
`Library`	`$webresource:msdyn_OmnichannelLinkCommand.js`	In the `<CustomRule>` element
`FunctionName`	`OmniChannelPackage.OmnichannelLinkCommand.shouldDisplayLinkCommand`	In the `<CustomRule>` element

Sample XML to enable display rules

XML

```
<CommandDefinitions>
    <CommandDefinition Id="msdyn.account.LinkToConversation.Command">
      <EnableRules>
        <EnableRule Id="msdyn.account.EnableInConversationContext.EnableRule"
/>
      </EnableRules>
      <DisplayRules />
      <Actions>
        <JavaScriptFunction
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.linkRecordToConversat
ion" Library="$webresource:msdyn_OmnichannelLinkCommand.js">
          <StringParameter
Value="msdyn_account_msdyn_ocliveworkitem_Customer" />
        </JavaScriptFunction>
      </Actions>
    </CommandDefinition>
  </CommandDefinitions>
  <RuleDefinitions>
```

```
    <TabDisplayRules />
    <DisplayRules />
    <EnableRules>
      <EnableRule Id="msdyn.account.EnableInConversationContext.EnableRule">
        <CustomRule
FunctionName="OmniChannelPackage.OmnichannelLinkCommand.shouldDisplayLinkComm
and" Library="$webresource:msdyn_OmnichannelLinkCommand.js" Default="false"
/>
      </EnableRule>
    </EnableRules>
```

To learn more, see Define ribbon display rules

Step 4: Import the ribbon

In this step you need to import the customized ribbon.

To learn more, see Import the ribbon.

See also

Export, prepare to edit, and import the ribbon

Define ribbon enable rules

Pass data from a page as a parameter to Ribbon Actions

Start a chat

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Follow these steps to start a chat:

1. Listen to the **lcw:ready** event raised by a live chat to start using the live chat SDK methods. The live chat methods should be invoked after the **lcw:ready** event is raised. You can listen for this event by adding your own event listener on the window object.

2. After the **lcw:ready** event is raised, call the startChat method to start a chat.

   To authenticate a customer when you start a chat, see Send authentication token.

   To start a chat proactively depending on various customer scenarios in your organization, see Start a chat proactively.

Sample code

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
    // Handle LiveChat SDK ready event
    // SDK methods are ready for use now
    // Initiate a chat using startChat SDK
    Microsoft.Omnichannel.LiveChatWidget.SDK.startChat();
});

window.addEventListener("lcw:error", function
handleLivechatErrorEvent(errorEvent){
    // Handle LiveChat error event
    console.log(errorEvent);
});
```

Consider a scenario where the customer is on your portal page, and you want to start a chat after the customer has spent some time on the page. You can programmatically open the chat widget after the specified time has elapsed.

The following sample code shows how you can start a chat after the customer has been waiting for 5 minutes:

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
    // Open chat widget proactively after customer has been waiting for 5
minutes
    setTimeout(function startProactiveChat() {
        Microsoft.Omnichannel.LiveChatWidget.SDK.startChat();
    }, 300000);
});
```

Use custom chat button

To use a custom chat button instead of the out-of-the-box chat button, add the attribute `data-hide-chat-button` in the widget snippet and set its value to `true`. Invoke the startChat method on click of the custom UI component to start the chat.

Sample code snippet to hide the standard chat button

`<script id="Microsoft_Omnichannel_LCWidget" src="<valid-src>" data-app-id="<valid-app-id>" data-org-id="<valid-org-id>" data-org-url="<valid-org-url>" data-hide-chat-button="true"></script>`

See also

startChat
JavaScript API reference for Live Chat SDK
Customize chat widget
Start a chat proactively

Start a chat proactively

Article • 09/21/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can help improve customer satisfaction by anticipating areas where customers need help, and then engaging them through chat when they've been browsing your website for some time.

Consider the following scenarios for proactively starting a chat.

> **Note**
>
> The code samples listed in the following scenarios use the **setContextProvider API** that can be used for unauthenticated chat only. For authenticated chat, you must use the JSON Web Token (JWT). More information: **Send authentication tokens**

Scenario 1: Customer wait time

Amy has accidentally damaged a Surface Book and is on the product knowledge base trying to seek answers for about 20 seconds. A proactive chat request is triggered based on the product page that Amy was browsing and the time spent on the page.

```
Hi! Just checking in to see if I can help answer any questions you may have.
```

Amy can accept the chat offer and start the conversation to sort out the issue.

Sample code

HTML

```
<!-- Code to show proactive chat invite after visitor has spend given time
on the webpage -->
<script id="Proactivechattrigger">
    // Wait for Chat widget to load completely
```

```
    window.addEventListener("lcw:ready", function handleLivechatReadyEvent()
{
        var timeToWaitBeforeOfferingProactiveChatInMilliseconds =
20000;//time to wait before Offering proactive chat to webpage visitor
        // Setting context variables
        Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
            return {
                'Proactive Chat':{'value':'True','isDisplayable':true},
                'Time On Page':{'value':
timeToWaitBeforeOfferingProactiveChatInMilliseconds ,'isDisplayable':true},
                'Page URL':{'value':
window.location.href,'isDisplayable':true},
            };
        });

        //Display proactive chat invite after
'timeToWaitBeforeOfferingProactiveChatInMilliseconds' milliseconds
        setTimeout(function(){

Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat({message: "Hi!
Just checking in to see if I can help answer any questions you may have."},
false)
        },timeToWaitBeforeOfferingProactiveChatInMilliseconds);
    });
</script>
```

Scenario 2: Customer visits a webpage multiple times

Thomas is browsing through the Microsoft Surface community webpage and is looking for information on Microsoft Surface device. Thomas has visited a webpage multiple times but is not able to find the answers.

Realizing this scenario, the organization offers a chat request to the customer with the following message.

```
Hi! Do you have a question on Surface device ? I am here to help.
```

Sample code

HTML

```
<!-- Code to show proactive chat invite(after given time) after visitor
visits the webpage given number of time -->
```

```
<!-- Operations on cookies like creating cookies, deleting cookies etc.. -->
<script>
var expdate = new Date ();
expdate.setTime (expdate.getTime() + (24 * 60 * 60 * 1000*365)); // 1 yr
from now
/* ######################## start set cookie  ######################## */
function setCookie(name, value, expires, path, domain, secure) {
  var thisCookie = name + "=" + escape(value) +
      ((expires) ? "; expires=" + expires.toGMTString() : "") +
      ((path) ? "; path=" + path : "") +
      ((domain) ? "; domain=" + domain : "") +
      ((secure) ? "; secure" : "");
  document.cookie = thisCookie;
}

/* ######################## start get cookie value ######################## */
function getCookieVal (offset) {
  var endstr = document.cookie.indexOf (";", offset);
  if (endstr == -1)
    endstr = document.cookie.length;
  return unescape(document.cookie.substring(offset, endstr));
/* ######################## end get cookie value ######################## */
}

/* ######################## start get cookie (name) ########################
*/
function GetCookie (name) {
  var arg = name + "=";
  var alen = arg.length;
  var clen = document.cookie.length;
  var i = 0;
  while (i < clen) {
    var j = i + alen;
    if (document.cookie.substring(i, j) == arg)
      return getCookieVal (j);
    i = document.cookie.indexOf(" ", i) + 1;
    if (i == 0) break;
  }
  return null;
}
/* ######################## End get cookie (name) ######################## */

/* ######################## Start delete cookie ######################## */
function DeleteCookie (name,path,domain) {
  if (GetCookie(name)) {
    document.cookie = name + "=" +
      ((path) ? "; path=" + path : "") +
      ((domain) ? "; domain=" + domain : "") +
      "; expires=Thu, 01-Jan-70 00:00:01 GMT";
  }
}
/* ######################## End of delete cookie ######################## */

/* ######################## Count number of visits to current webpage
######################## */
```

```
function VisitCounter(){
var visits = GetCookie("timesPageVisited");
if (!visits) { visits = 1;
document.write("Select a Conversation Space");
}
else {
visits = parseInt(visits) + 1;document.write("Select a Conversation
Space.");}
setCookie("timesPageVisited", visits,expdate);
}
/* ######################## End of count number of visits to current webpage
######################## */
</script>


<!-- Count number of visits to current webpage -->
<script>
VisitCounter();
</script>

<script id="Proactivechattrigger">
    // Wait for Chat widget to load completely
    window.addEventListener("lcw:ready", function handleLivechatReadyEvent()
{
        // setting Context variables
        Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
            return {
                'Proactive Chat':{'value':'True','isDisplayable':true},
                'No. of visits':{'value':'2','isDisplayable':true},
                'Forums':{'value':'Surface Devices','isDisplayable':true},
            };
        });

        setTimeout(function(){
            var timeToWaitBeforeOfferingProactiveChatInMilliseconds =
5000;//Time to wait before offering proactive chat to webpage visitor
            var visits = GetCookie("timesPageVisited");
            //Check if webpage has been visited 2 or more times by the user.
            if (visits > 2) {
                //Display proactive chat invite

Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat({message: "Hi!
Do you have a question on Surface device? I am here to help."}, false);
                DeleteCookie("timesPageVisited");//Delete the cookie to
reset the counter
            }
        },timeToWaitBeforeOfferingProactiveChatInMilliseconds);
    });
</script>
```

Scenario 3: Customer checks status of open support case

Jacob is browsing through the support page for Microsoft Surface devices to find more information regarding the open support case. Jacob has been on the page for 10 seconds, and is then offered a proactive chat with the following message.

```
Hi! How are you doing today? The status of the case:<caseid> is in progress. Would you like to get more details?
```

Sample code

HTML

```
<!--Code to show proactive chat invite after visitor has spend given time on the webpage, with relevant details about user.-->
<script id="Proactivechattrigger">
    // Wait for Chat widget to load completely
    window.addEventListener("lcw:ready", function handleLivechatReadyEvent()
{
        var timeToWaitBeforeOfferingProactiveChatInMilliseconds =
10000;//Time to wait before offering proactive chat to webpage visitor
        var caseId = '< your case id relevant to the user.>';//Set case id
relevant to the user.
        // setting Context variables
        Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
            return {
                'Proactive Chat':{'value':'True','isDisplayable':true},
                'Case Id':{'value':caseId,'isDisplayable':true}
            };
        });

        //Show proactive chat invite after
'timeToWaitBeforeOfferingProactiveChatInMilliseconds' milliseconds
        setTimeout(function(){

Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat({message: "Hi!
How are you doing today? The status of the case: " + caseId + " is in
progress. Would you like to get more details?"}, false)
        },timeToWaitBeforeOfferingProactiveChatInMilliseconds);
    });
</script>
```

Scenario 4: Customer tries to leave a webpage after spending some time on it

Amy has been browsing a webpage for 15 seconds and is not satisfied with the available information. When Amy is about to switch tabs on the web browser, a proactive chat request with the following message is sent to Amy.

```
Hi! Just checking in to see if I can help answer any questions you may have.
```

Sample code

JavaScript

```
//Code to show proactive chat invite when visitor tries to leave page after spending given time (15 seconds in this case) on the webpage. This invite is offered once and only for the first time. All subsequent tries to leave page are ignored and proactive chat is not offered in them.
<script id="Proactivechattrigger">
    //Track if proactive chat has been already offered to the visitor
    var hasProactiveChatBeenOffered = false;
    //Wait for Chat widget to load completely
    window.addEventListener("lcw:ready", function handleLivechatReadyEvent()
{
        var
timeToWaitBeforeEnablingOfferingProactiveChatInMillisecondsOnLeaving =
15000; //Time to wait before Offering proactive chat to webpage visitor

        //Enable showing proactive chat invite on leaving page after
browsing page for
'timeToWaitBeforeEnablingOfferingProactiveChatInMillisecondsOnLeaving'
milliseconds
        setTimeout(function(){
            //Show proactive chat invite on leaving page
            window.document.body.onmouseleave = function(){
                //Offer proactive chat if it has not been offered earlier
during this visit
                if( hasProactiveChatBeenOffered == false )
                {
                    // Set this to true as proactive chat has been almost
offered.
                    hasProactiveChatBeenOffered = true;
                    //Setting Context variables

Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
                        return {
                            'Proactive Chat':
{'value':'True','isDisplayable':true},
```

```
                            'Page URL':{'value':
window.location.href,'isDisplayable':true},
                        };
                    });
                    //Offer proactive chat

Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat({message: "Hi!
Just checking in to see if I can help answer any questions you may have."},
false);
                }
            };

},timeToWaitBeforeEnablingOfferingProactiveChatInMillisecondsOnLeaving);
    });
</script>
```

Scenario 5: Customer browsed another webpage and then spends time on the current webpage

Amy has browsed the FAQ's document of the product and is currently on the Knowledge Base page for more than 15 seconds. Amy is proactively offered a chat session with the following message.

```
Hi! Just checking in to see if I can help answer any questions you may have.
```

Sample code

JavaScript

```
//Code to show proactive chat invite when visitor spends given time on
current page, after coming from given last visited page
<script id="Proactivechattrigger">
    var lastVisitedPage = "www.contoso.com/FAQ";// last visited page. A
visitor coming form this page will be shown proactive chat invite after
given time on current page
    // Wait for Chat widget to load completely
    window.addEventListener("lcw:ready", function handleLivechatReadyEvent()
{
        var timeToWaitBeforeOfferingProactiveChat = 15000;//Time to wait
before Offering proactive chat to webpage visitor
        //Check if referrer page( read:
https://www.w3schools.com/jsref/prop_doc_referrer.asp ) is same as last
Visited page
        if( window.document.referrer == lastVisitedPage) )
```

```
        {
            //Show proactive chat invite after browsing page for
'timeToWaitBeforeOfferingProactiveChat' milliseconds
            setTimeout(function(){
                //Setting Context variables

Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
                return {
                            'Proactive Chat':
{'value':'True','isDisplayable':true},
                            'Page URL':{'value':
window.location.href,'isDisplayable':true},
                            'Last Page URL':{'value':
window.document.referrer,'isDisplayable':true}
                        };
                });
                //Offer proactive chat

Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat({message: "Hi!
Just checking in to see if I can help answer any questions you may have."},
false);
            },timeToWaitBeforeOfferingProactiveChat);
        }
    });
</script>
```

Scenario 6: Customer signs in from a specific geographic region

Klarissa logs in to your website from Ruritania where your company is running a special discount on products. You can set up a trigger for customers coming from a particular location that proactively starts a chat session. Klarissa is prompted to chat with the following message.

```
Hi! Just checking in to see if I can help answer any questions you may have.
```

Sample code

This sample code shows how you can use Bing's Geolocation APIs to know the geographic region of the customer and offer chat request based on that. More information about Bing's location APIs: Bing Maps Locations API.

JavaScript

```
//Code to show proactive chat invite if visitor is visiting the page in a
particular country or region
<script id="Proactivechattrigger">
    // Wait for Chat widget to load completely
    window.addEventListener("lcw:ready", function handleLivechatReadyEvent()
{
        var countryNameWhereProactiveChatInviteShouldBeOffered =
'Ruritania';//Country name where proactive chat invite should be offered, if
user is visiting webpage from this country

        // Get Country name using Bing Geolocation API and proactively offer
chat if visitor's country matches with given country name
        function
GetCountryUsingBingGeoLocationAPIAndOfferProactiveChatIfVisitorCountryMatche
sWithGivenCountry( latitude, longitude, bingMapApiKey, countryToMatch) {
            var xhttp = new XMLHttpRequest();
            xhttp.onreadystatechange = function() {
            if (this.readyState == 4)
                if(this.status == 200) {
                    console.log(this.responseText);
                    var currentCountryName =
JSON.parse(this.responseText).resourceSets[0].resources[0].address.countryRe
gion;
                    //Check if visitor's country matches with given Country
name
                    if( currentCountryName == countryToMatch){
                        alert(currentCountryName);
                        // setting Context variables

Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
                            return {
                                'Proactive Chat':
{'value':'True','isDisplayable':true},
                                'Country':{'value': currentCountryName
,'isDisplayable':true},
                                'Page URL':{'value':
window.location.href,'isDisplayable':true},
                            };
                        });
                        //Show proactive chat invite

Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat({message: "Hi!
Just checking in to see if I can help answer any questions you may have."},
false);
                    }
                }
                else{
                    console.log("Bing Geolocation API call has failed and
returned error: " + this.statusText);
                }
            };
            xhttp.open("GET",
'https://dev.virtualearth.net/REST/v1/Locations/'+ latitude +','+ longitude
```

```
+'?key='+ bingMapApiKey, true);
            xhttp.setRequestHeader("Content-type", "application/json");
            xhttp.send();
        }

        //fetching latitude and longitude is success
        function successGetlatLong(position) {
            var latitude = position.coords.latitude;
            var longitude = position.coords.longitude;
            console.log('Your latitude is :'+latitude+' and longitude is
'+longitude);
            //convert current loaction to a country/ region via Bing
Geolocation APIs
            var bingMapApiKey = 'Enter your Bing Map API key';// Get Bing
Map API key here : https://learn.microsoft.com/bingmaps/getting-
started/bing-maps-dev-center-help/getting-a-bing-maps-key

GetCountryUsingBingGeoLocationAPIAndOfferProactiveChatIfVisitorCountryMatche
sWithGivenCountry( latitude, longitude, bingMapApiKey,
countryNameWhereProactiveChatInviteShouldBeOffered);// get Country name
using Bing Geolocation API and offer proctiveChat if visitor's country
matches with Country name where proactive chat invite should be offered
        }

        //fetching latitude and longitude has failed
        function errorGetlatLong() {
            console.log('It seems browser was not allowed to access
location. Please allow browser to access location.');
        }

        //fetch latitude and longitude via browser
        if (navigator.geolocation) {
            navigator.geolocation.getCurrentPosition(successGetlatLong,
errorGetlatLong);
        } else {
            console.log('It seems like Geolocation, which is required for
this page, is not enabled in your browser. Please use a browser which
supports it.');
        }
    });
</script>
```

Scenario 7: Proactively offer chat to customers within a certain time period

Suppose your organization is running a festive season sale between certain dates, and you want to proactively offer chat requests to customers to see if they have any questions.

Sample code

The following sample code shows how you can proactively offer chat invites to customers when they visit your website in a time period.

JavaScript

```
//Code to show proactive chat invite if visitor visits webpage between given time period
<script id="Proactivechattrigger">
    // Wait for Chat widget to load completely
    window.addEventListener("load", function handleLivechatReadyEvent() {//lcw:ready
        var startTimeOfTimePeriod = new Date('01 Jan 2019 00:00:00 GMT');//start time of time period in which proactive chat will be shown to webpage visitor
        var endTimeOfTimePeriod = new Date('01 Jan 2100 00:00:00 GMT');//end time of time period in which proactive chat will be shown to webpage visitor
        var currentDateTime = new Date();//current date and time

        //Make sure that endTimeOfTimePeriod is always greater and equal to startTimeOfTimePeriod
        if( endTimeOfTimePeriod < startTimeOfTimePeriod)
        {
            console.log("The time period given for proactive chat has start time: " + startTimeOfTimePeriod.toGMTString() + " more that the end time: " + endTimeOfTimePeriod.toGMTString() + " of time period. So, proactive chat will not be offered.");
            return;
        }

        //Check if current date time is between given time period
        if( startTimeOfTimePeriod < currentDateTime && endTimeOfTimePeriod > currentDateTime){
            // setting Context variables

Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function contextProvider(){
                return {
                    'Proactive Chat':{'value':'True','isDisplayable':true},
                    'Page URL':{'value': window.location.href,'isDisplayable':true},
                };
            });
            //Show proactive chat invite

Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat({message: "Hi! Just checking in to see if I can help answer any questions you may have."}, false);
        }
    });
</script>
```

Scenario 8: Proactively offer chat with pre-survey to customers

Suppose your organization wants consent authorization to start a chat with a customer or wants to ask about the topics related to the customer's enquiry before routing the session to the appropriate agent.

Sample code

The following sample code shows how you can proactively offer chat with a pre-survey question to your customers.

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
 Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat(
 "Hi! How are you doing today? Do you wish to start a chat?",
 true);
 });
```

See also

startProactiveChat API
Manage custom context
Start a chat
Display custom context
Live chat JavaScript API reference

Send authentication token

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

To authenticate a customer when they start a chat, pass an authentication token to Omnichannel for Customer Service. This token is used to validate a signed-in customer from a domain, and to extract information based on the context variables that are defined. Custom authentication is optional and is relevant only when the chat widget is hosted outside Power Apps portals.

> **Important**
>
> - In the payload of the JSON Web Token (JWT), the value provided for the `lwicontexts` key should be the serialized custom context.
> - The custom context is a collection of key/value pairs. Only primitive values are allowed for any key.
> - The keys of custom context must correspond to context variables that are created for the associated workstream in Omnichannel for Customer Service.
> - The authentication token provider would be invoked by live chat widget when starting a new chat.

The SDKs related to authentication token provider are applicable only if authentication is enabled for the widget. To enable authentication for your widget, see Create chat authentication settings.

Follow these steps to send an authentication token when you start a chat:

1. Generate a valid JWT from the JSON payload. More information: setAuthTokenProvider
2. The live chat methods should be invoked after the lcw:ready event is raised. You can listen for this event by adding your own event listener on the window object.

3. After the `lcw:ready` event is raised, register an authentication token provider with live chat by using the setAuthTokenProvider method.

> **Note**
>
> To avoid timeout, the **authTokenProvider** function in the **setAuthTokenProvider** method must respond within 10 seconds.

4. Use the startChat method to start the chat.

Sample code

JavaScript

```
let payloadToEncrypt = {
    "sub" : "87b4d06c-abc2-e811-a9b0-000d3a10e09e",
    "lwicontexts" :"{\"msdyn_cartvalue\":\"10000\",
\"msdyn_isvip\":\"false\"}",
    "iat" : 1542622071,
    "iss" : "contosohelp.com",
    "exp" : 1542625672,
    "nbf" : 1542622072
};

function convertToJwtToken(payloadToEncrypt){
  // Ideally, you should call your service to convert the payload to a valid
JWT token
  return
Promise.resolve("eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJzdWIiOiI4N2I0ZDA2Yy
1hYmMyLWU4MTEtYTliMC0wMDBkM2ExMGUwOWUiLCJsd2ljb250ZXh0cyI6IntcIm1zZHluX2Nhcn
R2YWx1ZVwiOlwiMTAwMDBcIiwgXCJtc2R5bl9pc3ZpcFwiOlwiZmFsc2VcIn0iLCJpYXQiOjE1ND
I2MjIwNzEsImlzcyI6ImNvbnRvc29oZWxwLmNvbSIsImV4cCI6MTU0MjYyNTY3MiwibmJmIjoxNT
QyNjIyMDcyfQ.r37z1M5rMyRYMOJ-rhyTRYFOgvl9N7KvTMueSFPkiuM");
}

function authTokenProvider(callback){
    convertToJwtToken(payloadToEncrypt).then(function (jwtToken){
    // Calling the callback with the valid JWT token
   callback(jwtToken);
   });
}

window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
    // Handle live chat ready event
    // Can use the SDK methods now
    // Setting authentication token provider to be used for the chat

Microsoft.Omnichannel.LiveChatWidget.SDK.setAuthTokenProvider(authTokenProvi
der);
```

```
   // Starting a new chat
   Microsoft.Omnichannel.LiveChatWidget.SDK.startChat();
});

window.addEventListener("lcw:error", function
handleLivechatErrorEvent(errorEvent){
  // Handle livechat error event
   console.log(errorEvent);
});
```

See also

setAuthTokenProvider
getAuthTokenProvider
removeAuthTokenProvider
Live chat SDK JavaScript API reference
Send custom context

Configure automatic closure of conversations using web API

Article • 09/29/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article demonstrates how you can configure the auto-close duration of a conversation using the Web API.

> **Important**
>
> Duration-based automatic closure of conversations isn't supported for records that're configured for unified routing. When you delete a routed record, the associated queue item is deleted. The live work item or conversation will also be deleted as part of the clean-up process.

Use the following `GET` request to fetch all the configuration records that have been defined out of the box.

Request

```HTTP
GET [Organization URI]/api/data/v9.1/msdyn_occhannelstateconfigurations
Accept: application/json
OData-MaxVersion: 4.0
OData-Version: 4.0
If-None-Match: null
```

Response

```HTTP
{
   "@odata.context":"[Organization
URI]/api/data/v9.1/$metadata#msdyn_occhannelstateconfigurations",
   "value":[
```

```
      {
         "@odata.etag":"W/\"1379367\"",
         "_organizationid_value":"758f70a9-7aba-4764-bdda-fcc0023a702f",
         "msdyn_name":"Live Chat - Open",
         "statecode":0,
         "statuscode":1,
         "_msdyn_occhannelconfigurationid_value":"836717fd-5578-e911-8196-
000d3af7d71e",
         "msdyn_autocloseliveworkitemafter":20,
         "modifiedon":"2019-10-01T13:41:51Z",
         "_modifiedby_value":"d6e088ce-8866-4b3d-8ea2-150ad72e2b79",
         "msdyn_ocliveworkitemstate":0,
         "msdyn_showconfirmationonsessionclose":false,
         "versionnumber":1379367,
         "msdyn_occhannelstateconfigurationid":"6283ab63-5778-e911-8196-
000d3af7d71e",
         "createdon":"2019-10-01T13:41:51Z",
         "_createdby_value":"d6e088ce-8866-4b3d-8ea2-150ad72e2b79",
         "_modifiedonbehalfby_value":null,
         "importsequencenumber":null,
         "overriddencreatedon":null,
         "_createdonbehalfby_value":null,
         "utcconversiontimezonecode":null,
         "timezoneruleversionnumber":null
      },
      {
         "@odata.etag":"W/\"1379368\"",
         "_organizationid_value":"758f70a9-7aba-4764-bdda-fcc0023a702f",
         "msdyn_name":"Live Chat - Active",
         "statecode":0,
         "statuscode":1,
         "_msdyn_occhannelconfigurationid_value":"836717fd-5578-e911-8196-
000d3af7d71e",
         "msdyn_autocloseliveworkitemafter":null,
         "modifiedon":"2019-10-01T13:41:51Z",
         "_modifiedby_value":"d6e088ce-8866-4b3d-8ea2-150ad72e2b79",
         "msdyn_ocliveworkitemstate":1,
         "msdyn_showconfirmationonsessionclose":true,
         "versionnumber":1379368,
         "msdyn_occhannelstateconfigurationid":"e2737c9a-5778-e911-8196-
000d3af7d71e",
         "createdon":"2019-10-01T13:41:51Z",
         "_createdby_value":"d6e088ce-8866-4b3d-8ea2-150ad72e2b79",
         "_modifiedonbehalfby_value":null,
         "importsequencenumber":null,
         "overriddencreatedon":null,
         "_createdonbehalfby_value":null,
         "utcconversiontimezonecode":null,
         "timezoneruleversionnumber":null
      },
   ]
}
```

The `msdyn_name` attribute in the `msdyn_occhannelstateconfiguration` entity mentions the channel and state of the conversation. For more information about conversation states, see Understand conversation states in Omnichannel for Customer Service.

You can make a `GET` request to the `msdyn_occhannelconfiguration` entity to fetch all the existing channel records. For each of these channels, you can see its state when you query the `msdyn_occhannelstateconfiguration` entity.

Make a `PATCH` request to the `msdyn_occhannelstateconfiguration` entity record and update the value of the `msdyn_autocloseliveworkitemafter` attribute.

HTTP

```
PATCH [Organization
URI]/api/data/v9.1/msdyn_occhannelstateconfigurations(6283ab63-5778-e911-
8196-000d3af7d71e)
Accept: application/json
OData-MaxVersion: 4.0
OData-Version: 4.0
If-None-Match: null

{
    "msdyn_autocloseliveworkitemafter":5
}
```

Here's a sample code for updating existing records in the `msdyn_occhannelstateconfigurations` entity:

JavaScript

```
var data =
    {
        "msdyn_autocloseliveworkitemafter": 2
    }
// update the record
Xrm.WebApi.updateRecord("msdyn_occhannelstateconfiguration", "6283ab63-5778-
e911-8196-000d3af7d71e", data).then(
    function success(result) {
        console.log("Auto close time updated");
    },
    function (error) {
        console.log(error.message);
    }
);
```

> **Note**

The value for the `msdyn_autocloseliveworkitemafter` attribute is in minutes. If you want to provide a value that is in days, you'll have to convert it into minutes. For example, 1 day will be 24 x 60 = 1,440 minutes.

The conversation closes automatically if the value of the `msdyn_autocloseliveworkitemafter` attribute is greater than the value of the `createdon` attribute.

If the conversation is in the wrap-up state—that is, the agent has resolved the issue and can now perform some post-conversation steps to close the conversation—then the conversation is closed if the value of the `msdyn_autocloseliveworkitemafter` attribute is greater than the value of the `wrapupinitiatedon` attribute.

> **Important**
>
> The decision to close a conversation based on the values of the `msdyn_autocloseliveworkitemafter` and `createdon` attributes is made when a scheduled job runs, and not when the `PATCH` Web API request is run.

Configure automatic closure of Wrap-up state for live chat

The default time for automatically closing a live chat that's in **Wrap-up** state is 15 minutes. The value is defined in the `msdyn_autocloseliveworkitemafter` attribute and can be programmatically changed to suit your business needs.

The value defined for the **Block capacity for wrap-up** field in the workstream overrides the value specified in the `msdyn_autocloseliveworkitemafter` attribute, if it is more than the value for the `msdyn_autocloseliveworkitemafter` attribute. For example, if you have set the value for blocking agent's capacity as 15 minutes and the `msdyn_autocloseliveworkitemafter` attribute as 10 minutes, a conversation in **Wrap-up** state will occupy capacity for 15 minutes and will be eligible for automatic closure only after 15 minutes.

Next steps

Update an entity using Web API

See also

Automatic closure of conversations

Send custom context

Article • 08/30/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The custom context is a collection of key or value pairs. Only primitive values are allowed for any key. The keys must correspond to context variables that are created for the associated workstream. If no context variables have been created under live workstream with a matching logical name, variables are created at runtime assuming the type as String. The custom context provider would be invoked by the live chat widget when a new chat is started. Because the values are case-sensitive, use exact match to pass them to the context variables. More information: Considerations for context variables

> **Important**
>
> - The **setContextProvider** is supported only for unauthenticated chat. For authenticated chat, you must use the JSON Web Token (JWT). More information: **Send authentication tokens**
> - You can pass only 100 custom context variables during each chat session.

When a customer starts a chat from the portal, you can pass custom context to Omnichannel for Customer Service. This custom context can be used to display information on the user interface and to create routing rules that eventually determine the queue to which you must route the chats.

Follow these steps to send custom context when you start a chat:

1. The live chat SDK methods should be invoked after the lcw:ready event event is raised. You can listen for this event by adding your own event listener on the window object.
2. After the `lcw:ready` event is raised, register a custom context provider with live chat using the setContextProvider method.
3. Start the chat using the startChat method.

Sample code

JavaScript

```
function contextProvider(){
    //Here it is assumed that the corresponding work stream would have
context variables with logical name of 'contextKey1', 'contextKey2',
'contextKey3'. If no context variable exists with a matching logical name,
items are created assuming Type:string
    return {
            'contextKey1': 'contextValue1', // string value
            'contextKey2': 12.34, // number value
            'contextKey3': true // boolean value
    };
}

window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
    // Handle LiveChat Ready event
    // SDK methods are ready for use now
    // Setting custom context provider to be used with Chat for Dynamics 365
    // The custom context provided by custom context provider can be used
for routing the chat to a particular queue

Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(contextProvider)
;
    // Starting a new chat
    Microsoft.Omnichannel.LiveChatWidget.SDK.startChat();
});

window.addEventListener("lcw:error", function
handleLivechatErrorEvent(errorEvent){
    // Handle LiveChat SDK error event
    console.log(errorEvent);
});
```

For information about how to display the context variables, see Display custom context.

See also

setContextProvider

getContextProvider

removeContextProvider

Live chat SDK JavaScript API reference

Configure context variables for a bot

Display custom context

Article • 03/20/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The data type of the context variables is a JSON object with two properties—`isDisplayable` and `Value`. The JSON object has the following schema.

JavaScript

```
{
            "type": "object",
             "properties": {
                    "isDisplayable": {
                        " description": " Context variable should display in
agent UI or not",
                        "type": "boolean"
                    },
                    "Value": {
                         " description": " Context variable value pass
through bot , this can be string Boolean or number",
                        "type": "string or Boolean or Number"
                    }
                },
                "required": [ "isDisplayable", "Value" ]
        }
```

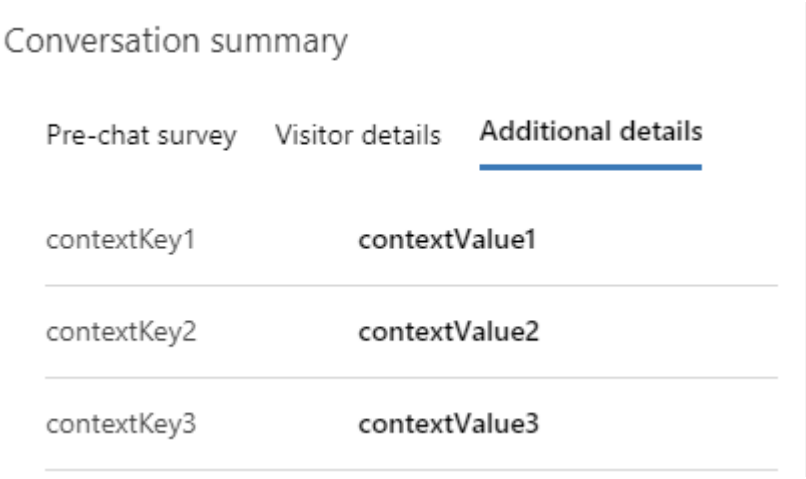
The input value for `isDisplayable` is **Boolean** (true or false). The input value for `Value` can be **Boolean**, **String**, or **Number**.

To display the context variables in the Conversation Summary Control of conversations for Power Virtual Agents and Azure bots, use the `isDisplayable` property in the body of setContextProvider method.

Here's an example: `{\"isDisplayable\":\"true\"," +"\"Value\":\"context variable value as string\"}`

The `isDisplayable` property, when set to `true`, will display the context variables on the third tab of the Conversation Summary Control for a conversation. The `Value` property

of the JSON object includes the user response or any other information in string, Boolean, or number format.



See also

Send custom context
setContextProvider

Omnichannel system customizers

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Overview

Every organization has a unique way of working. Some organizations have well-defined business processes, and some don't. As a system customizer, you can customize the forms for your agents and supervisors to cater to your business process and workflow requirements.

In this section

Use the resources in the following sections to learn how to use Omnichannel for Customer Service for system customizer:

- Customize Active Conversation form
- Customize the session form
- Customize quick view forms

Customize the Active Conversation form

Article • 08/08/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> The **Customer Summary** form is renamed as **Active Conversation** form.

You can customize the following for the **Active Conversation** page:

- Add or remove custom controls
- Add a web resource or iFrame to the form
- Customize the layout
- Add custom fields if the **Customise active conversation form** in Customer Service admin center is enabled.
- Embed canvas apps

> **Note**
>
> - For a conversation entity, you can't add custom forms.
> - We recommend that you don't:
>   - Change the Conversation form or the order in which it's displayed, as it's the default form.
>   - Modify the out-of-the-box JavaScript handlers and web resource used in the Active Conversation form.
>   - Remove the form initiator control from the **Search customer** and **Search issue** lookup controls.

By default, the **Active Conversation** page displays the sections that are listed in this article. For information on how to customize these sections, see Customize quick view forms.

Customer profile

The **Customer profile** section provides details about the customer or account. These details include the name of the customer or account, category or job, title, relationship type, city, and the preferred channel of engagement. You can modify the quick view forms in this section by navigating to the respective entity forms.

Conversation summary

The **Conversation summary** section fetches details based on the context of the incoming conversation request.

This section includes **Pre-chat survey** and **Visitor details**. The details on these tabs help you to understand contextual channel-specific information about the conversation with the customer. The **Pre-chat survey** tab shows responses from the customer on the pre-chat questions.

The **Visitor details** tab provides some information such as the customer is authenticated or not, browser used by the customer for contacting support, an operating system used by the customer, location of the customer, interacting language of the customer, and so on. In addition, conversation and transfer details.

If the customer signs in to the portal to initiate a chat with the support, then as an agent, you can see the **Authenticated** field value as **Yes** in the **Visitor details** tab of the **Conversation summary** section. Otherwise, the **Authenticated** field value is shown as **No**.

Issue snapshot

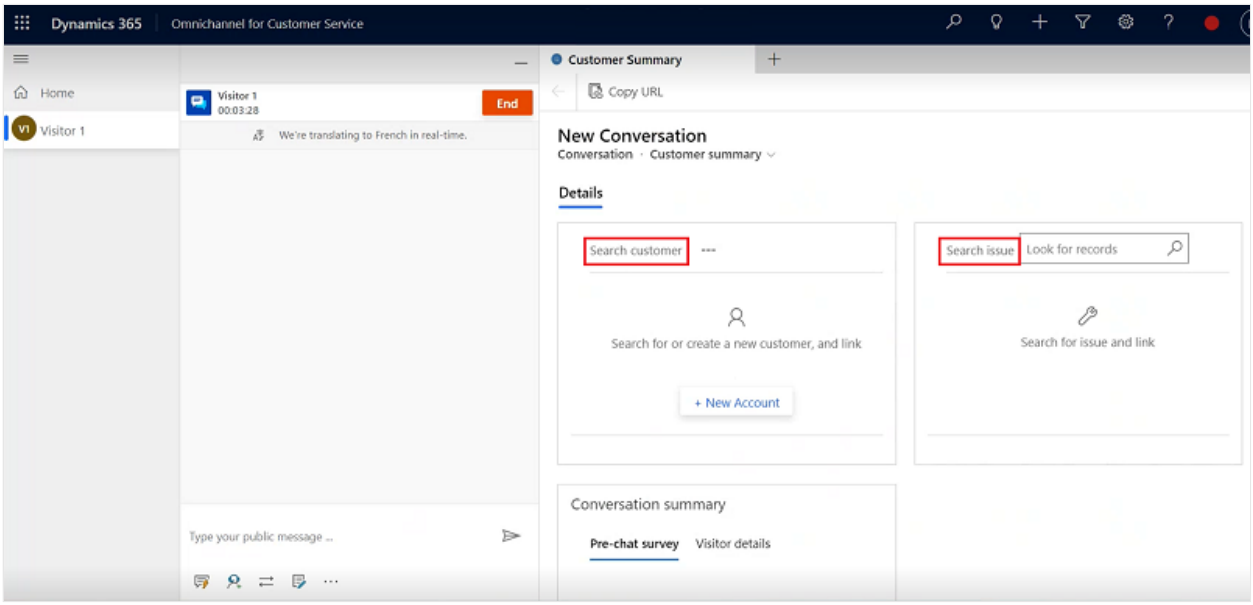
For an incoming conversation request, the system links an existing case to the conversation and shows it on the **Issue Snapshot** section. This section shows information such as the title of the case, the priority, the status of the case, the product, and the owner. You can modify the quick view forms in this section by navigating to the respective entity forms.

Recent cases

This form section displays the recent cases that relate to the customer. You can modify the quick view forms in this section by navigating to the respective entity forms.

Customize the labels for customer, account, and case on the conversation form

You can customize the labels for customer, account, and case that appear on the conversation form so that they are relevant to your business needs. These customizations are applicable to labels such as **Search customer**, **New customer**, **Search issue**, and **New case**. When you update a label, the updated name that you choose will reflect in all occurrences where that name exists.



For example, you could change **Search customer** to **Search client** or **Search issue** to **Search ticket** using the following procedure.

To customize labels on the conversation form:

1. In your Dynamics 365 instance, go to **Customize the System** in **Advanced Settings**, and then select **Web Resources**.

2. Select the filters icon, select the dropdown menu next to the **Type** column, and then select the checkbox for **String (RESX)**.

3. In the **Name** column filter, select **Custom Filter**, and in the dialog that is displayed, set **Select Operator** to **Contains**, and then type **CustomerSummary** for the value. All the CustomerSummary labels for all the languages are displayed.

4. Optionally, use the language filter to narrow the results to show the results for the required language.

5. In the **Name** column, select the **CustomerSummary** label. A dialog opens with the URL link to the content of the CustomerSummaryLabels.resx file.

6. Select the link in the URL field. A dialog opens and displays the contents of the resource file.

    a. Copy and paste the contents into a text editor, and then update the text for the value tag of the labels you want to change with a label of your choice . For example, for **Customer**, update the text in value with "Client". This will replace the "Customer" label with "Client" on the **Active Conversation** form.

    b. Similarly, for the **Issue** tag, update the text in value* with "Ticket". This will replace the "Issue" label with "Ticket" on the **Active Conversation** form.

    The sample tags with the new values are as follows.

```
<data name="Customer" xml:space="preserve">
  <value>Client</value>
  <comment>Client Label</comment>
</data>
<data name="Issue" xml:space="preserve">
  <value>Ticket</value>
  <comment>Issue Label</comment>
</data>
```

7. Save the file locally, and then return to the **CustomerSummaryLabels Web resource** dialog, select **Choose File**, and upload the edited file.

8. Select the recently saved file, select **Save**, and then publish the changes.

9. To view the published changes, in the Customer Service workspace or Omnichannel for Customer Service app, manually refresh the page containing the conversation summary form.

Timeline

This section displays case-related and customer-related activities in the form of a timeline. You can create quick notes based on the discussion with the customer. Use the **Linked records** field to switch the timeline based on the Case, Contact, or Account record linked to the conversation.

You can customize the timeline dropdown labels for case, account, and contact by editing the display name for the corresponding entity and publishing your changes.

Next topic: Customize quick view forms

See also

Omnichannel system customizers
Customize the conversation form
Configure agent and supervisor configurations in Unified Service Desk
Configure notification for agents

Customize quick view forms

Article • 01/29/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can customize the quick view form in the section by navigating to the respective entities and quick view forms. The following are some of the relevant entities.

Card	Entity	Quick View Form
Customer profile	Account > Forms	Customer profile
Customer profile	Contact > Forms	Customer profile
Issue snapshot	Case > Forms	Issue Snapshot
Recent cases	Account > Forms	Cases for customer
Recent cases	Contact > Forms	Cases for customer

The following procedure shows how to modify the **Customer profile** quick view form of the **Account** entity. The process is similar for other forms that are listed in the preceding table.

1. Sign in to the Dynamics 365 instance.
2. Go to **Settings** > **Customization** > **Customize the system**.
3. Expand **Components** > **Entities** > **Account**, and select **Forms**.
4. Select **Customer profile**, which is of the type quick view form.
5. In the form, select the section that you want to customize, such as add a field, and then in the **Field Explorer** pane, double-click the field you want to add to the form. For example, double-click the **Address 1: Address Type** field from the **Field Explorer** pane. The field is added to the section.
6. Select **Save**, and then select **Publish**.

> **Tip**
>
> To edit a quick view form, see **Edit a quick view form**

See also

Omnichannel system customizers
Customize Active Conversation form

Customize session forms

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As a system customizer, you might want to customize the session forms to suit your business requirements for the agents who use Omnichannel for Customer Service and other model-driven apps.

Modify the position of sections in the session form

1. Sign in to the Dynamics 365 instance.
2. Go to **Settings** > **Customization** > **Customize the system**.
3. Expand **Components** > **Entities** > **Session** and then select **Forms**.
4. Select **Omnichannel session form** from the list.
5. Drag and drop the field in the order you want to modify.
6. Select **Save** and select **Publish**.

See also

Omnichannel system customizers
Customize Active Conversation form

Customizations supported by the Conversation table and form

Article • 08/08/2023

This article lists the customizations that you can and can't use with the **Conversation** table (`msdyn_ocliveworkitem`) and the **Conversation** form in Omnichannel for Customer Service.

Customizations supported by the Conversation table

The following table lists the supported customizations.

Components	Add new?	Edit existing?
Form	No	Yes
View	Yes	No
Chart	Yes	No
Column	Yes	No. But you can change some properties of `msdyn_title` and `msdyn_thirdpartyconversations`.
Dashboard	No	No

You can:

- Create business rules.
- Associate a conversation with a lead or opportunity, or any other activity-enabled table via the **Regarding** column that's available for the conversation. You can't:

You can't:

- Add a Many to Many relationship.
- Use custom columns in unified routing or assignment.

We recommend that:

- You don't add a custom column that's set as system required. If you intend to add such a custom column based on your business needs, then you populate the value

for the custom column via sync pre-validation or pre-operation plug-in to ensure its value isn't null.
- You don't create alternate keys.

Customizations supported by the Conversation form

You can customize the **Conversation** form to:

- Load the **Active Conversation** form as an application tab instead of an anchor tab in a session.
- Edit existing forms in the following ways:
  - Add custom controls. However, we recommend that you don't use custom controls to update a conversation because Omnichannel for Customer Service will overwrite the updates when the conversation ends.
  - Edit the quick view for customers and cases.
  - Add web resources and external website controls.
  - Modify the form layout, resize controls, and create tabs and sections.
  - Edit the quick view for customers and cases.
  - Move sections to different tabs.
  - Remove **Recent cases** subgrid.

Additionally, if customize active conversation form is enabled, you can:

- Add subgrids on the **Conversation** form and view data for related tables in the subgrid.
- Edit existing forms in the following ways:
  - Add custom columns and allow saving of custom and standard columns on the form except some of the logical column names listed in the **Logical column** names section.
  - Add canvas apps.
  - Render columns with values on the form.
  - Configure **Customer 360** card and **Case details** card.

We also recommend that you don't:

- Change the **Conversation** form or the order in which it's displayed, as it's the default form.
- Modify the out-of-the-box JavaScript handlers and web resource used in the **Active Conversation** form.
- Remove the form initiator control from the **Search customer** and **Search issue** lookup controls.

Logical column names

Any updates to the following columns aren't supported:

- activityid
- msdyn_activeagentassignedon
- msdyn_activeagentid
- msdyn_activesessionparticipantid
- msdyn_cdsqueueid
- msdyn_channel
- msdyn_closedon
- msdyn_createdon
- msdyn_customerlanguageid
- msdyn_customerlocale
- msdyn_customersentimentlabel
- msdyn_effortpredictionresult
- msdyn_escalationcount
- msdyn_initiatedon
- msdyn_isoutbound
- msdyn_lastsessionid
- msdyn_liveworkstreamid
- msdyn_modifiedon
- msdyn_ocliveworkitemid
- msdyn_overflowtransfercount
- msdyn_queueid
- msdyn_queueitemid
- msdyn_startedon
- msdyn_statusupdatedon
- msdyn_title
- msdyn_transfercount
- msdyn_urcustomersentimentkeywords
- msdyn_urcustomersentimentlabel
- msdyn_urcustomersentimentscore
- msdyn_workstreamworkdistributionmode
- msdyn_wrapupinitiatedon
- ownerid
- statecode
- statuscode
- subject

Next steps

Customize Active Conversation form
Customize quick view forms
Customize session forms

See also

Conversation columns

Embed chat widget in your website or portal

Article • 10/05/2023

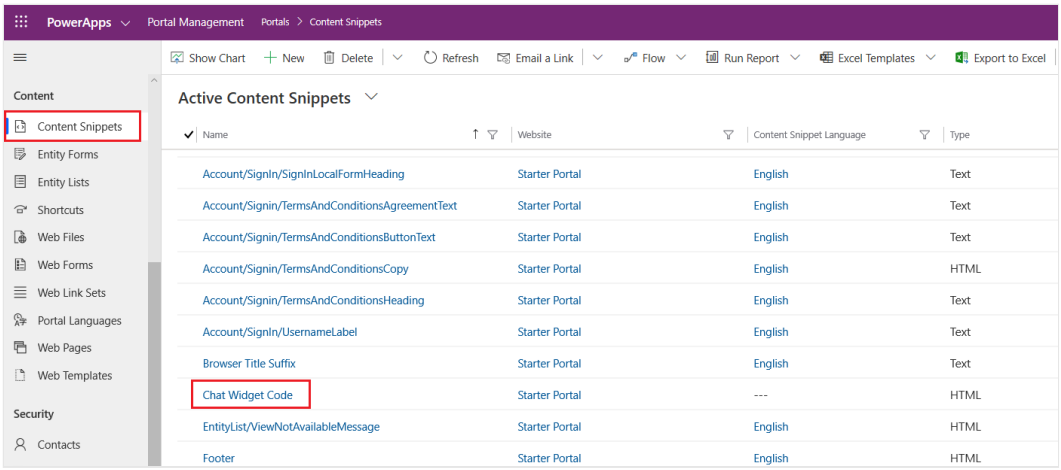
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Embed chat widget in a website or Power Apps portal

Do the following steps to embed the chat widget in a website or Power Apps portal.

1. In Dynamics 365, go to Customer Service admin center.
2. Go to **Channels** > **Chat**.
3. Select the chat instance that you want to embed in your website, and select **Edit**.
4. On the **Chat widget** tab, copy the widget code snippet in the **chat widget** section and then do one or all of the following:
    - To embed chat widget in your website, paste the code in the HTML source <body> of your website.
    - To embed chat widget in your Power Apps portals,
      a. Open the Portal Management app.
      b. Go to **Portal** > **Content Snippets**.

c. Find the **Chat Widget Code** content snippet and open it.



d. On the **General** tab, scroll down to the **Value (HTML)** field, and paste the chat widget snippet code.

e. Save the changes. The chat widget is now embedded into the portal.

If you don't see your chat widget in the portal, see Troubleshoot issues in Omnichannel for Customer Service.

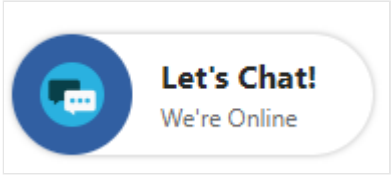
Embed chat widget in mobile experiences

1. Create the code snippet. Refer to Render a live chat widget on the mobile app for samples showing how to enable rendering of the web version of the live chat widget on mobile devices.
2. In Customer Service admin center, go to **Channels** > **Chat**.
3. Open the chat widget you want to embed in your website or create a new one.
4. On the **Chat widget** tab, copy the widget code snippet in the **chat widget** section and paste it in the source code of your mobile operating system.

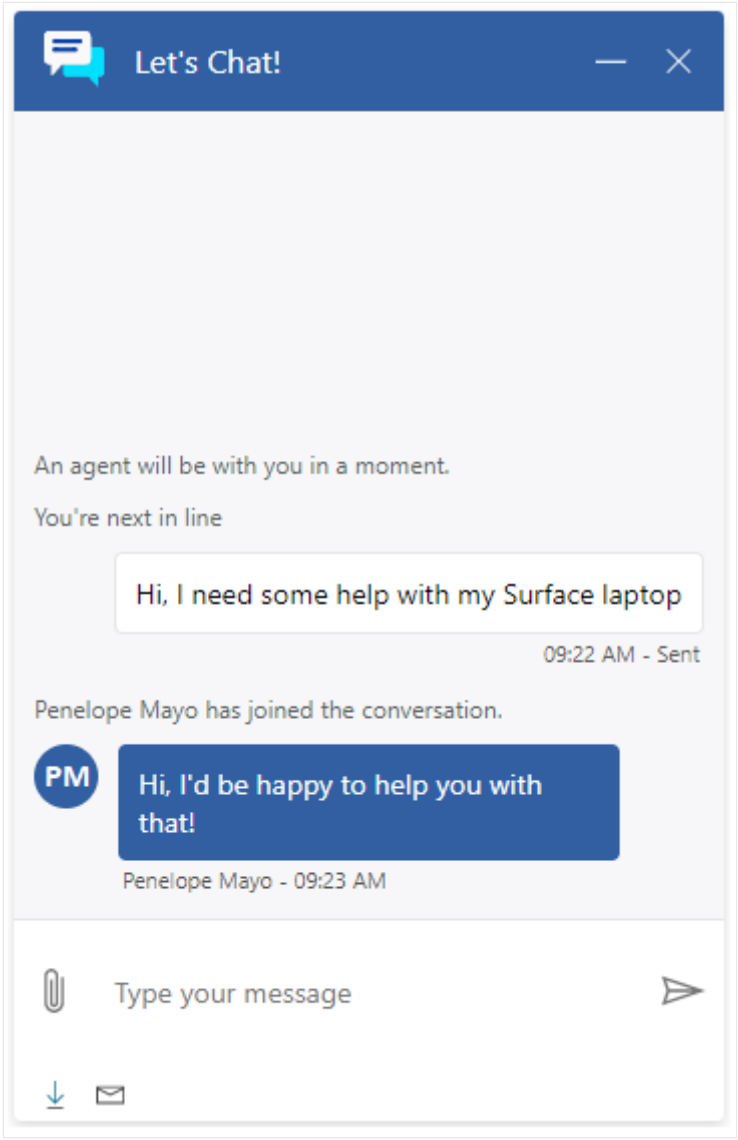
Customer experience of chat widget

After you configure the chat widget, it has the following capabilities:

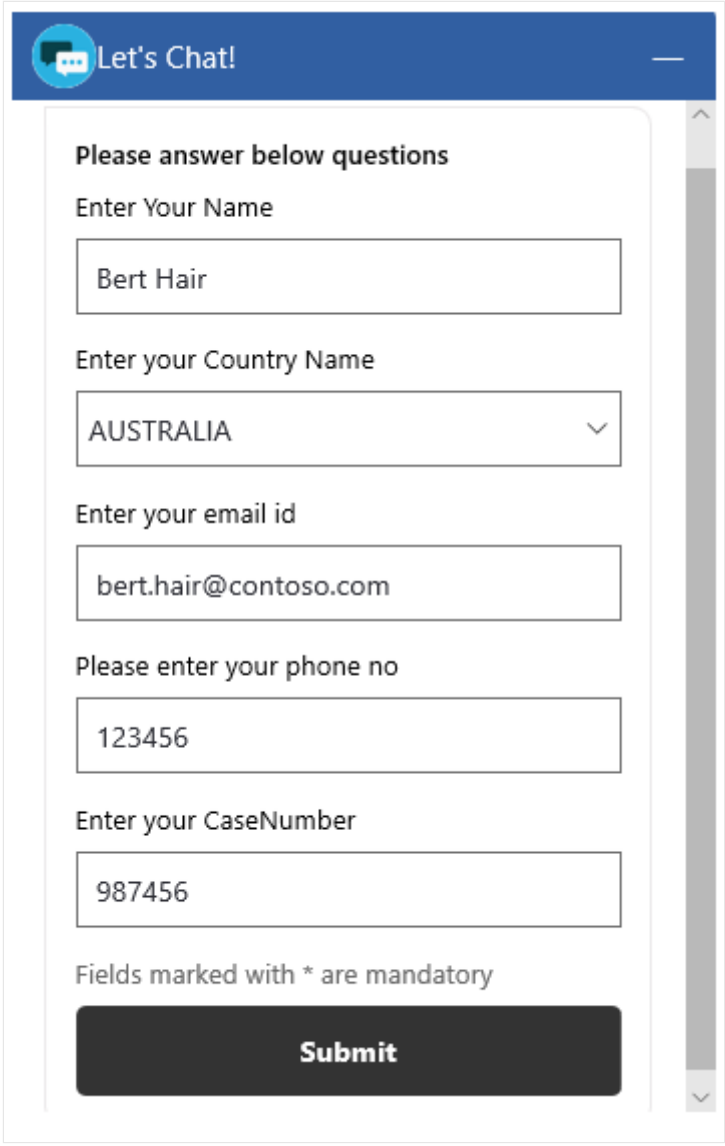
- **Minimized mode**: By default, the chat widget appears in minimized mode. If any messages come while the widget is in the minimized mode, a count of the messages is shown.



- **Maximized mode**: A user can maximize the chat widget to start a conversation with an agent.
- **System events**: System-generated messages appear for events, such as when an agent joins a conversation, or a conversation is transferred by the agent or supervisor to another agent.



- **Keyboard shortcut**: During the chat session, the customer can press **Ctrl+/** to return the cursor to the message send box from elsewhere on the page.
- **Pre-conversation survey**: If a survey is configured by an admin, it appears for the user before the conversation starts. This survey also helps the user connect to an



appropriate agent.

- **End chat**: A customer can end the conversation by selecting the **Close chat** button. A confirmation message appears before the conversation ends.

> ⓘ Note
>
> For advanced configuration like embedding chat widget on specific web pages, see **Create and manage portals**.

See also

Supported browsers for live chat widget
Add a chat widget
Configure a pre-conversation survey
Configure agent display name
Configure file attachment capability
Create quick replies
Create and manage operating hours

Create chat authentication settings

Render a live chat widget on the mobile app

Overview of channels

Article • 10/10/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As new social networks and communication channels rapidly evolve, so do customer expectations on how to reach their favorite brands. Communicating via many channels has become not only comfortable but expected, and businesses seeking to provide personalized services are rapidly working to enable support through the channels their customers want to use.

Adding support channels to your businesses support offering is a powerful way to provide personalized service to customers on the channels of their choice. It is helpful to recognize a common pattern across all channels that are enabled through Omnichannel for Customer Service before diving into the implementation of a single channel. The implementation pattern for out-of-the-box channels is as follows:

- Establish your account and respective requirements (such as a page, and app) with the Channel provider. This ensures you have an entry point with the channel provider through which customers will engage.
- Configure the workstream in Customer Service admin center.
- Configure the Channel in Customer Service admin center and attach it to the workstream.
- Populate the exchange of handshake data (token and secrets) required between Omnichannel and the channel provider. This is usually done in both places, the Customer Service admin center app and the channel provider experience.

The following channels are currently available in Omnichannel for Customer Service:

Chat

If you want to help your customers using live chat, you can use the **Chat for Dynamics 365 Customer Service** channel.

To learn more, see Configure a chat channel.

Voice

To address customer issues, you can configure and use the voice channel. More information: Introduction to the voice channel

SMS

If you want to help your customers using SMS, you can use the following SMS channels:

- SMS through Azure Communication Services
- SMS through TeleSign
- SMS through Twilio

Social channels

If you want to help your customers using social media, you can use the following social channels:

- Apple Messages for Business
- Facebook
- Google's Business Messages
- WhatsApp through Twilio
- WeChat
- LINE

Custom messaging channel

If you want to help your customers using social channels that are not supported as standard channels, such as Telegram, you can use the custom channels. To learn more, see Configure custom messaging application.

If you want to help your customers using your line-of-business messaging channels, you can use the Direct Line Bot Framework method.

Microsoft Teams

If you want to help your customers using a standard collaboration channel, you can use the Microsoft Teams channel.

To learn more, see Configure Microsoft Teams.

Entity records

If you want to help your customers using standard entity records such as incident, quote, campaign and so on, you can use Entity records channel.

To learn more, see Entity records channel.

License requirements

An active subscription of Dynamics 365 for Customer Service Digital Messaging is required for SMS, social channels, Microsoft Teams, and custom messaging. In addition to Dynamics 365 subscriptions, if you choose to use any third-party channels you'll need to acquire subscriptions from those providers as well.

You can get Chat for Dynamics 365 Customer Service with either of the following add-on licenses:

- Chat for Dynamics 365 Customer Service
- Digital Messaging

> **Note**
>
> Digital Messaging add-on license includes Chat for Dynamics 365 Customer, SMS, Facebook, and bot integration.

You can get the SMS, social channels, and custom messaging channels with the following add-on license:

- Digital Messaging

You can get the Microsoft Teams channel with the following add-on license:

- Teams license

Overview of SMS channels

Article • 03/17/2023

The SMS channel in Omnichannel for Customer Service allows your organization to connect to customers via text messages. Your customers can send text messages and connect with an appropriate agent. Agents can view incoming SMS requests on their dashboard and respond accordingly. While agents can't send messages, Omnichannel for Customer Service supports outbound messaging via Power Automate flows. More information: Configure outbound messaging

You can use the same phone number for the SMS channel, and for inbound and outbound calling in the voice channel. SMS is currently only available in US, Canada, and Puerto Rico. For detailed information about numbers and eligibility, see Subscription eligibility and number capabilities.

For best SMS delivery experience, we recommend that you submit a toll-free verification application for your toll-free numbers. More information: How do I submit a toll-free verification?

Prerequisite

You must obtain an active subscription of **Dynamics 365 Customer Service Digital Messaging**. For more information about licenses and pricing, see the Dynamics 365 licensing guide. You can also purchase add-ins on the Microsoft 365 admin center. More information: Buy add-ons

Supported SMS channels

In Omnichannel for Customer Service, you can configure the SMS channel as follows:

- Configure SMS channel using Azure Communication Services
- Configure SMS channel for Twilio
- Configure SMS channel for TeleSign

> **Note**
>
> SMS isn't supported with Azure direct routing. More information: **Azure direct routing**

Next steps

Configure an SMS channel using Azure Communication Services
Configure SMS channel for Twilio
Configure SMS channel for TeleSign

See also

Channels in Omnichannel for Customer Service
SMS FAQ
Support for live chat and asynchronous channels

Configure an SMS channel using Azure Communication Services

Article • 06/20/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article discusses how you can configure an SMS channel using Azure Communication Services.

Prerequisites

- Purchase and install the voice channel for Dynamics 365 Customer Service. More information: Provision Omnichannel for Customer Service and Install voice channel
- Connect to Azure Communication Services. More information: Connect to Azure Communication Services

  If you've connected your existing Azure resource, ensure that you've enabled SMS services. More information: Enable call recording and SMS services
- Set up a phone number that's enabled for SMS services. Ensure that you select **Send SMS** or **Send and receive SMS** options when you choose your phone number features in Customer Service admin center or Omnichannel admin center. More information: Acquire new phone numbers

  If you're using an existing phone number that's not enabled for SMS, then you can upgrade your plan. More information: Edit phone numbers

Configure a workstream for the SMS channel

1. Go to the **Workstreams** page, and open the workstream that you created.
2. In the **Set up your SMS channel** section, select **Set up SMS**, and then configure the following options.
   a. On the **SMS setup** page, select a number from the list.
   b. On the **Language** page, select the language that you want to set as the default.

c. On the **Behaviors** page, configure the following options:

- **Channel operation hours:** Set the toggle to **On**, and then select an operating hour record. More information: Configure operating hours
- Configure custom automated messages.
- Configure post-conversation survey.

> ⓘ **Note**
>
> File attachments aren't supported in the SMS channel using Azure Communication Services.

d. Verify the settings on the **Summary** page, and then select **Finish**. The SMS channel is now configured.

3. Configure routing rules.
4. Configure work distribution.
5. Add a bot.
6. In **Advanced settings**, configure the following options based on your business needs.

   - Sessions
   - Agent notifications
   - Context variables
   - Smart assist bots
   - Quick replies

Next steps

Create message templates

See also

Channels in Omnichannel for Customer Service
Overview of SMS channels
Understand and create workstreams
Configure SMS channel for Twilio
Configure SMS channel for TeleSign
Delete a configured channel
SMS FAQ
Support for live chat and asynchronous channels

Configure an SMS channel for TeleSign

Article • 02/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

An SMS channel allows your organization to connect to customers by using text messages. After you configure an SMS channel, your customers can send text messages and connect with a customer service agent. This provides your customers the flexibility to connect with their mobile devices when an internet connection is not available to connect to a chat channel.

Agents can view incoming SMS requests on their dashboard and respond accordingly.

The tasks to add SMS support for TeleSign are as follows:

1. Enable SMS channel in your Dynamics 365 organization.
2. Register with TeleSign and get your customer ID and API key, and purchase a phone number.
3. Add SMS support through Omnichannel for Customer Service.

> **Note**
>
> - The maximum number of characters supported for sent and received messages is 1600.
> - To ensure that third-party SMS providers handle opt-out commands properly, you must configure your consent settings with the provider directly.
> - SMS is an asynchronous mode of communication. Agents can close the conversation and then work on them later. Ending the conversation will mark it as resolved. More information: **Understand conversation states**

Prerequisite

Verify that you have permissions on the secure columns. More information: Configure permissions to access secure columns

Enable SMS channel in your Dynamics 365 organization

You can enable the SMS channel from the Dynamics 365 admin center. For steps on enabling SMS in your organization as a part of provisioning Omnichannel for Customer Service, see Provision Omnichannel for Customer Service.

Sign up for TeleSign account

An SMS channel can be enabled within Omnichannel for Customer Service by integrating with TeleSign. This integration uses public APIs of TeleSign for sending and receiving text messages. You must sign up for a TeleSign account to enable an SMS channel in your organization.

1. Go to TeleSign to sign up for a self-service account, and upgrade to standard or enterprise account for a complete integration with Omnichannel for Customer Service. If you expect to send high volumes of SMS traffic, such as more than 100,000 messages per month, contact TeleSign support to request an invoiced enterprise account.

2. Purchase support phone numbers through your TeleSign account.

3. Get the customer ID and API key from your TeleSign account. You will need to provide these while setting up the SMS channel in Omnichannel for Customer Service.

4. You are provided with a callback URL that must be sent to TeleSign support. This callback URL is specific to your organization and is available when you add SMS support for your organization. When you send an email to TeleSign support, include the callback URL, your customer ID, and enter the subject line as **Omnichannel for Customer Service callback URL update request**.

Add SMS support

1. In Dynamics 365, go to one of the admin apps, and perform the following steps:

Customer Service admin center

a. In the site map, in **Customer support**, select **Channels**.

b. In **Accounts**, for **Messaging accounts**, select **Manage**.

2. On the **Accounts and channels** page, select **New account**.

3. Enter the following details:

   a. In **Channel details**, enter a name, and select SMS in **Channel**.

   b. In **Account details**, select TeleSign in **Provider**, and enter the following details:

      - **Customer ID:** Customer ID generated from the TeleSign account.
      - **API key:** API key generated from the TeleSign account.

   c. In **SMS phone numbers**, select **Add**, and enter the following details in **Add SMS number**:

      - **Number:** Specify the support phone number that you purchased from TeleSign in the <*phone_number*> format, such as 14252306549. Make sure that you don't enter blank spaces, special characters, or the plus sign (+).
      - **Type:** Select Geo, Short code, or Toll free.
      - **Description:** Enter a description.
      - **Validate:** Select to validate the customer ID and API key.

   a. In **Callback URL**, copy the value and send it to TeleSign at support@telesign.com with your customer ID; enter the subject line as "Omnichannel for Customer Service callback URL update request".

4. Open the workstream that you created for the SMS channel for TeleSign.

5. Select **Add SMS Channel**, and configure the following options:

   a. On the **SMS number** page, select a number from the list.

   b. On the **Language** page, select the language that you want to set as the default.

   c. On the **Behaviors** page, configure the following options:

      - **Channel operation hours:** Set the toggle to **On**, and then select an operating hour record. More information: Configure operating hours.
      - Custom automated messages
      - Post-conversation survey

   a. In **User features**, set the toggle for **File attachments** to **On** and select the following options if you want both agents and customers to exchange files.

More information: Enable file attachments.

- Customers can send file attachments
- Agents can send file attachments

a. Verify the settings on the **Summary** page, and select **Finish**. The SMS for TeleSign channel is configured.

6. Configure routing rules. More information: Configure work classification.
7. Configure work distribution. More information: Work distribution settings
8. Add a bot. More information: Configure a bot.
9. In **Advanced settings**, configure the following options based on your business needs:

   - Sessions
   - Agent notifications
   - Context variables)
   - Smart assist bots
   - Quick replies

Flow of data between Omnichannel for Customer Service SMS channel and TeleSign

Incoming text messages

For an incoming text message sent by a customer to the support phone number, the message is first sent to the TeleSign service and then pushed by TeleSign to Omnichannel for Customer Service using the callback URL. After this, the message gets routed and associated to either a new or an existing conversation by Omnichannel for Customer Service.

Outgoing text messages

For an outgoing message sent by an agent from within Dynamics 365, the message is first sent to the TeleSign service and then TeleSign sends it to the customer. In addition to the text message, Omnichannel for Customer Service uses the APIs provided by TeleSign to send the customer's phone number, support phone number (TeleSign SenderID), and the TeleSign account information (CustomerID and the API Key) to the TeleSign service.

TeleSign API Key Validation

When you validate the API key while setting up the SMS channel, a call is made to TeleSign to validate customer ID and the API key.

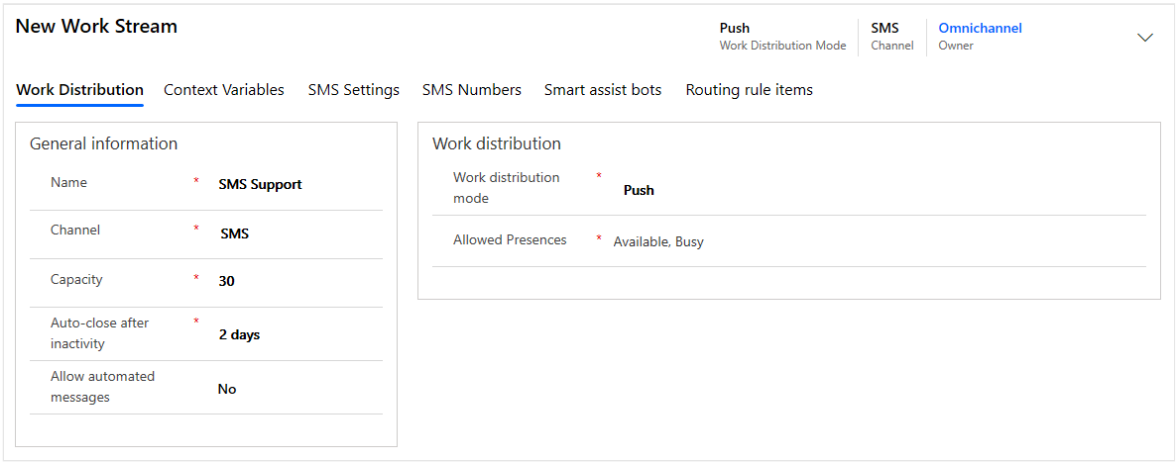
Add SMS support in Omnichannel Administration

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

1. In the Omnichannel Administration app, go to **Work Streams** under **Work Distribution Management**.

2. Select **New** to create a workstream. On the **Work Distribution** tab, enter the following information:

   - **Name**: Name of the workstream.
   - **Channel**: Select **SMS**.
   - **Auto-close after inactivity**: Select a duration of at least 8 hours.
   - **Allow automated messages**: Specify **Yes** to be able to define the business hours.

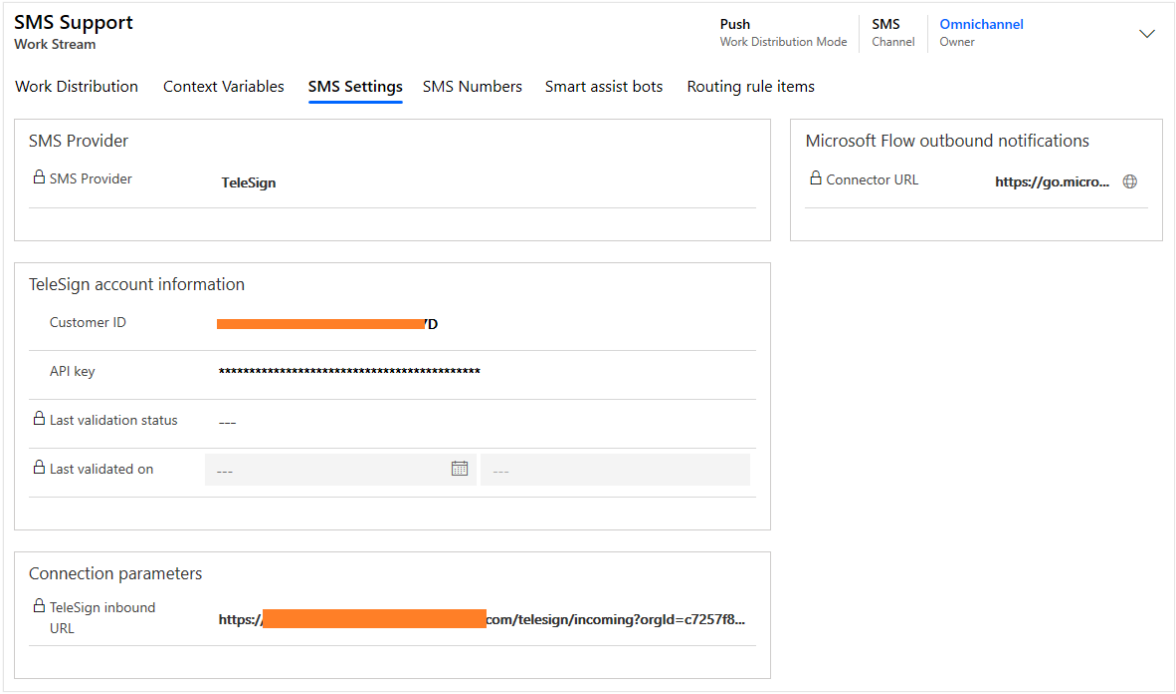


3. On the **SMS Settings** tab, enter the following information:

   - **Customer ID**: Customer ID generated from the TeleSign account.
   - **API key**: API key generated from the TeleSign account.

4. Copy the value from the **TeleSign inbound URL** field, and send it to TeleSign at support@telesign.com with your customer ID; enter the subject line as "Omnichannel for Customer Service callback URL update request". This value is the callback URL that is used to process incoming SMS messages.

5. Select **Save**.



6. On the **SMS Numbers** tab, select **New SMS Number**, and then enter the following details:

   - **Number**: Specify the support phone number that you purchased from TeleSign in the *<country_code><phone_number>* format, such as 14252306549. Make sure that you don't enter blank spaces or special characters.
   - **SMS number language**: This is the preferred language that will be used when you configure automated messages on the **Automated messages** tab.
   - **Type**: Select **Long code**, **Short code**, or **Toll free**.
   - **Description**: Specify a description for the number. (Optional)
   - **Operating Hours**: Specify the business hours when the customer support team is active and available to serve customers.

> ⓘ **Note**
>
> - You can configure only one phone number per workstream.
> - Ensure that the phone number is entered in the following format without spaces and special characters: <phone number>. For information on availability of international numbers, see **TeleSign coverage map**.

- Short code is supported for enterprise accounts.

7. Select **Save**.
8. (Optional). On the **Automated messages** tab, configure automated messages.
9. (Optional). On the **Surveys** tab, configure a post-conversation survey.
10. Select **Validate API Key** from the toolbar at the top of the page to validate the customer ID and API key.
11. Open the workstream you created for SMS.
12. On the **Routing rules items** tab, create a routing rule to transfer the SMS to an appropriate agent. Routing rule for SMS works on the **Mobile Phone** field of the Contact entity. The customer is identified based on the **Mobile Phone** field and the conversation is automatically linked to the contact record.

See also

Channels in Omnichannel for Customer Service
Overview of SMS channels
Configure SMS channel using Azure Communication Services
Configure SMS channel for Twilio
Create and manage routing rules
Configure automated messages
Delete a configured channel
SMS FAQ

Configure an SMS channel for Twilio

Article • 10/25/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The SMS channel through Twilio in Omnichannel for Customer Service allows your organization to connect to customers by using text messages. Your customers can send text messages through Twilio and connect with an appropriate customer service agent. Agents can view incoming SMS requests on their dashboard and respond accordingly.

Prerequisites

Make sure that the following prerequisites are met:

- SMS for Twilio is provisioned in Omnichannel for Customer Service. More information: Provision Omnichannel for Customer Service

  > **Note**
  >
  > To enable the SMS channel for Twilio in an existing Omnichannel for Customer Service environment, you must upgrade to the latest version of Omnichannel for Customer Service. More information: **Upgrade Omnichannel for Customer Service**

- A Twilio account with a phone number and subscription is available.

  > **Note**
  >
  > > For newly created Twilio accounts, you must disable a security setting that blocks the ability to send media files. More information: **Extended notice and update on security changes: HTTP Authentication for Voice and Messaging Media enabled by default**

- Permissions on the secure columns. More information: Configure permissions to access secure columns

Get Twilio account details

An SMS channel is enabled within Omnichannel for Customer Service by integrating with Twilio. This integration uses public APIs of Twilio for sending and receiving text messages.

1. In your Twilio account, note the ACCOUNT SID and AUTH TOKEN values. These values are required to create the SMS configuration in the Omnichannel admin center app.
2. Purchase support phone numbers through your Twilio account.

> **Note**
>
> - Only US phone numbers are supported.
> - To ensure that third-party SMS providers handle opt-out commands properly, you must configure your consent settings with the provider directly.

Set up the SMS channel for Twilio

To configure the SMS channel, complete the following tasks:

- Configure the SMS number
- Configure the workstream for the SMS channel

Configure the SMS number

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, in **Customer support**, select **Channels**.

   b. In **Accounts**, for **Messaging accounts**, select **Manage**.

2. On the **Accounts and channels** page, select **New account**.

3. Enter the following details:
   a. In **Channel details**, enter a name, and select SMS in **Channel**.
   b. In **Account details**, select **Twilio** in **Provider**, and then enter the following details:

      - **Account SID:** Enter the Twilio ACCOUNT SID.
      - **Auth token:** Enter the Twilio AUTH TOKEN.

   c. In **SMS phone numbers**, select **Add**, and enter the following details in **Add SMS number**:

      - **Number:** Specify the support phone number that you purchased from Twilio in the *<country_code><phone_number>* format, such as 14252306549. Make sure that you don't enter blank spaces or special characters.
      - **Type**: Select **Long code**, **Short code**, or **Toll free**.
      - **Description**: Specify a description for the number. (Optional)

   d. In **Callback information**, copy the callback information. The copied information is used for the Twilio account.
   e. Select **Done**. The account is configured.

Configure the workstream for the SMS channel

To configure the workstream, make sure you perform the steps to create a workstream for the SMS channel. More information: Create workstreams

1. Go to workstreams page and open the workstream you created for the channel.
2. In the **Set up your SMS channel** section, select **Set up SMS**, and then configure the following options:
   a. On the **SMS setup** page, select a number from the list.
   b. On the **Language** page, select the language that you want to set as the default.
   c. On the **Behaviors** page, configure the following options:

      - **Channel operation hours:** Set the toggle to **On**, and then select an operating hour record. More information: Configure operating hours
      - Custom automated messages
      - Post-conversation survey

   d. In **User features**, set the toggle for **File attachments** to **On** and select the following options if you want both agents and customers to exchange files. More information: Enable file attachments

- Customers can send file attachments
- Agents can send file attachments

e. Verify the settings on the **Summary** page, and then select **Finish**. The SMS for Twilio channel is configured.

3. Configure routing rules. More information: Configure work classification
4. Configure work distribution. More information: Work distribution settings
5. Add a bot. More information: Configure a bot
6. In **Advanced settings**, configure the following options based on your business needs:

   - Sessions
   - Agent notifications
   - Context variables
   - Smart assist bots
   - Quick replies

Establish a connection between Omnichannel for Customer Service and the Twilio account

Perform the following steps to configure the URL in Twilio for the SMS messages from Omnichannel for Customer Service to be processed in Twilio:

1. Copy the value in **Twilio inbound URL** of the workstream for Twilio.
2. Go to your Twilio account > **Phone Numbers** > **Active Numbers**, and then select the SMS phone number.
3. In the **Messaging** section, paste the Twilio inbound URL.

Flow of data between Omnichannel for Customer Service - SMS channel and Twilio

Incoming text messages

For an incoming text message sent by a customer to the support phone number, the message is first sent to the Twilio messaging service. Then Twilio pushes it to Omnichannel for Customer Service by using the callback URL. The message is then routed and associated to either a new or an existing conversation by Omnichannel for Customer Service.

Outgoing text messages

For an outgoing message sent by an agent from within Dynamics 365, the message is first sent to the Twilio service and then Twilio sends it to the customer. In addition to the text message, Omnichannel for Customer Service uses the APIs provided by Twilio to send the customer's phone number, support phone number, and the Twilio account information (Account SID and the Auth Token) to the Twilio service.

Twilio account and phone number validation

When you validate the SMS settings while setting up the SMS channel, a call is made to Twilio to validate the Account SID and Auth Token.

Configure the SMS for Twilio channel in the Omnichannel Administration app

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022, and the app was removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

The information in this section isn't applicable if you're using the new Omnichannel admin center app in the latest version of Omnichannel for Customer Service.

Perform the following steps to create a work stream for the SMS channel for Twilio:

1. In Omnichannel Administration, go to **Work Streams** under **Work Distribution Management**.
2. Select **New**. The **New Work Stream** page appears.
3. In the **General information** area, enter the following details:
    - **Channel**: Select **SMS**.
    - **Auto-close after inactivity**: Select a value that indicates a duration of eight hours or longer.
    - **Allow automated messages**: Specify **Yes** to be able to define the business hours.

4. In **Work distribution**, specify the necessary details. More information: Create a work stream

5. On the **SMS Settings** tab, enter the following details:

   - **SMS Provider**: Select **Twilio**.
   - **Account SID**: Enter the Twilio ACCOUNT SID.
   - **Auth Token**: Enter the Twilio AUTH TOKEN.

6. Select **Save**. The **Twilio inbound URL** is generated and displayed.

7. On the **SMS Numbers** tab, select **New SMS Number**, and then enter the following details:

   - **Number**: Specify the support phone number that you purchased from Twilio in the <*country_code*><*phone_number*> format, such as 14252306549. Make sure that you don't enter blank spaces or special characters.
   - **SMS number language**: The preferred language that's used when you configure automated messages on the **Automated messages** tab.
   - **Type**: Select **Long code**, **Short code**, or **Toll free**.
   - **Description**: Specify a description for the number. (Optional)
   - **Operating Hours**: Specify the business hours when the customer support team is active and available to serve customers.

   > ⓘ **Note**
   >
   > You can configure only one phone number per workstream.

8. Select **Save**.

9. (Optional). On the **Automated messages** tab, configure automated messages.

10. (Optional). On the **Surveys** tab, configure a post-conversation survey.

11. On the command bar, select **Validate API Key**. The Twilio account and phone number are validated.

12. Configure the routing rules on the **Routing rule items** tab. The routing rule for SMS works on **Mobile Phone** of the **Contact** entity. The customer is identified based on **Mobile Phone**, and the conversation is automatically linked to the contact record.

    > ⓘ **Note**

To configure routing rules and other options in the workstream for Twilio, see the following:

- **Skill-based routing**
- **Productivity tools**
- **Smart assist**
- **Templates**

See also

Channels in Omnichannel for Customer Service
Overview of SMS channels
Delete a configured channel
Configure SMS channel using Azure Communication Services Configure SMS channel using TeleSign SMS FAQ

Configure an Apple Messages for Business channel

Article • 10/27/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Many customers use the Apple Messages app for their daily communication needs. The Apple Messages app also supports Messages for Business, a new way to apply iMessage's richer communication capabilities to engage with businesses. The asynchronous nature of this channel gives customers the convenience of resolving their issues when they find time, in contrast to real-time channels such as Chat for Dynamics 365, where the session ends when the chat window is closed.

Apple Messages for Business supports rich messaging experiences, allowing customer and agents to converse through convenient and engaging interactions. More information: Introduction to Messages for Business - Apple Developer

Prerequisites

Before you configure the Apple Messages for Business channel in Dynamics 365 Omnichannel for Customer Service, ensure that the following prerequisites are met:

1. Register your business with Apple Business Register More information: Apple Business Register
2. Enable Messages for Business and create a Messages for Business account for your brand. More information: Apple Messages for Business Accounts Introduction
3. Configure the Messaging Service Provider (MSP) using the correct URL provided for your geo-region in the following table.

Geo location	API Endpoint URL
Asia-Pacific	`https://dynamics365-omnichannel-apac.omnichannelengagementhub.com/applemessagesforbusiness`

Geo location	API Endpoint URL
Australia	`https://dynamics365-omnichannel-aus.omnichannelengagementhub.com/applemessagesforbusiness`
Canada	`https://dynamics365-omnichannel-can.omnichannelengagementhub.com/applemessagesforbusiness`
Europe	`https://dynamics365-omnichannel-eur.omnichannelengagementhub.com/applemessagesforbusiness`
France	`https://dynamics365-omnichannel-fra.omnichannelengagementhub.com/applemessagesforbusiness`
Germany	`https://dynamics365-omnichannel-ger.omnichannelengagementhub.com/applemessagesforbusiness`
India	`https://dynamics365-omnichannel-ind.omnichannelengagementhub.com/applemessagesforbusiness`
Japan	`https://dynamics365-omnichannel-jpn.omnichannelengagementhub.com/applemessagesforbusiness`
North America	`https://dynamics365-omnichannel-nam.omnichannelengagementhub.com/applemessagesforbusiness`
South America	`https://dynamics365-omnichannel-sam.omnichannelengagementhub.com/applemessagesforbusiness`
Switzerland	`https://dynamics365-omnichannel-che.omnichannelengagementhub.com/applemessagesforbusiness`
United Arab Emirates	`https://dynamics365-omnichannel-uae.omnichannelengagementhub.com/applemessagesforbusiness`
United Kingdom	`https://dynamics365-omnichannel-uk.omnichannelengagementhub.com/applemessagesforbusiness`

Configure an Apple Messages for Business channel instance in Omnichannel admin center

To add the Apple Messages for Business channel instance, complete the following steps:

1. In the Omnichannel site map, select **Channels** under **General settings**, and then on the **Accounts and channels** page, select **Add account**.

2. On the **Channel details** page, enter a name and select **Apple Messages for Business** in **Channels**.

3. On the **Add account** page, specify the Apple Messages for Business account ID. To get the account ID, go to your organization's Apple Business Register, open the Messages for Business account, navigate to the Messaging Service Provider configuration and select **Test your Messaging Service Provider connection**, and copy the account ID by selecting **Copy ID**.

   > ⓘ **Note**
   >
   > If your organization uses Customer-managed keys, be aware that Apple Messages for Business acount IDs cannot be encryped. Apple Messages for Business account IDs are part of the URLs used by customer devices to start new conversations and may be visible to users, but this doesn't present a security concern.

4. To configure routing and work distribution, you can create a workstream or select an existing one.

5. Select the workstream that you've created for the Apple Messages for Business channel and on the workstream page, select **Set up Apple Messages for Business**, and do the following steps:

   a. In the **Available Apple Messages for Business accounts** area, select an account from the list.

   b. On the **Language** page, select the language to use.

   c. On the **Behaviors** page, configure the following options:

      - **Custom automated messages**
      - **Post-conversation survey**
      - **Authentication settings:** If you enable authentication, your agents will be able to request customer's authenticate their identity. You must associate a channel specific authentication setting. This step may be completed later, after channel setup. There are two flows to choose from: OAuth 2.0 code flow or OAuth 2.0 OpenID connect flow. More information: Authentication settings for Apple Messages for Business.

   d. On the **User features** page, configure the following options:

- **File attachments:** When set to yes for both customer and agent, customers and agents can send and receive file attachments. More information: Enable file attachments.
- **Apple Pay:** If you enable Apple Pay, your agents will be able to send Apple Pay requests to customers. Each channel instance must have a Payment Profile associated. This step may be completed later, after channel setup. More information: Payment Profiles.

e. Review the **Summary** page, and then select **Create**. The channel instance is configured.

6. Configure routing rules. More information: Configure work classification
7. Configure work distribution. More information: Work distribution settings
8. Optionally, you can add a bot. Skip this step if your conversations are handled by human agents only. More information: Configure a bot
9. In **Advanced settings**, configure the following options based on your business needs:

   - Sessions
   - Agent notifications
   - Context variables
   - Smart assist bots
   - Quick replies
   - Rich messages

Watch this video to learn how to set up the Apple Messages for Business channel in Dynamics 365 Customer Service: https://www.microsoft.com/en-us/videoplayer/embed/RW1djXE?postJsllMsg=true

Configure authentication settings

Perform the steps in Create Apple Messages for Business authentication settings to configure authentication settings.

Configure payment profiles for Apple Pay

Perform the steps in Configure payment profiles to configure the profile.

Create rich messages

Perform the steps in Create rich messages to create rich messages

Use rich messages in conversation control

Perform the steps in Rich messages in the conversation control to use the rich messages.

Watch this video to learn how to view a conversation on the Apple Messages for Business channel in Dynamics 365 Customer Service: https://www.microsoft.com/en-us/videoplayer/embed/RW1dmCE?postJsllMsg=true

See also

Understand and create workstreams
Create and manage routing rules
Configure automated messages
Configure a post-conversation survey
Skill-based routing
Create message templates
Templates
Delete a configured channel
Support for live chat and asynchronous channels

Configure Facebook channel

Article • 03/08/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Many customers use social messaging channels like LINE for their personal communication needs. Many also prefer using these messaging channels to engage with businesses. The asynchronous nature of these channels gives customers the convenience of getting their issues resolved as and when they find time, unlike real-time channels like Chat for Dynamics 365 Customer Service, where the session ends when the chat window is closed.

> **Note**
>
> If you use access tokens in Facebook, refresh them on a 60-day schedule or as required because the tokens might randomly expire. More information: **Facebook access tokens**

Prerequisites

The following prerequisites must be met before you configure the Facebook channel in Omnichannel for Customer Service.

- Create a Facebook page and enable Messenger. More information: Create and Manage a Page and Messaging
- Create a Facebook application. More information: App Development
- Add Messenger and Webhooks to the Facebook application. More information: Setting Up Your Facebook App
- If you'll use a test environment, set up test accounts in Facebook so that agents can send and receive messages in Omnichannel for Customer Service.
- Values for application ID and application secret from the **App ID** and **App Secret** fields in the Facebook application > **Settings** > **Basic**.

Roles and permissions

The following Facebook roles and permissions are required for integrating your Facebook app with Omnichannel for Customer Service.

- Facebook users who don't have a role in the Facebook app must have the `pages_messaging` permission to send messages to a Facebook page from Omnichannel for Customer Service. The app owner must provide the `pages_messaging` permission for users to be able to send messages. More information: pages_messaging
- If the Facebook app that you're using is currently in development mode, then only those Facebook users who have roles within the app can send messages to the Facebook page; the messages can be received by or forwarded to Omnichannel for Customer Service. More information: App roles
- For Omnichannel for Customer Service to be able to retrieve the customer's username from Facebook, the customer must request for Business Asset User Profile Access in their Facebook app. More information: Business Asset User Profile Access

Configure a Facebook channel

To configure a Facebook channel, the following steps are required:

1. Create a Facebook channel account.
2. Configure a Facebook workstream and work distribution settings

Create the Facebook channel account

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, in **Customer support**, select **Channels**.

   b. In **Accounts**, for **Messaging accounts**, select **Manage**.

2. On the **Accounts and channels** page, select **New account**.
3. Enter the following details:

   a. On the **Channel details** page, enter a name and select Facebook in **Channels**.

b. On the **Add account** page, in the **Application ID** and **Application secret** fields, specify the Facebook App ID and App secret that you'd copied from the Facebook application.

c. On **Add Facebook Pages to this account**, do the following steps:

d. Select **Add**, and in the **Add Facebook Page** pane, enter the following details:

- **Page name:** Name of the Facebook page.
- **Page ID:** ID of the Facebook page. To get the page ID, go to your Facebook page, select About, and copy the value in the Page ID field.
- **Page access token:** Specify the Page access token of the Facebook application. To get the page access token, go to your Facebook application and then go to **Messenger** > **Settings**. In the **Access Tokens** section, select the page, and copy the value in the **Page Access Token** field.

e. On the **Callback information** page, the **Callback URL** and **Verify token** fields are populated automatically when you save the settings. Use the information to configure webhooks in the Facebook application. The values for the fields will not be generated if the Facebook page is reused across multiple instances of the channel.

Create a Facebook workstream

1. To configure routing and work distribution, perform the steps outlined in create a workstream.

2. Select the workstream that you've created for the Facebook channel and on the workstream page, select **Set up Facebook**, and do the following steps:

a. In the **Available Facebook Pages** area, select a page from the list.

b. On the **Language** page, select the language to use.

c. On the **Behaviors** page, configure the following options:

- Custom automated messages
- Post-conversation survey

d. On the **User features** page, configure the following options:

- **File attachments:** When set to yes for both customer and agent, customers and agents can send and receive file attachments. More information: Enable file attachments. The availability and support of media

is dependent on the Facebook application settings. More information: Facebook updates

- **Facebook message tag:** Set to **Yes** to enable your agents to message customers after 24 hours have passed. When set to **No**, agents will be unable to respond to customers after 24 hours unless the customer sends another message.

If you enable the Facebook human agent message tag during an active conversation between the agent and customer, the agent must close the conversation and reopen it to communicate with customers after 24 hours of inactivity. Agents can start conversations with customers for up to seven days.

To use the Facebook human agent message tag, you must also turn it on in the Facebook app. For more information, see Facebook Developer Tools.

e. Review the **Summary** page, and select **Create**. The channel instance is configured.

3. Configure routing rules. More information: Configure work classification
4. Configure work distribution. More information: Work distribution settings
5. Optionally, you can add a bot; skip this step if your conversations are handled by human agents only. More information: Configure a bot
6. In **Advanced settings**, configure the following options based on your business needs:

   - Sessions
   - Agent notifications
   - Context variables
   - Smart assist bots
   - Quick replies

Customer experience

A customer can start a conversation in any of the following ways:

- Messenger on the Facebook page
- www.messenger.com
- Messenger app on a mobile device
- Messenger widget on a custom website

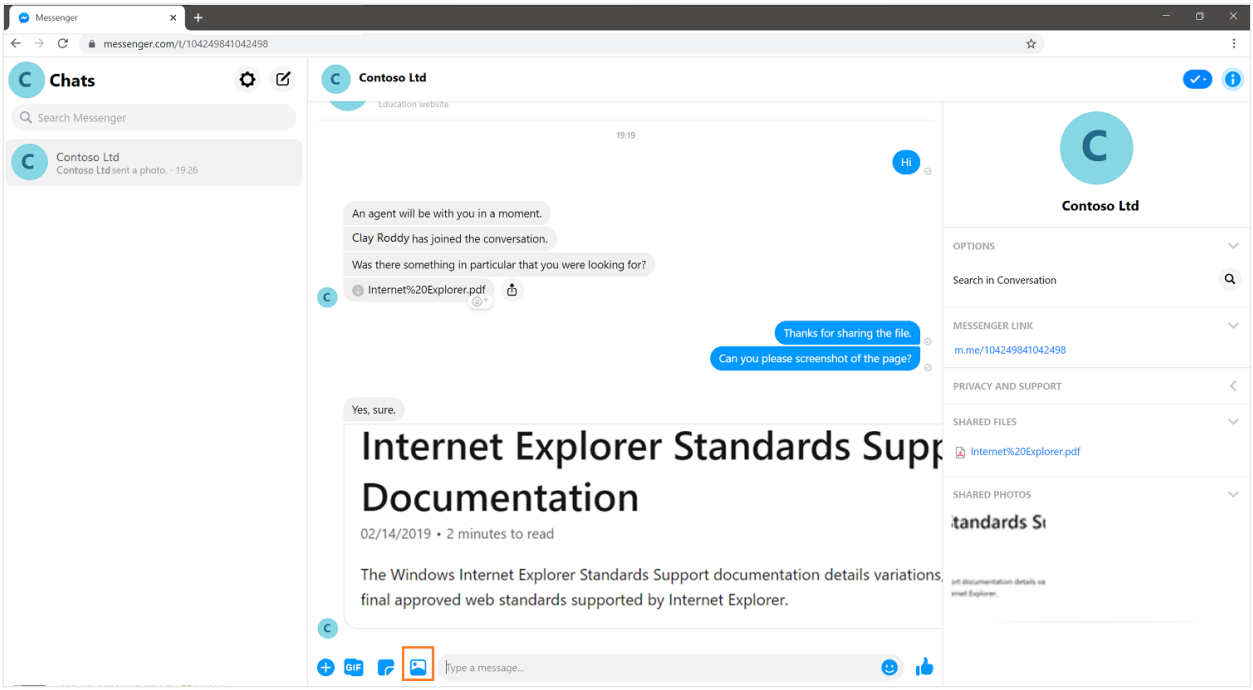
If a customer starts a conversation from the Facebook page and then later switches to the mobile device, the previous conversation persists, and the customer can continue the conversation.

The agent receives the notification of the incoming conversation request. More information: Use Facebook channel

After the Facebook social profile is linked to a customer or contact record by the agent, subsequent Facebook conversations are linked to the customer records and the customer summary is populated.

If the customer is not identified based on name, a new contact record can be created.

The customer can send attachments only if you enable them. When the option isn't enabled for the customers, they can still attempt to send the file. However, agents won't receive the file and will see an error.



Privacy notice

By enabling this feature, your data will be shared with Facebook and flow outside of your organization's compliance and geo boundaries (even if your organization is in a Government Cloud Community region). Consult the feature technical documentation for more information here.

Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, such as laws relating to monitoring, recording, and storing communications with their end users. This includes adequately notifying end users that their communications with agents may be

monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

Configure a Facebook channel in Omnichannel Administration

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

After completing the prerequisites, you can add the Facebook channel for your organization by following these steps:

1. Create a Facebook workstream
2. Create a Facebook channel
3. Create routing rules
4. Modify settings for a specific Facebook page

Create a Facebook workstream

1. Sign in to Omnichannel Administration.
2. Go to **Work Distribution Management** > **Work Streams**.
3. Select **New** to create a Facebook workstream.
4. On the **Work Distribution** tab, in the **Channel** field, select **Facebook**.
5. Specify other details as required. To learn more, see Understand and create workstreams.
6. Select **Save**.

Create a Facebook channel

1. Go to **Channels** > **Facebook**.

2. Select **New** to create a Facebook channel.

3. On the **New Facebook Application** page, provide the following information:

    - **Name**: Name of the Facebook application.
    - **Application Id**: ID of the Facebook application. To get the application ID, go to your Facebook application, select **Settings** > **Basic**, and copy the value in the **App ID** field.
    - **Application Secret**: Application secret of the Facebook application. To get the application secret, go to your Facebook application, select **Settings** > **Basic**, and copy the value in the **App Secret** field.

4. Select **Save**. After you save the record, the **Facebook Pages** section is enabled, and it allows you to add the Facebook pages through which a customer can connect to an agent.

    > **Note**
    >
    > In this release, you can create only one Facebook application per organization. However, you can add multiple pages in a Facebook application.

5. In the **Facebook Pages** section, select **Add New Facebook Page** to add a Facebook page.

6. On the **New Facebook Page** page, **Account setup** tab, provide the following information:

    - **Page Id**: ID of the Facebook page. To get the page ID, go to your Facebook page, select **About**, and copy the value in the **Page ID** field.
    - **Page Name**: Name of the Facebook page.
    - **Page Access Token**: Page access token from the Facebook application. To get the page access token, go to your Facebook application and then go to **Messenger** > **Settings**. In the **Access Tokens** section, select the page, and copy the value in the **Page Access Token** field.
    - **Facebook Application**: The Facebook application record is auto filled from which you added a Facebook page.
    - **Work Stream**: Browse and select the workstream you created for the Facebook channel.

7. Select **Save** to create the record.

After you add a Facebook page, values for **Callback Uri** and **Verify Token** are generated automatically. These values are used to configure webhooks in the Facebook application.

> ⓘ **Note**
>
> You can add multiple Facebook **Page Id** (pages) to a **Facebook Application** channel. However, a Facebook **Page Id** can be linked to one **Facebook Application** only. If you link the same Facebook **Page Id** to multiple **Facebook Application** channels, then **Callback Uri** and **Verify Token** won't be generated automatically.

Create routing rules

1. Go to **Work Distribution Management** > **Work Streams**.
2. Open the workstream you created in Step 1.
3. On the **Routing rules items** tab, create a routing rule to transfer the message to an appropriate agent. Select the entity as **Facebook Engagement Context**.

   For example, you can create a rule to transfer Facebook chat from a customer named Lesa to the default queue.

When you create conditions for routing rules, the **Facebook Engagement Context (Conversation)** entity enables you to set the following attributes:

- **Customer name**: The customer name is shown in the format "first name, last name".
- **Locale**: For a list of locales, see Facebook developer documentation.
- **Timezone**: Timezone is shown as a number relative to GMT, for example, “5.5”.
- **User Page Scoped Id**: This is shown as a number string.

Modify settings for a specific Facebook page

1. In the Omnichannel Administration app, go to your Facebook application and select the Facebook page you want to modify.
2. On the **General settings** tab, provide the following information:

   - **Language**: Select the preferred language for your Facebook page.

- **Work stream**: Select an existing workstream or create a new one.
- **Enable file attachments for customers**: Set to **Yes** to allow customers to send file attachments to agents. Otherwise, set to **No**.
- **Enable file attachments for agents**: Set to **Yes** to allow agents to send file attachments to customers. Otherwise, set to **No**.

> **Note**
>
> - To learn more about attachments, see **Enable file attachments**.
> - To learn about uploading media in Facebook, see the Facebook developer documentation. The availability and support of media is dependent on the Facebook application settings. More information: **Facebook updates**

- **Turn on your Facebook human agent message tag**: Set to **Yes** to enable your agents to message customers after 24 hours have passed. When set to **No**, agents will be unable to respond to customers after 24 hours unless the customer sends another message.

  If you enable the Facebook human agent message tag during an active conversation between the agent and customer, the agent must close the conversation and reopen it in order to communicate with customers after 24 hours of inactivity. Agents can start conversations with customers for up to seven days.

  To use the Facebook human agent message tag, you must also turn it on in the Facebook app. For more information, see Facebook Developer Tools.

3. On the **Automated messages** tab, configure automated messages.
4. On the **Surveys** tab, configure a post-conversation survey.

See also

Understand and create workstreams
Create and manage routing rules
Configure automated messages
Configure a pre-chat survey
Configure a post-conversation survey

Delete a configured channel
Support for live chat and asynchronous channels

Configure Google's Business Messages channel

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Many customers use social messaging channels like Google's Business Messages for their personal communication needs. Many also prefer using these messaging channels to engage with businesses. The asynchronous nature of these channels gives customers the convenience of getting their issues resolved as and when they find time, unlike real-time channels like Chat for Dynamics 365, where the session ends when the chat window is closed.

Google's Business Messages channel gives you the opportunity to capitalize on the social media trend and engage with your customers in a seamless and personalized experience.

Prerequisites

Complete the following steps before configuring Google's Business Messages channel in Omnichannel for Customer Service.

- In Customer Service, provision the channels in your environment. More information: Provision Omnichannel for Customer Service
- In Google's Business Messages, complete the following actions:
  - Register as a partner
  - Create a service account with a service account key
  - Configure the agent:
    - Create an agent
    - Set non-local information
    - Set messaging availability
    - Set agent- and location-level settings

    - Set the default locale
    - Verify the agent
- Verify that you have permissions on the secure columns. More information: Configure permissions to access secure columns

Create a Google's Business Messages channel

1. Go to one of the admin apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

   b. Select **Manage** for **Messaging accounts**. The **Accounts and channels** page appears.

   c. Select **New account**.

2. In the **Name** field, enter the name for the account.

3. In the **Channel** dropdown menu, select **Google's Business Messages**, and then select **Next**.

4. On the **Google's Business Messages Partner account** page, in the **Partner ID** field, copy and paste the Partner ID from the **Settings** page of the Google's Business Messages app.

5. In the **Client token** field, enter the token from Google's Business Messages app. To retrieve the token, in Google's Business Messages app, on the **Settings** page, under **Webhook**, select the **Configure** link. The **Configure your webhook** page is displayed, and then you can copy the token from the **Client token** field.

6. In Omnichannel admin center, on the **Google's Business Messages Partner account** page, next to **Service Account Credentials file (JSON file)**, select **Upload**, and then select the file you downloaded from Google's Business Messages.

   ⓘ Note

> Only users with proper security permissions can use secured fields, such as **Client token** and **Security Credential**. More information: **Set up security permissions for a field**

7. In Omnichannel, in **Configure your two-way connection with Omnichannel for Customer Service**, copy the **Google's Business Messages** URL and then, in the Business Messages app, on the **Configure your webhook** page, paste the URL in the **Webhook endpoint URL** field.
8. Select **Verify** in the Google's Business Messages app.
9. When the verification has completed, select **Save**.
10. In Google's Business Messages, select the tile for the agent profile you created, and then on the **Overview** page, select and copy the **Brand ID**, and then paste it into the **Brand ID** field in Omnichannel.
11. In Google's Business Messages, select and copy the **Agent ID**, and then paste it into the **Agent ID** field in Omnichannel.
12. In Omnichannel, select **Add** > **Save**.

Create a workstream

1. Go to one of the admin apps, and perform the following steps:

   Customer Service admin center

   - In the site map, select **Workstreams** in **Customer support**. The **All Workstreams** page appears.

2. Select **New workstream**, and then enter a name.
3. In **Type**, select **Messaging**.
4. In the **Channel** dropdown list, select **Google's Business Messages**.
5. In the **Choose existing** dropdown list, select an existing queue to use as the fallback for the workstream.
6. Select **Create**.

7. When the workstream has been created, on the workstream page, select **Set up Google's Business Messages**.
8. Select the agent account you prefer from the list, and then select **Next**.
9. On the **Language** page, select the preferred language, and then select **Next**.
10. On the **User features** page, toggle the **File attachments** setting to **On**, and then select **Next**.
11. Select **Create channel**.

Test the messaging for the agent in the Google's Business Messages app

In the Business Messages app, on the **Overview** page, under **Agent test URLs**, select either **Android** or **iOS**, and then select **Test**.

Create routing rules

Configure routing rules for the workstream you created. Select the entity as Google's Business Messages context.

For example, you can create a rule to transfer Google's Business Messages chat from a customer named Google's Business Messages to the default queue.

Privacy notice

By enabling this feature, your data will be shared with Google and flow outside of your organization's compliance and geo boundaries (even if your organization is in a Government Cloud Community region). Consult the feature technical documentation for more information here.

Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, such as laws relating to monitoring, recording, and storing communications with their end users. This includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

See also

Channels in Omnichannel for Customer Service
Use Google's Business Messages in Omnichannel
Delete a configured channel
Support for live chat and asynchronous channels

Configure a LINE channel

Article • 08/30/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Many customers use social messaging channels like LINE for their personal communication needs. Many also prefer using these messaging channels to engage with businesses. The asynchronous nature of these channels gives customers the convenience of getting their issues resolved as and when they find time, unlike real-time channels like Chat for Dynamics 365 Customer Service, where the session ends when the chat window is closed.

The LINE channel gives you an incredible opportunity to capitalize on the social media trend and engage with your customers in a seamless and personalized experience.

> **Note**
>
> The LINE channel isn't available in the Government Community Cloud (GCC) region.

Prerequisites

Following are the prerequisites before configuring the LINE channel in Omnichannel for Customer Service.

> **Note**
>
> To enable the LINE channel in an existing Omnichannel for Customer Service environment, you must **upgrade to the latest version of Omnichannel for Customer Service**.

1. Create a LINE handle. More information: Create and Manage a LINE profile
2. Create a LINE channel in the LINE Developers console. More information: Create a LINE channel

After completing the prerequisites, you can add the LINE channel for your organization by following these steps:

1. Create a LINE channel.
2. Create routing rules.

Create a LINE channel

To configure the LINE channel

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

   b. Select **Manage** for **Messaging accounts**. The **Accounts and channels** page appears.

   c. Select **New account**.

2. Enter the following details:

   a. On the **Channel details** page, enter a name and select **LINE** in **Channel**.

   b. On the **Account details** page, enter the following details:

   - **Channel ID:** ID of the LINE application. Go to the LINE developer portal > **Provider** > **Channel** (ensure that it's a Messaging API) > **Basic settings**, and then copy the value in the **Channel ID** box.
   - **Channel secret:** Application secret of the LINE application. Go to the LINE developer portal > **Provider** > **Channel** (ensure that it's a Messaging API) > **Basic settings**, and then copy the value in the **Channel secret** box.
   - **Channel access token:** Token of the LINE application. Go to the LINE developer portal > **Provider** > **Channel** (ensure that it's a Messaging API) > **Messaging API**, and then copy the value in the **Channel access token (long-lived)** box.

   c. On the **Callback information** page, copy the text in the **Callback URL** box. You'll use the copied information in the LINE account.

   d. Select **Done**.

3. To configure routing and work distribution, you can create a workstream or select an existing one.

4. Select the workstream that you've created for the LINE channel and on the workstream page, select **Set up LINE**, and configure the following options:

   a. On the **LINE** page, select an account from **Available LINE accounts**.

   b. On the **Language** page, select a language.

   c. On the **Behaviors** page, configure the following options:

      - Custom automated messages
      - Post-conversation survey

   d. On the **User features** page, set the toggle for **File attachments** to **On** and select the following checkboxes if you want to allow agents and customers to send and receive file attachments. More information: Enable file attachments.

      - Customers can send file attachments
      - Agents can send file attachments

   e. Verify the settings on the **Summary** page, and select **Finish**. The LINE channel instance is configured.

5. Configure routing rules. More information: Configure work classification

6. Configure work distribution. More information: Work distribution settings

7. Add a bot. More information Configure a bot

8. In **Advanced settings**, configure the following options based on your business needs:

   - Sessions
   - Agent notifications
   - Context variables
   - Smart assist bots
   - Quick replies

Create a LINE channel in Omnichannel Administration

> **Important**

Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

1. Go to **Channels** > **LINE**.
2. Select **New** to create a LINE channel.
3. On the **New LINE Application** page, provide the following account details:
    - **Name**: Name of the LINE application.
    - **Channel ID**: ID of the LINE application. Go to the LINE developer portal > **Provider** > **Channel** (ensure that it's a Messaging API) > **Basic settings**, and then copy the value in the **Channel ID** field.
    - **Channel secret**: Application secret of the LINE application. Go to the LINE developer portal > **Provider** > **Channel** (ensure that it's a Messaging API) > **Basic settings**, and then copy the value in the **Channel secret** field.
    - **Channel access token**: Token of the LINE application. Go to the LINE developer portal > **Provider** > **Channel** (ensure that it's a Messaging API) > **Messaging API**, and then copy the value in the **Channel access token (long-lived)** field.
    - **Enable Webhooks**: Webhooks in the LINE application must be enabled. Go to the LINE account manager > **Settings** > **Response settings**. Under **Main settings**, select **Bot** for **Response mode**, and then under **Detailed Settings**, select **Enabled** for **Webhooks**.
4. Browse to and select the out-of-the-box work stream for the LINE channel, and then select **Save**. After you save the record, the **LINE** channel is enabled. The Callback URL has been created. The next step is to save it.

    To create a work stream, see Create work streams.
5. The Callback URL might take a few minutes to generate. Select **Refresh**.
6. Go to the the LINE developer portal > **Provider** > **Channel** (make sure it's a Messaging API) > **Messaging API**. Copy the **Webhook URL** from Omnichannel for Customer Service, and then paste it into the **Webhook URL** field in the LINE developer console.
7. Make sure that **Use webhook** is enabled in the LINE app dashboard.

> More information about the LINE app: Setting up your LINE app

8. On the **Automated messages** tab, configure automated messages.
9. On the **Surveys** tab, configure a post-conversation survey.

The LINE channel setup is complete.

> **Note**
>
> You can only add one **LINE account** per **LINE Application** channel.

Modify settings for a specific LINE account

1. In the Omnichannel Administration app, go to your LINE application and select the LINE account you want to modify.
2. On the **General settings** tab, provide the following information:
   - **Language**: Select the preferred language for your LINE account.
   - **Work stream**: Select an existing work stream or create a new one.
   - **Enable file attachments for customers**: Set to **Yes** to allow customers to send file attachments to agents. Otherwise, set to **No**.
   - **Enable file attachments for agents**: Set to **Yes** to allow agents to send file attachments to customers. When the agent sends an attachment, the app sends the blob storage URL to the channel. Otherwise, set to **No**.

     To learn more about attachments, see Enable file attachments.

     To learn more about uploading media in LINE, see LINE developer documentation.
3. On the **Automated messages** tab, configure automated messages.
4. On the **Surveys** tab, configure a post-conversation survey.

Create routing rules

1. Go to **Work Distribution Management** > **Work Streams**.
2. Open the out-of-the-box work stream or the one you created.

3. On the **Routing rules items** tab, create a routing rule to transfer the message to an appropriate agent. Select the entity as **LINE Engagement Context**. For example, you can create a rule to transfer LINE chat from a customer named LINE to the default queue.

Customer and agent experiences

A customer can initiate a conversation in any of the following ways:

- LINE app on a mobile device
- LINE app on a desktop device
- line.me/en/

If a customer initiates a conversation from the LINE website and then later switches to the mobile device, the previous conversation persists and the customer can continue the conversation.

The agent receives the notification of the incoming chat request, along with customer details. More information: View notifications

Once the LINE social profile is linked to an user customer/contact record by the agent, subsequent LINE conversations are linked to the customer records and the customer summary is populated.

If the customer isn't identified by name, a new contact record can be created.

Privacy notice

By enabling this feature, your data will be shared with LINE and flow outside of your organization's compliance and geo boundaries (even if your organization is in a Government Cloud environment). Please consult the feature technical documentation for more information here.

Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, such as laws relating to monitoring, recording, and storing communications with their end-users. This includes adequately notifying end-users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end-users may be monitored, recorded, or stored.

See also

Understand and create workstreams
Configure automated messages
Configure a post-conversation survey
Create and manage routing rules
Delete a configured channel
Support for live chat and asynchronous channels

Configure a WhatsApp channel through Twilio

Article • 10/09/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The WhatsApp channel feature lets you integrate WhatsApp through Twilio with Omnichannel for Customer Service to engage with customers who prefer to use the WhatsApp channel.

The success of social media customer service, like all other customer service, depends on the quality of care provided. Communications from agents should be timely, accurate, sensitive, brief, and friendly, which ultimately improves the customer satisfaction and brand loyalty.

Prerequisites

- Make sure channels are provisioned in your environment. More information: Provision Omnichannel for Customer Service

  > **Note**
  >
  > To enable the Twilio channel in an existing environment, you must upgrade to the latest version of Omnichannel for Customer Service. For information, **Upgrade Omnichannel for Customer Service**.
  >
  > For newly created Twilio accounts, you must disable a security setting that blocks the ability to send media files. More information: **Extended notice and update on security changes: HTTP Authentication for Voice and Messaging Media enabled by default**

- Obtain a Twilio account with an appropriate subscription or a Twilio sandbox account. For information on configuring a Twilio sandbox account, see Integrate a Twilio sandbox account with Omnichannel for Customer Service

- Connect Twilio Number to your WhatsApp Business Profile. To learn more, see Connect your Twilio Number to your WhatsApp Business Profile.
- Verify that you have permissions on the secure columns. More information: Configure permissions to access secure columns

WhatsApp message types and 24-hour session rule

- **Template messages:** Are the outbound messages that agents send through Twilio using one of the preapproved templates? They're typically transactional messages, such as delivery alerts and appointment reminders, sent to users who have opted in to receive messages from your organization. For messages requiring localization, you must get the message approved by WhatsApp in each language. For more information about WhatsApp message templates, see WhatsApp documentation.
- **Session messages:** According to WhatsApp, session messages are incoming messages from a customer or outgoing replies by an agent to the incoming messages, within 24 hours. A messaging session starts when agents receive a message from a customer. It lasts for 24 hours from the most recently received message. Session messages don't need to follow a template, and can include media attachments.
- **24 hours session rule:** A messaging session starts when an agent receives a message from a customer or replies to the incoming message from the customer. When the customer sends a message, the agent has 24 hours to reply from the time the agent received it. However, after 24 hours, the agent can send a message to customer only by using a predefined and approved template.

End-to-end walkthrough

1. Fetch Twilio account details
2. Create a WhatsApp channel
3. Create routing rules
4. Modify settings for a specific WhatsApp phone number

Fetch Twilio account details

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

To integrate a WhatsApp channel through Twilio with Omnichannel for Customer Service, you need to go to your Twilio account and fetch the **ACCOUNT SID** and **AUTH TOKEN** values. Save the values safely because they're required to create a WhatsApp channel configuration in the Omnichannel Administration app.

Go to your **Twilio Console Dashboard** > **Settings** > **General** to fetch the details.

Create a WhatsApp channel

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Channels** in **Customer support**. The **Channels** page appears.

   b. Select **Manage** for **Messaging accounts**. The **Accounts and channels** page appears.

   c. Select **New account**.

2. Enter the following details:

   a. On the **Channel details** page, enter a name and select **WhatsApp** in **Channels**.

   b. On the **Account details** page, enter the following details:

   - **Account SID:** Specify the value from your Twilio account.
   - **Authentication token:** Specify the value from your Twilio account.

   c. On the **WhatsApp numbers** page, select **Add**, and on the page that appears, enter the following information:

   - **Name:** Specify a name.

- **Number:** Specify the WhatsApp phone number by prefixing the plus (+) symbol.

d. On the **Callback information** page, copy the value in the **Twilio inbound URL** box to use for the Twilio account.

e. Select **Done**. The account is added to the list.

3. To configure routing and work distribution, you can create a workstream or select an existing one.

4. Select the workstream that you've created for the WhatsApp channel and on the workstream page, select **Set up WhatsApp** to configure the following options:

a. On the **WhatsApp number** page, in the **Available WhatsApp numbers** list, select the number that you created.

b. On the **Language** page, select the language.

c. On the **Behaviors** page, configure the following options:

- Custom automated messages
- WhatsApp message templates
- Post-conversation survey

d. On the **User features** page, set the toggle for **File attachments** to **On** and select the following checkboxes if you want to allow agents and customers to send and receive file attachments. More information: Enable file attachments.

- Customers can send file attachments
- Agents can send file attachments

e. Verify the settings on the **Summary** page, and select **Finish**. The WhatsApp channel instance is configured.

5. Configure routing rules. More information: Configure work classification.

6. Configure work distribution. More information: Work distribution settings

7. Add a bot. More information Configure a bot.

8. In **Advanced settings**, configure the following options based on your business needs:

- Sessions
- Agent notifications

- Context variables)
- Smart assist bots
- Quick replies

Configure WhatsApp message templates

You can configure the option for agents to send WhatsApp-approved messages. If 24 hours pass after a customer's last message, agents will only be able to send messages from WhatsApp-approved templates until the customer responds. You must create your message templates in your Twilio account and have them approved by WhatsApp before you add them in Omnichannel for Customer Service.

Perform the following steps:

1. For the selected workstream for WhatsApp, edit the WhatsApp account.
2. On the **Behaviors** tab, in **WhatsApp message templates**, select **Add**.
3. On the **Add message template** dialog box, do the following:

    - **Name:** Specify a name for the template.
    - **Default language:** Select the language from the list.
    - **WhatsApp approved text:** Copy and paste the approved text from the template that you created in WhatsApp.

4. Select **Save**.
5. Create as many templates as required.

Integrate a Twilio sandbox account with Omnichannel for Customer Service

1. In Twilio, go to the **Programmable SMS** > **Programmable Messaging** > **WhatsApp sandbox**.
2. In the **WHEN A MESSAGE COMES IN** box, enter the Twilio inbound URL that you generated in Omnichannel for Customer Service, and save the changes.
3. To test the WhatsApp channel with the Twilio sandbox, you can send a WhatsApp message to the number provided by Twilio with a unique code that is also provided by Twilio. You can also use the sandbox message template provided by Twilio to test sending messages outside of the 24-hour window.

Create a WhatsApp channel in Omnichannel Administration

> **Important**

Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

After you create a workstream for the WhatsApp channel through Twilio, create a WhatsApp channel in the Omnichannel Administrator app.

To create a WhatsApp channel, follow these steps:

1. Sign in to the Omnichannel Administration app. Select **WhatsApp** under **Channels**.
2. In the **New WhatsApp** page, do the following.

Section	Field	Description
Twilio account details	Name	Specify a name for the WhatsApp channel.
Twilio account details	Account SID	Fetch the value from your Twilio account and paste it here.
Twilio account details	Auth Token	Get the value from your Twilio account and paste it here.

3. Select **Save**. In the **Callback information** section, the **Twilio inbound URL** field is generated with a link. Copy the link from the field.
4. Go to your Twilio console, select **Senders**, and then select the WhatsApp phone number. Under **Messaging**, paste the link that you copied in the preceding step in the **Twilio inbound URL** field.
5. In the **WhatsApp phone numbers** section, select **New WhatsApp Number**. The **New WhatsApp Number** page is displayed.
6. Do the following.

Section	Field	Description	Example value
Phone number details	Name	Specify a name for the WhatsApp channel.	WhatsApp phone number
Phone number details	WhatsApp Account	The **WhatsApp Account** field is populated by default. However, you can change the value using the lookup.	WhatsApp channel

Section	Field	Description	Example value
Phone number details	WhatsApp Number	Specify the WhatsApp number.	123456989
Work distribution	Work stream	Select the out-of-the-box workstream from the lookup. To create a new workstream, see Create work streams.	WhatsApp channel work stream

7. Select **Save**. The WhatsApp phone number is saved.
8. Select the back button on the browser to go to the WhatsApp channel page. You can see that the WhatsApp phone number is added in the **WhatsApp phone numbers** section.
9. Select **Save**.
10. In the **Validation** section, select **Validate** to validate the Account SID, Auth token, and phone numbers. After you validate, a toast notification displays with the success or error.

Create routing rules

1. Go to **Work Distribution Management** > **Work Streams**.
2. Open the out-of-the-box workstream or the one you created.
3. On the **Routing rules items** tab, you can create a routing rule to transfer the message to an appropriate agent. Select the entity as **WhatsApp Engagement Context**. For example, you can create a rule to transfer WhatsApp chat from a customer to the default queue.

When you create conditions for routing rules, the **WhatsApp Engagement Context (Conversation)** entity enables you to set the **Customer Phone Number** and **Customer First Message** attributes. The **Customer First Message** attribute lets you create a prefilled message that automatically appears in the text field of a customer chat, which can be used for routing.

Modify settings for a specific WhatsApp phone number

1. In the Omnichannel Administration app, go to your WhatsApp application and select the WhatsApp phone number you want to modify.
2. On the **General settings** tab, provide the following information:

- **Language**: Select the preferred language for your WhatsApp phone number.
- **Work stream**: Select an existing workstream or create a new one.
- **Enable file attachments for customers**: Set to **Yes** to allow customers to send file attachments to agents. Otherwise, set **No**.
- **Enable file attachments for agents**: Set to **Yes** to allow agents to send file attachments to customers. When the agent sends an attachment, the app sends the blob storage URL to the channel. Otherwise, set **No**.

  To learn more about attachments, see File attachments.

  To learn more about uploading media in WhatsApp, see Twilio support documentation.

3. On the **Automated messages** tab, configure automated messages.
4. On the **Message templates** tab, you can configure agents' ability to send WhatsApp approved messages. If 24 hours pass after a customer's last message, agents will only be able to send messages from WhatsApp approved templates until the customer responds.

   > **Note**
   >
   > Create your message templates in your Twilio account and have them approved by WhatsApp before you add them in Omnichannel for Customer Service.

   Select **New** to create a template and complete the following fields:

   - **Name**: Label the group of messages that go in this template.
   - **Message trigger**: Select the event that triggers the message to be sent.
   - **Message description**: Give the message template a description.

   Select **Save** and the **Localization Data (Message template)** panel appears. Select **New localization** and complete the following fields:

   - **Language code**: Select the language for the message.
   - **Localized text**: Write the message in the language specified. You must create localized text for each translation of the message.

5. On the **Surveys** tab, configure a post-conversation survey.

See also

Understand and create workstreams
Create and manage routing rules
Configure automated messages
Configure a post-conversation survey
Skill-based routing
Create message templates
Templates
Delete a configured channel
Support for live chat and asynchronous channels

Configure a WeChat channel

Article • 10/27/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

WeChat channel

organizations enhance business efficiencies in certain geographical areas by integrating social messaging channels such as WeChat, which has a large user base in Asia, into Omnichannel for Customer Service.

> **Note**
>
> The WeChat channel isn't available in the Government Community Cloud (GCC) region.

Prerequisites

Make sure that the following prerequisites are met:

- WeChat is provisioned in your environment. More information: Provision Omnichannel for Customer Service

  > **Note**
  >
  > To enable the WeChat channel in an existing environment, you must upgrade to the latest version of Omnichannel for Customer Service. For information, **Upgrade Omnichannel for Customer Service**.

- An active subscription to the WeChat service account or sandbox account (if using sandbox for testing) exists and is stored as a contact on your phone. You'll initiate WeChat conversations by contacting the subscription account. More information: WeChat documentation

- Verify that you have permissions on the secure columns. More information: Configure permissions to access secure columns

Get WeChat account details

To integrate a WeChat channel with Omnichannel for Customer Service, get the following details:

- **Original ID:** Original ID in the WeChat service or sandbox account.
- **Developer ID:** Application ID associated with your WeChat service or sandbox account.
- **Developer password:** Application secret used for authentication.
- **Token:** Customer-defined string.
- **Message encryption key:** Message encryption key in WeChat. If you're using a sandbox WeChat account, use a key of your choice.

Create a WeChat channel

To create a WeChat channel

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, in **Customer support**, select **Channels**.

   b. In **Accounts**, for **Messaging accounts**, select **Manage**.

2. On the **Accounts and channels** page, select **New account**.

3. Enter the following details:
   a. On the **Channel details** page, specify a name and in **Channels**, select **WeChat**, and select **Next**.
   b. In **Account details**, enter the following information:

      - **Original ID:** Specify the WeChat account number.
      - **Developer ID (AppID):** Specify the WeChat Developer ID.
      - **Developer password (AppSecret):** Specify the WeChat Developer password.
      - **Token:** Specify the WeChat token.
      - **Message encryption key (EncodingAESKey):** Specify the WeChat Message encryption key for service account. If you're configuring a sandbox account,

use a key of your choice.

a. On the **Callback information** page, copy the values that you see in the two boxes. You'll update the copied information in the WeChat account.
b. Select **Done**. The WeChat account instance is created.

4. To configure routing and work distribution, you can create a workstream or select an existing one.

5. Select the workstream that you've created for the WeChat channel and on the workstream page, select **Set up WeChat**, and do the following steps:

   a. On the **WeChat setup** dialog box, on the **WeChat** page, select the account that you created.

   b. On the **Language** page, select a language.

   c. On the **Behaviors** page, configure the following options:

      - Custom automated messages
      - Post-conversation survey

   d. On the **User features** page, set the toggle for **File attachments** to **On** and select the following checkboxes if you want to allow agents and customers to send and receive file attachments. More information: Enable file attachments.

      - Customers can send file attachments
      - Agents can send file attachments

   e. Verify the settings on the **Summary** page, and select **Finish**. The WeChat channel instance is configured.

6. Configure routing rules. More information: Configure work classification.

7. Configure work distribution. More information: Work distribution settings

8. Add a bot. More information Configure a bot.

9. In **Advanced settings**, configure the following options based on your business needs:

- Sessions
- Agent notifications
- Context variables
- Smart assist bots
- Quick replies

Configure WeChat details

If you're using the service account of WeChat, perform the following steps:

1. Sign in to your WeChat Service Account, and then paste the IP allowlist and server address, which you copied from Omnichannel admin center in the preceding procedure, in their respective boxes. The IP address of the Omnichannel for Customer Service application is not blocked in the WeChat firewall. The server address helps establish the connection between WeChat and Omnichannel for Customer Service.

2. In WeChat, make sure that you select **Security Mode** under **Message Encryption Method** for encryption of the chat messages.

3. Select **Submit**.

Create a WeChat channel in Omnichannel Administration

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

1. In Omnichannel Administration, under **Channels**, select **WeChat**.

2. Select **New**. The **New WeChat** page appears.

3. On the **General** tab, in the **Step 1: Account details** area, enter the following details:

   - **Name:** Specify a name for the channel.
   - **Owner:** Accept the default owner, or change to specify a different owner.
   - **Service Account:** Specify the WeChat service or sandbox account number.
   - **Developer ID (AppID):** Specify the WeChat Developer ID.
   - **Developer password (AppSecret):** Specify the WeChat Developer password.
   - **Token:** Specify the WeChat token.
   - **Message encryption key (EncodingAESKey):** Specify the WeChat Message encryption key for service account. If you're configuring a sandbox account, use a key of your choice.

4. In the **Step 2: Work distribution** area, for **Work Stream**, select the out-of-the-box workstream for WeChat. Alternatively, you can create a work stream for WeChat

and associate it with the WeChat channel.

5. Select **Save**. The details are saved, and data is populated in the **Step 3: Callback information** section.

6. Copy the information that's displayed in the boxes. This step is required for only WeChat service account.

Modify settings for a specific WeChat account

1. In the Omnichannel Administration app, go to your WeChat application and select the WeChat account you want to modify.

2. On the **General settings** tab, provide the following information:

   - **Language**: Select the preferred language for your WeChat account.
   - **Work stream**: Select an existing workstream or create a new one.
   - **Enable file attachments for customers**: Set to **Yes** to allow customers to send file attachments to agents. Otherwise, set **No**.
   - **Enable file attachments for agents**: Set to **Yes** to allow agents to send file attachments to customers. When the agent sends an attachment, the app uploads the attachment to WeChat and captures the media ID. Otherwise, set **No**.

     To learn more about attachments, see Enable file attachments.

     To learn more about uploading media in WeChat, see WeChat developer documentation.

3. On the **Automated messages** tab, configure automated messages.

4. On the **Surveys** tab, configure a post-conversation survey.

Privacy notice

By enabling this feature, your data will be shared with WeChat and flow outside of your organization's compliance and geo boundaries (even if your organization is in a Government Cloud Community region). Consult the feature technical documentation for more information here.

Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, such as laws relating

to monitoring, recording, and storing communications with their end users. This includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

See also

Channels in Omnichannel for Customer Service
Use a WeChat channel
Delete a configured channel
Support for live chat and asynchronous channels

Configure Microsoft Teams channel

Article • 04/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Use Microsoft Teams as an engagement channel for support of internal functions—such as technical support, human resources, and finance—to allow organizations to connect their employees with internal support personnel by using the Omnichannel Add-in for Dynamics 365 Customer Service.

Prerequisites

Make sure that the following prerequisites are met:

- Microsoft Teams is installed in your environment. More information: Provision Omnichannel for Customer Service

  > **Note**
  >
  > To enable the Microsoft Teams channel in an existing Omnichannel for Customer Service environment, you must upgrade to the latest version of Omnichannel for Customer Service. More information: **Upgrade Omnichannel for Customer Service**

- An app is created and configured in **Teams** > **Developer Portal**. More information: Create and register an app

Configure a Microsoft Teams channel

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, in **Customer support**, select **Channels**.

b. In **Accounts**, for **Messaging accounts**, select **Manage**.

2. On the **Accounts and channels** page, select **New account**.

3. Enter the following details:
   a. On the **Channel details** page, enter a name and select **Microsoft Teams** in **Channels**.
   b. On the **Account details** page, in **Account name**, enter the Microsoft Teams name that you use.
   c. On the **Callback information** page, copy the value in the **Bot ID** box. You'll use it in the Teams app to update the value for the bot ID.
   d. Select **Done**. The account is added to the list.

4. To configure routing and work distribution, go to the **Workstreams** page and create a workstream.

5. Select the workstream that you've created for the Microsoft Teams channel and on the workstream page, select **Set up Microsoft Teams** to configure the following options:

   a. On the **Microsoft Teams setup** page, in the **Available Microsoft Teams accounts** list, select the number that you created.

   b. On the **Language** page, select the language.

   c. On the **Behaviors** page, configure the following options:

      - Custom automated messages
      - Post-conversation survey

   d. On the **User features** page, set the toggle for **File attachments** to **On** and select the following checkboxes if you want to allow agents and customers to send and receive file attachments. More information: Enable file attachments

      - Customers can send file attachments
      - Agents can send file attachments

   e. Turn on the toggle for **Voice and video calls** (preview), and select an option in the **Calling options** dropdown list. At runtime, when agents are in conversation with customers and need to use audio or video to resolve issues, the call and video options are available to them.

      ⓘ Note

> Voice and video calls in Microsoft Teams is in preview, therefore, we recommend that you don't use it in production. Use it only in test and development environments.

f. Verify the settings on the **Summary** page, and select **Finish**. The Teams channel instance is configured.

6. Configure routing rules. More information: Configure work classification
7. Configure work distribution. More information: Work distribution settings
8. Add a bot. More information Configure a bot
9. In **Advanced settings**, configure the following options based on your business needs:

   - Sessions
   - Agent notifications
   - Context variables
   - Smart assist bots
   - Quick replies

Configure Teams details

1. In the Teams app, select the ellipses (...) and then select **Developer Portal**. The **Developer Portal** page appears.
2. On the **Apps** tab, select the app that you configured for Omnichannel for Customer Service.
3. Select **App features** under **Configure**.
4. On the **App features** page, select **Bot**, then select **Enter a bot ID**, and paste the bot ID value.
5. Select the required options, save, preview, and publish.

> **Note**
>
> If you receive an error when trying to add a bot to the team, refer to **Prepare your Microsoft 365 tenant**.

Configure a Microsoft Teams channel in Omnichannel Administration

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

1. In Omnichannel Administration under **Channels**, select **Teams**. The **New Teams Channel** page appears.
2. In **Step 1: Account details**, enter the following details:
   - **Name:** Specify a name for the channel.
   - **Owner:** Accept the default value, or specify a different value.
3. In **Step 2: Work distribution**, select the out-of-the-box work stream for Teams. Alternatively, you can create a work stream for Teams and associate it with the Teams channel.
4. Select **Save**. The Teams channel is saved.
5. In **Step 3: Callback information**, copy the value that's displayed in **Bot ID**.
6. Optionally, on the **Automated messages** tab, configure automated messages.
7. Optionally, on the **Surveys** tab, configure a post-conversation survey.

Modify settings for a specific account

1. In the Omnichannel Administration app, go to **Microsoft Teams** and select the account you want to modify.
2. On the **General settings** tab, provide the following information:
   - **Language**: Select the preferred language for your Teams account.
   - **Work stream**: Select an existing work stream or create a new one.
   - **Enable file attachments for customers**: Set to **Yes** to allow customers to send file attachments to agents. Otherwise, set **No**.

- **Enable file attachments for agents**: Set to **Yes** to allow agents to send file attachments to customers. When the agent attempts to send an attachment, the app requests the customer's consent. The attachment is stored in the customer's OneDrive. Otherwise, set **No**.

  To learn more about attachments, see Enable file attachments.

  To learn more about uploading media in Microsoft Teams, see Microsoft Teams documentation.

3. On the **Automated messages** tab, configure automated messages.

4. On the **Surveys** tab, configure a post-conversation survey.

See also

Channels in Omnichannel for Customer Service
Configure automated messages
Use Microsoft Teams channel
Delete a configured channel
Support for live chat and asynchronous channels

Configure custom messaging channels

Article • 07/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Apart from built-in channels like chat and email, your organization can integrate custom messaging channels like Direct Line and Telegram with Omnichannel for Customer Service. With the custom messaging channel capability, you can:

- Bring in the channels your customers already use so that you can engage with them in familiar ways.
- Integrate line-of-business or in-house channels that are specific to your organization.
- Easily configure the administrator experience in the Customer Service admin center.
- Create a single, unified agent experience in the Omnichannel for Customer Service app.

Prerequisites

- Have a bot that's built using the Microsoft Bot Framework and registered with Azure Bot Service. Make sure to register the bot resource as a multitenant app.
- Connect the custom channel to the Azure bot resource.
- Have the app ID.
- Have the client secret value.

Configure a custom messaging channel

1. In the Customer Service admin center, under **Customer support**, select **Channels**. In **Accounts**, for **Messaging accounts**, select **Manage**.

2. On the **Accounts and channels** page, select **New account**.

3. Enter the following information:

    - **Channel details**:

    - **Name**: Enter a name for the custom messaging account.
    - **Channel**: Select **Custom** from the list.
    - **Method**: Select **Azure bot framework** from the list, and then select **Next**.

  - **Account details**:
    - **Microsoft app ID**: Enter the app ID.
    - **Client secret**: Enter the client secret value.

4. Select **Validate**. After validation succeeds, select **Next**.

5. Under **Custom channel**, select **Add**.

6. Enter the following information:

   - **Name**: Enter a name for the custom messaging channel.
   - **Channel**: Select a messaging channel from the list.

7. Select **Add** to add the channel to the account.

   Add more custom channels to the same account if needed.

8. Select **Save and close**.

9. Configure callback information.

Configure workstream and routing rules

1. In Omnichannel for Customer Service, select **Workstreams**, and then create a workstream. Be sure to select **Messaging** for **Type** and **Custom** for **Channel**.

2. Select the workstream that you created for the custom channel.

3. Select **Set up Custom**.

4. On the **Custom channel** page, select the custom messaging account you created earlier.

5. On the **Language** page, select the required language.

6. On the **Behaviors** page, configure the following options:

   - Custom automated messages
   - Post-conversation survey

7. On the **User features** page, if you want customers or agents, or both, to send file attachments, turn on **File attachments** and select the appropriate options.

8. Verify the settings on the **Summary** page, and then select **Finish**.
9. Configure routing rules.

Configure callback information

1. Copy the value in **Messaging endpoint (URL)**.
2. In another browser tab or window, open your Azure bot resource on the **Azure Portal** > **Bot Channel Registration** page.
3. Paste the messaging endpoint URL in the **Messaging endpoint** field.
4. Select **Apply**, and then close the Azure portal.
5. Select **Save and close**.

Create a workstream in Omnichannel Administration

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

1. Sign in to Dynamics 365, and go to the Omnichannel Administration app.
2. Select **Work Streams** under **Work Distribution Management**.
3. Select **New** to create a new workstream.
4. Specify the values for the fields.
5. Select the **Custom** option for the **Channel** field.
6. Select **Save** to save the changes.

You've created a workstream for the custom channel. To learn more, see Create workstreams.

Create a custom messaging account in Omnichannel Administration

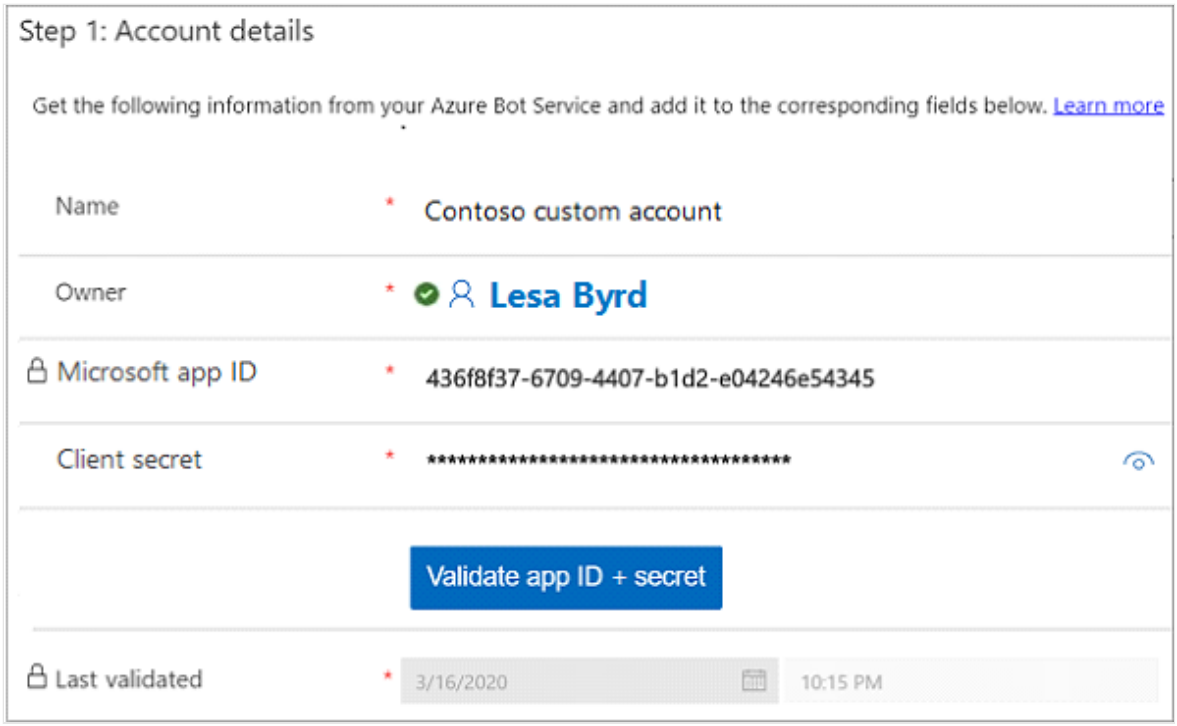
After you create a workstream for a custom channel, you need to create a custom channel with the details of the **Microsoft app ID** and **Client secret** that you retrieved while registering your messaging channel in Azure Bot Service.

To create a custom channel, follow these steps:

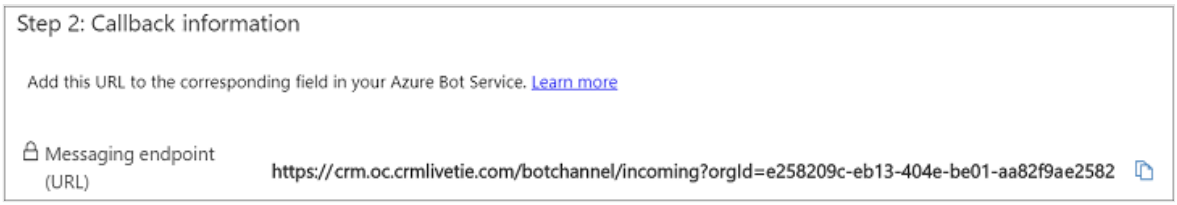
1. Sign in to Omnichannel Administrator.
2. Select **Custom** under **Channels**.
3. Select **New** in the **Active Custom messaging account** view.
4. In the **New Custom messaging account** page, specify the values for the following fields:

Section	Field	Description	Example value
Account details	Name	Specify a name for the custom channel.	Contoso custom channel
Account details	Microsoft app ID	Copy and paste the **Microsoft app ID** that you saved earlier from the Azure Bot Channel Registration page. To learn more, see Get registration password.	cae1d83e-8b07-4fca-8072-c2eb3444vxyz
Account details	Client secret	Copy and paste the **Client secret** that you saved earlier from the Azure Bot Channel Registration page. To learn more, see Get registration password.	

5. Select **Validate app ID + secret** to validate the **Microsoft app ID** and **Client secret** values. After the validation, a toast notification is displayed. Also, the **Last validated** field shows time and date. This ensures that bots are active and client secret refreshes are consumed.



6. Select **Save** to save the changes. After you save, in the **Callback information** section, the **Message endpoint (URL)** field is generated with a URL. Copy the URL from the field.



7. Go to the **Azure Portal** > **Bot Channel Registration** page, paste the URL into the **Message endpoint** field, and save the changes.

8. In the **Channels** section, select **New Custom messaging channel**. The **New Custom messaging channel** page is displayed.

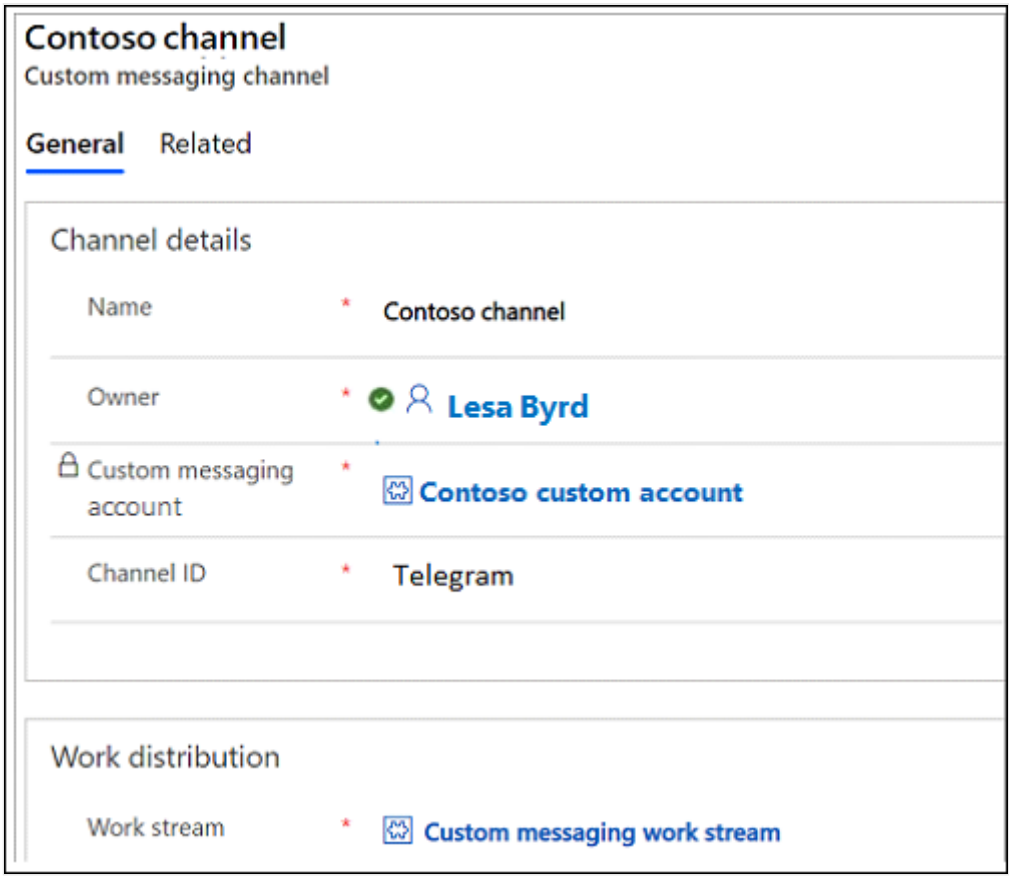
   After you create a **Custom messaging account**, you need to create a custom messaging channel, which is the actual channel from which Omnichannel for Customer Service agents will receive messages from the customer.

9. On the **New Custom messaging account** page, specify the values for the following fields:

Section	Field	Description	Example value
Details	Name	Specify a name for the custom channel	Contoso channel
Details	Custom Messaging	The **Custom messaging account** field is populated. However, you can change	Contoso custom channel

Section	Field	Description	Example value
	Account	the value using the lookup.	
Details	Channel ID	Select a channel from the list. The list might contain line-of-business (in-house) messaging or another messaging channel.	Telegram
Work distribution	Work stream	Select a workstream from the lookup.	Contoso custom channel work stream

> **Note**
>
> A **Custom messaging account** can have multiple unique channel IDs. Don't add two or more same Channel IDs to a **Custom messaging account** because the Azure Bot Framework supports only one messaging account per App ID. For example, for **Contoso custom account**, you can't add two or more **Telegram** Channel IDs.

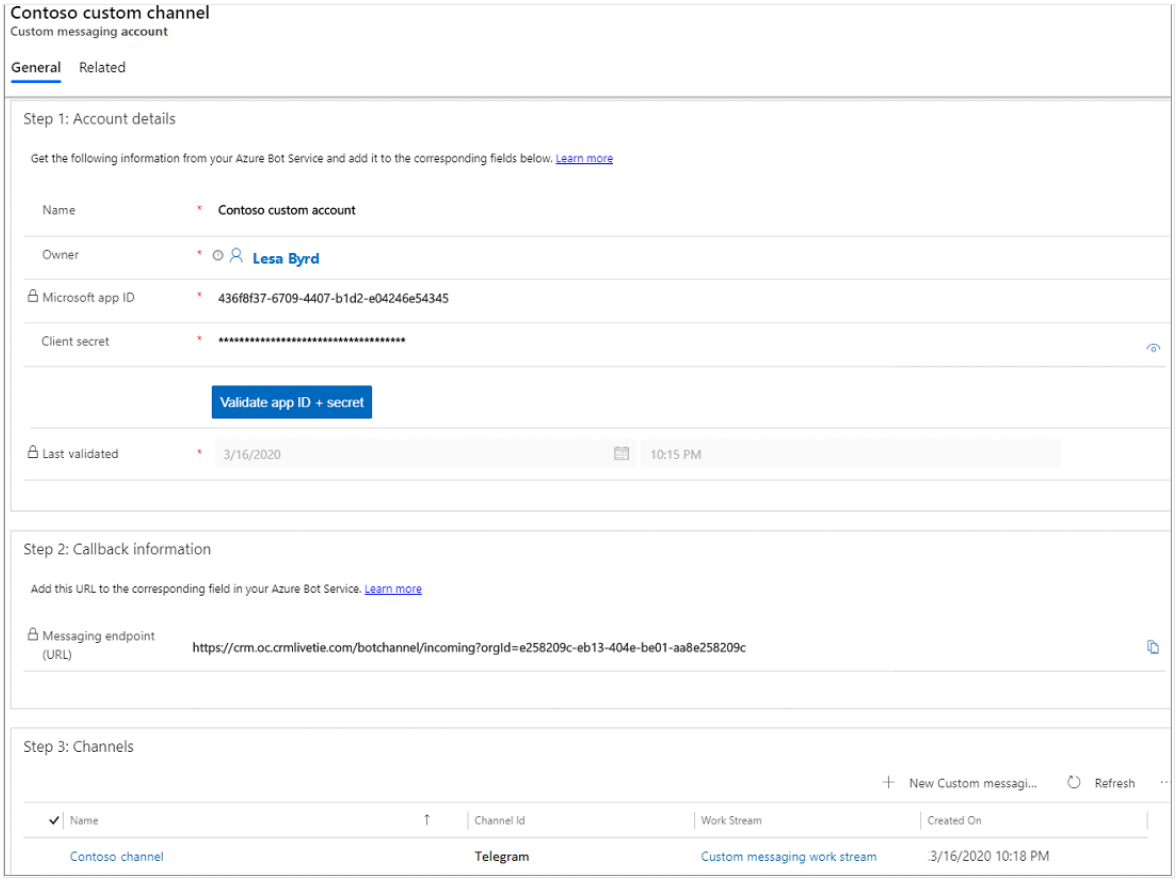


10. Optionally, on the **Surveys** tab, configure a post-conversation survey.

11. Select **Save** to save the custom messaging channel.

12. Select the back button on the browser to go to the custom messaging account page. You can see that the custom messaging channel is added in the **Channels** section.

13. Select **Save** to save the configurations.



To configure other options in the workstream, see the following:

- Skill-based routing
- Productivity tools
- Smart assist
- Templates

Modify settings for a specific custom channel

1. In the Omnichannel Administration app, go to **Custom** and select the custom channel you want to modify.

2. On the **General settings** tab, provide the following information:

    - **Language**: Select the preferred language for your custom channel.

    - **Work stream**: Select an existing workstream or create a new one.

- **Enable file attachments for customers**: Set to **Yes** to allow customers to send file attachments to agents. Otherwise, set **No**.
- **Enable file attachments for agents**: Set to **Yes** to allow agents to send file attachments to customers. When the agent sends an attachment, the app sends the blob storage URL to the channel. Otherwise, set **No**.

  To learn more about attachments, see Enable file attachments.

  To learn more about uploading media in Direct Line, see Azure Bot Service documentation.

  To learn more about uploading media in Telegram, see the Telegram Bot API.

3. On the **Automated messages** tab, configure automated messages.
4. On the **Surveys** tab, configure a post-conversation survey.

Next steps

Test your custom messaging channel

See also

Bring your own custom messaging channel using Direct Line
Support for live chat and asynchronous channels

Use SMS channels

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Channels overview

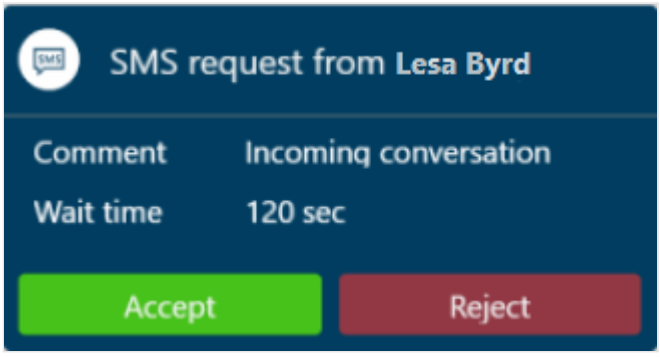
When you sign in to Omnichannel for Customer Service, you can see your work items in the Omnichannel Agent Dashboard. To learn more, see View agent dashboard and agent conversations (work items).

Prerequisite

Make sure your administrator has configured a TeleSign or Twilio channel in Omnichannel for Customer Service.

Incoming chat notifications

You'll receive a notification when a customer requests a conversation through TeleSign or Twilio. You can accept the chat request, after which a session starts and you'll see the communication panel in which you can exchange messages with the customer.



As an agent in Omnichannel for Customer Service, you can:

- View customer information on Active Conversation form.
- View the communication panel.
- Use call options and visual engagement in live chat.

- Monitor real-time customer sentiment.
- Manage sessions.
- Manage applications.
- Use these productivity tools:
  - Use agent scripts
  - View smart-assist cards
  - Use the productivity pane
- Create a record.
- Search, link, and unlink a record.
- Search for and share knowledge articles.
- Take notes specific to a conversation.
- Understand conversation states.
- Manage presence status.
- Search for transcripts.
- View conversation and session forms.
- View the active conversations for an incoming conversation request.
- Search for transcripts.

See also

Configure SMS channel for Twilio

Use Facebook channel

Article • 03/14/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Facebook channel overview

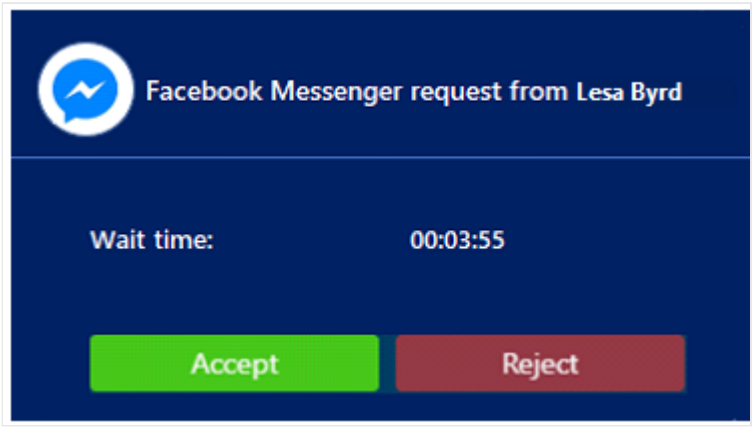
When you sign in to Omnichannel for Customer Service, you can see your work items in Omnichannel Agent Dashboard. To learn more, see View agent dashboard and agent conversations (work items).

Prerequisite

Make sure your administrator has configured a Facebook channel.

Incoming Facebook notification

You'll receive a notification when a customer requests a Facebook conversation. Accepting the Facebook request starts a session and you'll see the communication panel in which you can exchange messages with the customer.



In Omnichannel for Customer Service, you can:

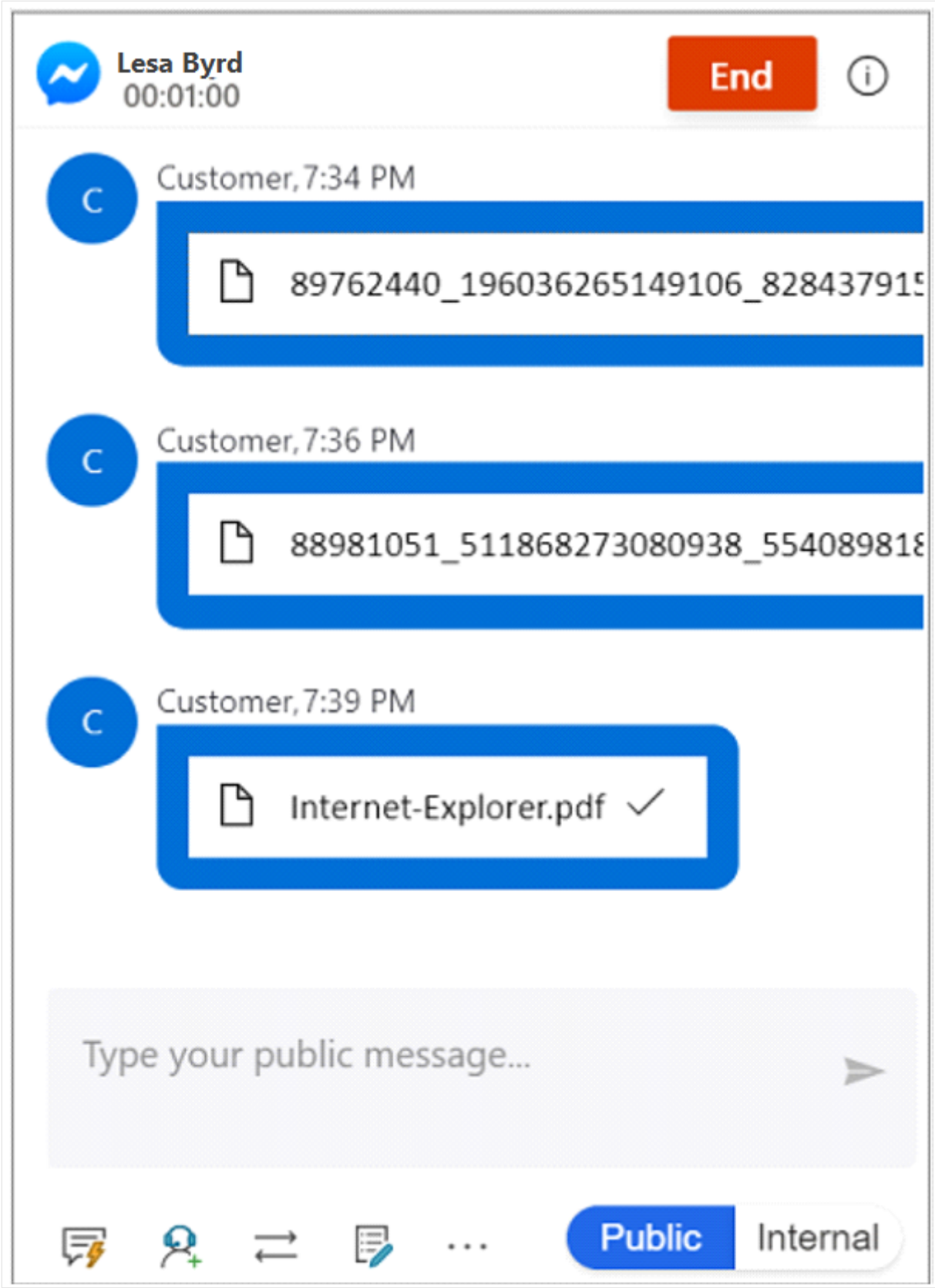
- View customer information on Active Conversation form
- View communication panel

- Use call options and visual engagement in live chat
- Monitor real-time customer sentiment
- Manage sessions
- Manage applications
- Use productivity tools
  - Use agent scripts
  - View Smart assist
  - Use productivity pane
- Create a record
- Search, link, and unlink a record
- Search for and share knowledge articles
- Take notes specific to conversation
- Understand conversation states
- Manage presence status
- Search for transcripts
- View conversation and session forms
- View active conversations for an incoming conversation request
- Search for transcripts

Send and receive file attachments

You can send file attachments to customers during a Facebook channel conversation. Before you send a file, make sure you understand the file size limit and file extension types set by your administrator.

You can see the files that you receive from a customer on the communication panel. To view the file, select it and save it to your computer. The file name you see on an image that was sent by a customer might not reflect the actual file name, but a randomly generated number.

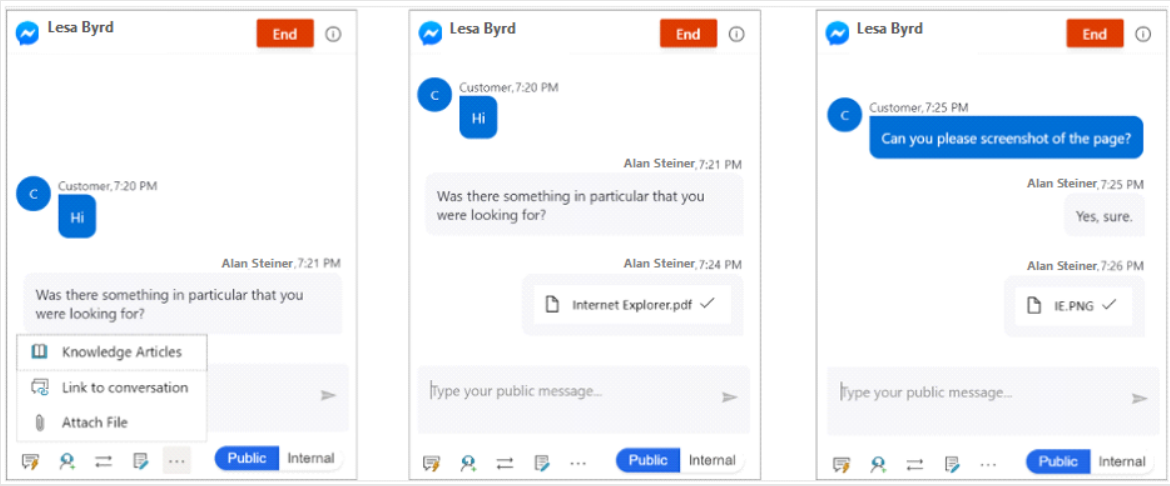


If a customer sends an unsupported file extension type, you will see an error message in the communication panel: **Error: Customer sent an unsupported message type**.

Send a file

To send a file, follow these steps:

1. Select the ellipsis (...) in the communication panel.
2. Select **Attach file**. A window will be displayed.
3. Browse and select the file to send it.



To learn more about the Facebook channel setup, see Configure a Facebook channel.

Privacy notice

Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, such as laws relating to monitoring, recording, and storing communications with their end users. This includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

See also

Configure a Facebook channel

Use Google's Business Messages channel

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

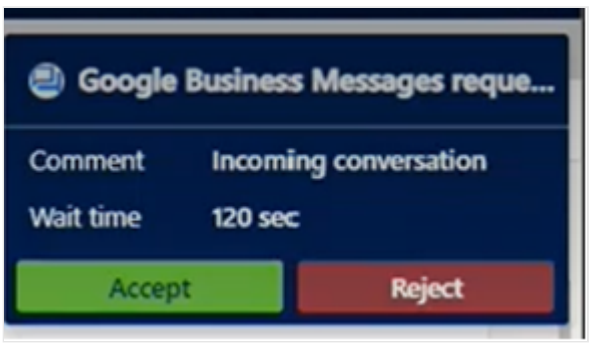
When you sign in to Customer Service workspace or Omnichannel for Customer Service, you can see your work items in the Omnichannel Agent Dashboard. To learn more, see View agent dashboard and agent conversations (work items).

Prerequisites

Make sure your administrator has configured the Google's Business Messages channel in Omnichannel for Customer Service. More information: Configure Google's Business Messages channel

Incoming chat notifications

You'll receive a notification when a customer requests a conversation through Google's Business Messages. You can accept the chat request, after which a session starts and you'll see the communication panel in which you can exchange messages with the customer.



In Omnichannel for Customer Service, you can:

- View customer information on Active Conversation form.
- View the communication panel.

- Use call options and visual engagement in live chat.
- Monitor real-time customer sentiment.
- Manage sessions.
- Manage applications.
- Use these productivity tools:
  - Use agent scripts
  - View smart-assist cards
  - Use the productivity pane
- Create a record.
- Search, link, and unlink a record.
- Search for and share knowledge articles.
- Take notes specific to a conversation.
- Understand conversation states.
- Manage presence status.
- Search for transcripts.
- View conversation and session forms.
- View customer information on Active Conversation form.
- Search for transcripts.

See also

Configure Google's Business Messages channel

Use WhatsApp channel

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

WhatsApp channel overview

When you sign in to Omnichannel for Customer Service, you can see your work items in Omnichannel Agent Dashboard. To learn more, see View agent dashboard and agent conversations (work items).

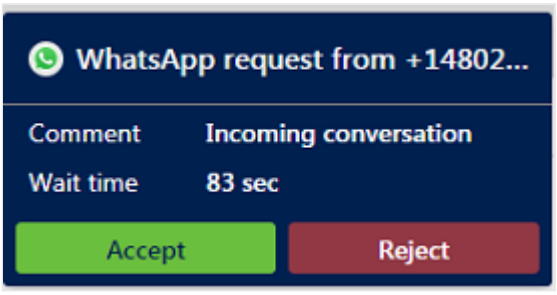
Prerequisite

Make sure your administrator has configured a WhatsApp channel through Twilio.

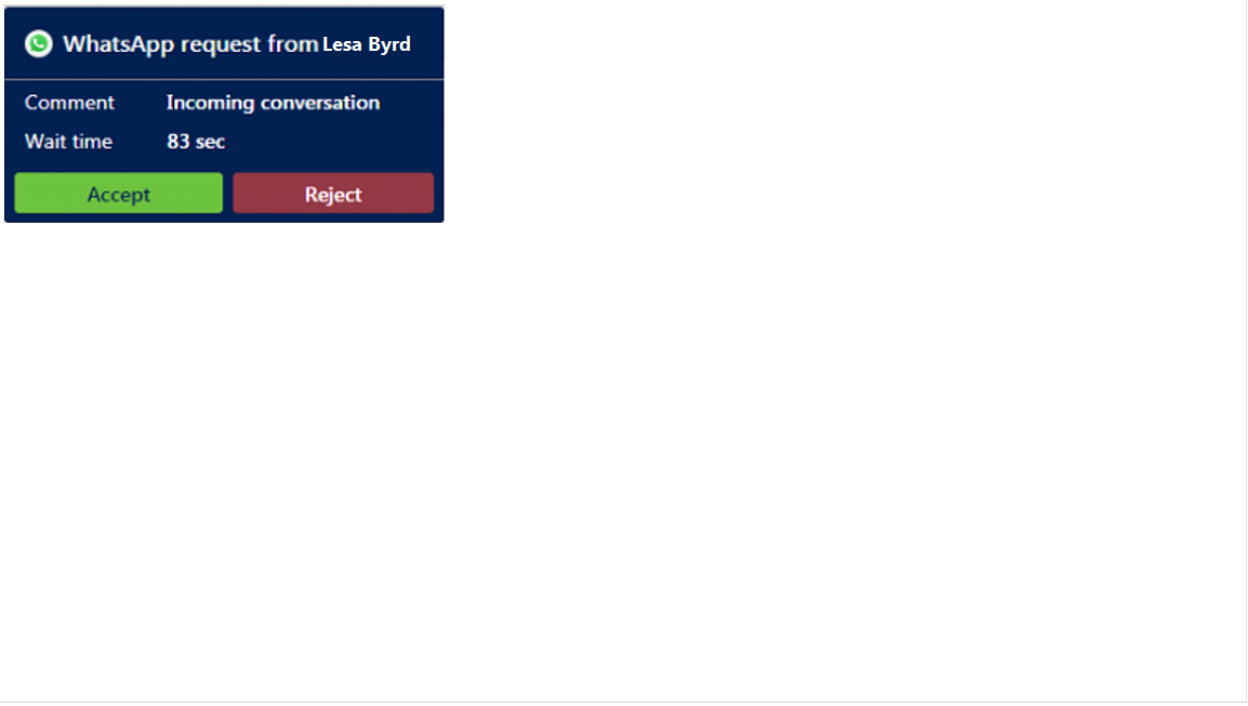
Incoming WhatsApp notification

You'll receive a notification when a customer requests a WhatsApp conversation. Accepting the WhatsApp request starts a session and you'll see the communication panel in which you can exchange messages with the customer.

Unauthenticated customer incoming notification



Authenticated customer incoming notification



In Omnichannel for Customer Service, you can:

- View customer information on Active Conversation form
- View communication panel
- Use call options and visual engagement in live chat
- Monitor real-time customer sentiment
- Manage sessions
- Manage applications
- Use productivity tools
  - Use agent scripts
  - View Smart assist cards
  - Use productivity pane
- Create a record
- Search, link, and unlink a record
- Search for and share knowledge articles
- Take notes specific to conversation
- Understand conversation states
- Manage presence status
- Search for transcripts
- View conversation and session forms
- View active conversations for an incoming conversation request
- Search for transcripts

WhatsApp message type and 24 hours session rule

- **Session messages**: According to WhatsApp, session messages are incoming messages from a customer, or outgoing responses to the incoming messages, within 24 hours. A messaging session starts when you receive a message from a customer. It lasts for 24 hours from the most recently received message. Session messages do not need to follow a template, and can include media attachments.

- **24 hours session rule**: A messaging session starts when you receive a message from a customer or reply to an incoming message from a customer. When the customer sends a message, you have 24 hours to reply to the customer from the time you received it. However, after 24 hours, if you try to send a message to the customer, an error is displayed: **This conversation has exceeded the 24 hour limit to respond to the customer.**

See also

Configure a WhatsApp channel

Use Microsoft Teams channel

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Agent dashboard for Teams channel

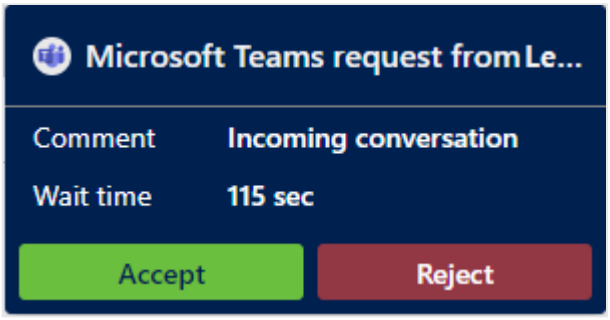
When you sign in to Omnichannel for Customer Service, you can see your work items on the Omnichannel Agent Dashboard. More information: View agent dashboard and agent conversations

Prerequisite

Make sure that your administrator has configured a Teams channel.

Incoming Teams chat notification

You'll receive a notification when a customer requests a conversation through Teams. When you accept the Teams chat request, a session is started, and you'll see the communication panel in which you can exchange messages with the customer.



In Omnichannel for Customer Service, you can:

- View customer information on Active Conversation form.
- View the communication panel.
- Use call options and visual engagement in live chat.
- Monitor real-time customer sentiment.

- Manage sessions.
- Manage applications.
- Use these productivity tools:
  - Use agent scripts
  - View smart-assist cards
  - Use the productivity pane
- Create a record.
- Search, link, and unlink a record.
- Search for and share knowledge articles.
- Take notes specific to a conversation.
- Understand conversation states.
- Manage presence status.
- Search for transcripts.
- View conversation and session forms.
- View the active conversations for an incoming conversation request.
- Search for transcripts.

If your administrator has enabled the option to initiate voice and video calls (in preview) during the conversation, the options to use voice and video will be available on the communication panel menu.

See also

Configure a Microsoft Teams channel

Use a WeChat channel

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Agent dashboard for WeChat channel

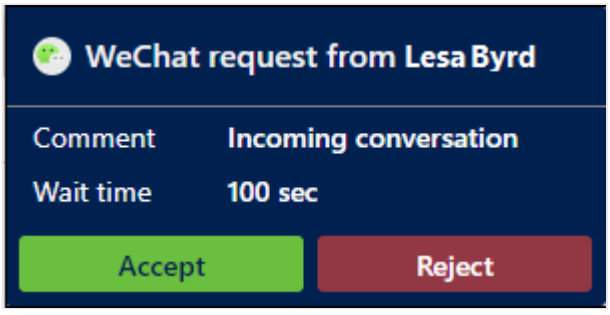
When you sign in to the Omnichannel Add-in for Dynamics 365 Customer Service, you can see your work items on the Omnichannel Agent Dashboard. More information: View agent dashboard and agent conversations

Prerequisites

Make sure that your administrator has configured a WeChat channel.

Incoming WeChat chat notification

You'll receive a notification when a customer requests a conversation through WeChat. When you accept the WeChat chat request, a session is started and you'll see the communication panel in which you can exchange messages with the customer.



In Omnichannel for Customer Service, you can:

- View customer information on Active Conversation form.
- View the communication panel.
- Use call options and visual engagement in live chat.
- Monitor real-time customer sentiment.

- Manage sessions.
- Manage applications.
- Use these productivity tools:
  - Use agent scripts
  - View smart-assist cards
  - Use the productivity pane
- Create a record.
- Search, link, and unlink a record.
- Search for and share knowledge articles.
- Take notes specific to a conversation.
- Understand conversation states.
- Manage presence status.
- Search for transcripts.
- View conversation and session forms.
- View the active conversations for an incoming conversation request.
- Search for transcripts.

See also

Configure a WeChat channel

View social profiles of contacts

Article • 05/08/2023

Omnichannel for Customer Service creates a social profile for incoming requests from asynchronous channels. After a social profile is created for a conversation within a channel, later conversations are linked to the same social profile for the channel so that you can view all the related information in one place.

How social profiles are linked with contacts

When a customer sends a message, a record is automatically created with the social profile for the channel by using the unique identifier for the customer.

With social profiles, you can do the following:

- Automatically identify customers on social channels
- Display the customer name or phone number with conversations and calls on the agent dashboard
- Send outbound messages

The social profiles are supported for the following channels.

Channel	Supported?	Visitor name
Apple Messages for Business	Yes	Visitor
Facebook	Yes	User name
Google's Business Messages	Yes	Display name
LINE	Yes	Display name
WeChat	Yes	Visitor
WhatsApp	Yes	Phone number
Custom messaging (Telegram)	Yes	User name

View social profiles

As an agent, you can see the active social profile information, such as the customer, profile name, social channel, and related social profiles.

1. In the Omnichannel for Customer Service app, select the **Search** box, and scroll to the bottom of the list.
2. Select **Search for rows in a table using advanced filters**.
3. In the **Select a table to search** flyout menu, select **Social Profiles**, and select **Continue**. The **Active Social Profiles** page displays the list of active profiles.
4. Select the profile that you want to view.
5. The **RELATED SOCIAL PROFILES** section displays the related social profiles that are automatically linked after the contact is identified through the unique identifier.

Optionally, you can update the details and save the profile. You can also deactivate or activate the social profile.

Next steps

View customer information on Active Conversation form

Integrate your own custom channel using Direct Line

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

With Omnichannel for Customer Service, you can implement a connector to integrate custom messaging channels by using Direct Line API 3.0, that's part of .NET SDK. The complete sample code illustrates how you can create your own connector. To learn more about the Direct Line API 3.0, see Key concepts in Direct Line 3.0 API.

This article explains how a channel is connected to the Microsoft Direct Line Bot Framework, which is internally attached to Omnichannel for Customer Service. The following section includes code snippets that use Direct Line API 3.0 to create a Direct Line client and the `IChannelAdapter` interface to build a sample connector.

> **Note**
>
> The source code and documentation describe the overall flow of how the channel can connect to Omnichannel for Customer Service through Direct Line, and don't focus on aspects of reliability and scalability.

Components

Adapter Webhook API Service

When the user enters a message, the adapter API is invoked from the channel. It processes the inbound request and sends a success or failure status as response. The adapter API service must implement the `IChannelAdapter` interface, and sends the inbound request to the respective channel adapter to process the request.

```
JavaScript
```

```
/// <summary>
/// Accept an incoming web-hook request from MessageBird Channel
/// </summary>
/// <param name="requestPayload">Inbound request Object</param>
/// <returns>Executes the result operation of the action method
asynchronously.</returns>
    [HttpPost("postactivityasync")]
    public async Task<IActionResult> PostActivityAsync(JToken
requestPayload)
    {
        if (requestPayload == null)
        {
            return BadRequest("Request payload is invalid.");
        }

        try
        {
            await
_messageBirdAdapter.ProcessInboundActivitiesAsync(requestPayload,
Request).ConfigureAwait(false);
        }
        catch (Exception ex)
        {
            _logger.LogError($"postactivityasync: {ex}");
            return StatusCode(500, "An error occured while handling your
request.");
        }

        return StatusCode(200);
    }
```

Channel adapters

The channel adapter processes the inbound and outbound activities, and must implement the `IAdapterBuilder` interface.

Process inbound activities

The channel adapter performs the following inbound activities:

1. Validate the inbound message request signature.

The inbound request from the channel is validated based on the signing key. If the request is invalid, an "invalid signature" exception message is thrown. If the request is valid, it proceeds as follows:

JavaScript

```
  /// <summary>
  /// Validate Message Bird Request
  /// </summary>
  /// <param name="content">Request Content</param>
  /// <param name="request">HTTP Request</param>
  /// <param name="messageBirdSigningKey">Message Bird Signing Key</param>
  /// <returns>True if there request is valid, false if there aren't.
</returns>
  public static bool ValidateMessageBirdRequest(string content, HttpRequest
request, string messageBirdSigningKey)
  {
      if (string.IsNullOrWhiteSpace(messageBirdSigningKey))
      {
          throw new ArgumentNullException(nameof(messageBirdSigningKey));
      }
      if (request == null)
      {
          throw new ArgumentNullException(nameof(request));
      }
      if (string.IsNullOrWhiteSpace(content))
      {
          throw new ArgumentNullException(nameof(content));
      }
      var messageBirdRequest = new MessageBirdRequest(
          request.Headers?["Messagebird-Request-Timestamp"],
          request.QueryString.Value?.Equals("?",
              StringComparison.CurrentCulture) != null
              ? string.Empty
              : request.QueryString.Value,
          GetBytes(content));

      var messageBirdRequestSigner = new
MessageBirdRequestSigner(GetBytes(messageBirdSigningKey));
      string expectedSignature = request.Headers?["Messagebird-Signature"];
      return messageBirdRequestSigner.IsMatch(expectedSignature,
messageBirdRequest);
  }
```

2. Convert the inbound request to a bot activity.

The inbound request payload is converted into an activity that the Bot Framework can understand.

> ⓘ **Note**
>
> The activity payload must not exceed the message size limit of 28 KB.

This Activity object includes the following attributes:

Attribute	Description
from	Stores the channel account information that consists of the unique identifier of the user and name (combination of first name and last name, separated by a space delimiter).
channelId	Indicates the channel identifier. For inbound requests, the channel ID is `directline`.
serviceUrl	Indicates the service URL. For inbound requests, the service URL is `https://directline.botframework.com/`.
type	Indicates the activity type. For message activities, the type is `message`.
text	Stores the message content.
id	Indicates the identifier that the adapter uses to respond to outbound messages.
channelData	Indicates channel data that consists of `channelType`, `conversationcontext`, and `customercontext`.
channelType	Indicates the channel name through which the customer is sending messages. For example, MessageBird, KakaoTalk, Snapchat
conversationcontext	Refers to a dictionary object that holds the context variables defined in the workstream. Omnichannel for Customer Service uses this information to route the conversation to the right agent. For example: "conversationcontext ":{ "ProductName" : "Xbox", "Issue":"Installation" } In this example, the context routes the conversation to the agent who deals with Xbox installation.
customercontext	Refers to a dictionary object that holds the customer details such as phone number and email address. Omnichannel for Customer Service uses this information to identify the user's contact record. "customercontext":{ "email":email@email.com, "phonenumber":"1234567890" }

JavaScript

```
  /// <summary>
  /// Build Bot Activity type from the inbound MessageBird request
payload<see cref="Activity"/>
  /// </summary>
  /// <param name = "messagePayload"> Message Bird Activity Payload</param>
  /// <returns>Direct Line Activity</returns>
  public static Activity PayloadToActivity(MessageBirdRequestModel
messagePayload)
  {
  if (messagePayload == null)
  {
```

```
        throw new ArgumentNullException(nameof(messagePayload));
    }
    if (messagePayload.Message?.Direction == ConversationMessageDirection.Sent
||
    messagePayload.Type == ConversationWebhookMessageType.MessageUpdated)
    {
        return null;
    }
    var channelData = new ActivityExtension
    {
        ChannelType = ChannelType.MessageBird,
        // Add Conversation Context in below dictionary object. Please refer
the document for more information.
        ConversationContext = new Dictionary<string, string>(),
        // Add Customer Context in below dictionary object. Please refer the
document for more information.
        CustomerContext = new Dictionary<string, string>()
    };
    var activity = new Activity
        {
            From = new ChannelAccount(messagePayload.Message?.From,
messagePayload.Contact?.DisplayName),
            Text = messagePayload.Message?.Content?.Text,
            Type = ActivityTypes.Message,
            Id = messagePayload.Message?.ChannelId,
            ServiceUrl = Constant.DirectLineBotServiceUrl,
            ChannelData = channelData
        };

        return activity;
    }
```

The sample JSON payload is as follows:

JSON

```
{
    "type": "message",
    "id": "bf3cc9a2f5de...",
    "serviceUrl": https://directline.botframework.com/,
    "channelId": "directline",
    "from": {
        "id": "1234abcd",// userid which uniquely identify the user
        "name": "customer name" // customer name as First Name <space> Last
Name
    },
    "text": "Hi,how are you today.",
    "channeldata":{
        "channeltype":"messageBird",
        "conversationcontext ":{ // this holds context variables defined in
Workstream
            "ProductName" : "XBox",
            "Issue":"Installation"
```

```
        },
        "customercontext":{
            "email":email@email.com,
            "phonenumber":"1234567890"
        }
    }
}
```

3. Send the activity to the message relay processor.

After building the activity payload, it calls the message relay processor's PostActivityAsync method to send the activity to Direct Line. The channel adapter should also pass the event handler, which the relay processor will invoke when it receives an outbound message from Omnichannel for Customer Service through Direct Line.

Process outbound activities

The relay processor invokes the event handler to send outbound activities to the respective channel adapter, and the adapter then processes the outbound activities. The channel adapter performs the following outbound activities:

1. Convert outbound activities to the channel response model.

The Direct Line activities are converted to the channel-specific response model.

JavaScript

```
  /// <summary>
  /// Creates MessageBird response object from a Bot Framework <see
cref="Activity"/>.
  /// </summary>
  /// <param name="activities">The outbound activities.</param>
  /// <param name="replyToId">Reply Id of Message Bird user.</param>
  /// <returns>List of MessageBird Responses.</returns>
  public static List<MessageBirdResponseModel>
ActivityToMessageBird(IList<Activity> activities, string replyToId)
  {
      if (string.IsNullOrWhiteSpace(replyToId))
      {
          throw new ArgumentNullException(nameof(replyToId));
      }

      if (activities == null)
      {
          throw new ArgumentNullException(nameof(activities));
      }

      return activities.Select(activity => new MessageBirdResponseModel
      {
```

```
            To = replyToId,
            From = activity.ChannelId,
            Type = "text",
            Content = new Content
            {
                Text = activity.Text
            }
        }).ToList();
    }
```

2. Send responses through the channel REST API.

The channel adapter calls the REST API to send an outbound response to the channel, which is then sent to the user.

JavaScript

```
    /// <summary>
    /// Send Outbound Messages to Message Bird
    /// </summary>
    /// <param name="messageBirdResponses">Message Bird Response
object</param>
    /// <returns>A <see cref="Task"/> representing the asynchronous operation.
</returns>
    public async Task
SendMessagesToMessageBird(IList<MessageBirdResponseModel>
messageBirdResponses)
    {
        if (messageBirdResponses == null)
        {
            throw new ArgumentNullException(nameof(messageBirdResponses));
        }

        foreach (var messageBirdResponse in messageBirdResponses)
        {
            using (var request = new HttpRequestMessage(HttpMethod.Post, $"
{MessageBirdDefaultApi}/send"))
            {
                var content =
JsonConvert.SerializeObject(messageBirdResponse);
                request.Content = new StringContent(content, Encoding.UTF8,
"application/json");
                await _httpClient.SendAsync(request).ConfigureAwait(false);
            }
        }
    }
```

Message relay processor

The message relay processor receives the inbound activity from the channel adapter and does the activity model validation. Before sending this activity to Direct Line, the relay processor checks whether the conversation is active for the particular activity.

To look up whether the conversation is active, the relay processor maintains a collection of active conversations in a dictionary. This dictionary contains key as User ID, which uniquely identifies the user and Value as an object of the following class:

JavaScript

```
 /// <summary>
/// Direct Line Conversation to store as an Active Conversation
/// </summary>
public class DirectLineConversation
{
    /// <summary>
    /// .NET SDK Client to connect to Direct Line Bot
    /// </summary>
    public DirectLineClient DirectLineClient { get; set; }

    /// <summary>
    /// Direct Line response after start a new conversation
    /// </summary>
    public Conversation Conversation { get; set; }

    /// <summary>
    /// Watermark to guarantee that no messages are lost
    /// </summary>
    public string WaterMark { get; set; }
}
```

If conversation is not active for the activity received by the relay processor, it does the following steps:

1. Starts a conversation with Direct Line and stores the conversation object sent by Direct Line against the user ID in the dictionary.

JavaScript

```
 /// <summary>
 /// Initiate Conversation with Direct Line Bot
 /// </summary>
 /// <param name="inboundActivity">Inbound message from
Aggregator/Channel</param>
 /// <param name="adapterCallBackHandler">Call Back to send activities to
Messaging API</param>
 /// <returns>A <see cref="Task"/> representing the asynchronous operation.
</returns>
 private async Task InitiateConversation(Activity inboundActivity,
EventHandler<IList<Activity>> adapterCallBackHandler)
```

```
 {
     var directLineConversation = new DirectLineConversation
     {
         DirectLineClient = new
DirectLineClient(_relayProcessorConfiguration.Value.DirectLineSecret)
     };
     // Start a conversation with Direct Line Bot
     directLineConversation.Conversation = await
directLineConversation.DirectLineClient.Conversations.
         StartConversationAsync().ConfigureAwait(false);

     await directLineConversation.DirectLineClient.Conversations.
         StartConversationAsync().ConfigureAwait(false);
     if (directLineConversation.Conversation == null)
     {
         throw new Exception(
             "An error occurred while starting the Conversation with direct
line. Please validate the direct line secret in the configuration file.");
     }

     // Adding the Direct Line Conversation object to the lookup dictionary
and starting a thread to poll the activities from the direct line bot.
     if
(ActiveConversationCache.ActiveConversations.TryAdd(inboundActivity.From.Id,
directLineConversation))
     {
         // Starts a new thread to poll the activities from Direct Line Bot
         new Thread(async () => await PollActivitiesFromBotAsync(
             directLineConversation.Conversation.ConversationId,
inboundActivity, adapterCallBackHandler).ConfigureAwait(false))
         .Start();
     }
 }
```

2. Starts a new thread to poll the outbound activities from Direct Line bot based on the polling interval configured in the config file. The polling thread is active until the end of conversation activity is received from Direct Line.

JavaScript

```
/// <summary>
/// Polling the activities from BOT for the active conversation
/// </summary>
/// <param name="conversationId">Direct Line Conversation Id</param>
/// <param name="inboundActivity">Inbound Activity from
Channel/Aggregator</param>
/// <param name="lineActivitiesReceived">Call Back to send activities to
Messaging API</param>
/// <returns>A <see cref="Task"/> representing the asynchronous operation.
</returns>
private async Task PollActivitiesFromBotAsync(string conversationId,
Activity inboundActivity, EventHandler<IList<Activity>>
```

```
lineActivitiesReceived)
{
    if
(!int.TryParse(_relayProcessorConfiguration.Value.PollingIntervalInMilliseco
nds, out var pollingInterval))
    {
        throw new FormatException($"Invalid Configuration value of
PollingIntervalInMilliseconds:
{_relayProcessorConfiguration.Value.PollingIntervalInMilliseconds}");
    }
    if
(!ActiveConversationCache.ActiveConversations.TryGetValue(inboundActivity.Fr
om.Id,
        out var conversationContext))
    {
        throw new KeyNotFoundException($"No active conversation found for
{inboundActivity.From.Id}");
    }
    while (true)
    {
        var watermark = conversationContext.WaterMark;
        // Retrieve the activity set from the bot.
        var activitySet = await
conversationContext.DirectLineClient.Conversations.
            GetActivitiesAsync(conversationId,
watermark).ConfigureAwait(false);
        // Set the watermark to the message received
        watermark = activitySet?.Watermark;

        // Extract the activities sent from our bot.
        if (activitySet != null)
        {
            var activities = (from activity in activitySet.Activities
                              where activity.From.Id ==
_relayProcessorConfiguration.Value.BotHandle
                              select activity).ToList();
            if (activities.Count > 0)
            {
                SendReplyActivity(activities, inboundActivity,
lineActivitiesReceived);
            }
            // Update Watermark

ActiveConversationCache.ActiveConversations[inboundActivity.From.Id].WaterMa
rk = watermark;
            if (activities.Exists(a => a.Type.Equals("endOfConversation",
StringComparison.InvariantCulture)))
            {
                if
(ActiveConversationCache.ActiveConversations.TryRemove(inboundActivity.From.
Id, out _))
                {
                    Thread.CurrentThread.Abort();
                }
            }
```

```
        }
        await
Task.Delay(TimeSpan.FromMilliseconds(pollingInterval)).ConfigureAwait(false)
;
    }
}
```

> **Note**
>
> At the heart of the code that receives the message is the GetActivitiesAsync method that takes `ConversationId` and `watermark` as parameters. The purpose of the `watermark` parameter is to retrieve the messages that aren't yet delivered by Direct Line. If the watermark parameter is specified, the conversation replays from the watermark, so that no messages are lost.

Send the activity to Direct Line

JavaScript

```
 /// <summary>
 /// Send the activity to the bot using Direct Line client
 /// </summary>
 /// <param name="inboundActivity">Inbound message from
Aggregator/Channel</param>
 /// <returns>A <see cref="Task"/> representing the asynchronous operation.
</returns>
 private static async Task SendActivityToBotAsync(Activity inboundActivity)
 {
     if
(!ActiveConversationCache.ActiveConversations.TryGetValue(inboundActivity.Fr
om.Id,
         out var conversationContext))
     {
         throw new KeyNotFoundException($"No active conversation found for
{inboundActivity.From.Id}");
     }
     await
conversationContext.DirectLineClient.Conversations.PostActivityAsync(
         conversationContext.Conversation.ConversationId,
inboundActivity).ConfigureAwait(false);
 }
```

If the conversation is active for the activity received by the relay processor, it sends the activity to the message relay processor.

End a conversation

To end the conversation, see End a conversation in Direct Line.

Next steps

Support for live chat and asynchronous channels
Markdown formats in custom channels that use Direct Line

See also

Configure custom messaging channel
MessageBird API reference
Best practices for configuring bots

Test the custom messaging channel

Article • 01/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Omnichannel for Customer Service allows you to implement a connector to integrate custom messaging channels. The complete sample code illustrates how you can create your own connector that integrates with Omnichannel for Customer Service using the Direct Line Bot.

Sample code to test the custom messaging channel

You can use the following sample code to test the custom messaging channel you want to bring in to Omnichannel for Customer Service. You can modify the sample code to suit the needs of your organization.

HTML

```
<!DOCTYPE html>
<html lang="en-US">
<head>
    <title>Web Chat: Full-featured bundle</title>

    <script src="https://cdn.botframework.com/botframework-
webchat/latest/webchat.js"></script>

    <style>
    html, body { height: 100% }
    body {
      margin: 0;
      background-color: paleturquoise;
    }
    #webchat {
      height: 100%;
      width: 100%;
    }
  </style>
</head>
<body>
```

```
        <div id="webchat" role="main"></div>
    <script>
    (async function () {
        const res = await
fetch('https://directline.botframework.com/v3/directline/conversations',
{ method: 'POST', headers: { Authorization: 'Bearer **************Insert
Direct Line Secret here ******************' }});

      const { token } = await res.json();

      (async function () {
    window.WebChat.renderWebChat({
      directLine: window.WebChat.createDirectLine({ token }),
      styleOptions: {
        rootHeight: '100%',
        rootWidth: '50%',
        bubbleMaxWidth: 1200,
        botAvatarInitials: 'C',
        userAvatarInitials: 'A',
      }
    }, document.getElementById('webchat'));
    })()
    })().catch(err => console.error(err));
   </script>
</body>
</html>
```

Next steps

Key concepts in Direct Line API 3.0

See also

Bring your own custom channel using Direct Line
Configure custom messaging channel

Markdown formats in custom channels that use Direct Line

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

In Omnichannel for Customer Service, you can send and receive messages formatted with Markdown in custom messaging channels using Direct Line API 3.0. As a developer, understanding how the Markdown format is passed through the channel and knowing the details of the format will help you update the HTML styling and tags in your own user interface.

In the Direct Line channel, when an agent sends (*outbound*) a message formatted with Markdown to a Direct Line bot, the bot receives the message in a certain format. Now, if a bot receives (*inbound*) a formatted message from a customer, it must be able to correctly interpret the message that's formatted with Markdown. As a developer, you'll need to use Markdown appropriately so that the message is formatted correctly for your agents and customers.

Markdown formats

The following table lists the Markdown formats used in inbound messages sent by the customer and outbound messages sent by the agent to the customer.

Style	Inbound	Outbound	Example
bold	**bold**	**bold**	**text**
italics	_italics_	_italics_	*text*
strikethrough	~strikethrough~	~strikethrough~	~~text~~
blockquote	> blockquote	> blockquote	text
header (levels 1–4)	### header3	### header3	**Text**

Style	Inbound	Outbound	Example
hyperlink	https://www.microsoft.com	https://www.microsoft.com	https://www.microsoft.com
hyperlink with text	[text] (https://www.microsoft.com)	[text] (https://www.microsoft.com)	Microsoft website
monospace	``` text ```	``` text ```	`text`
numbered list	<number> item one	<number> item one	1. item one 2. item two
unordered list	* item one or - item one	`* item one or - item one	* item one * item two
new line	Paragraph 1 Paragraph 2 </br>	Paragraph 1 Paragraph 2	

> **Note**
>
> Currently, we don't support the **<Shift + Enter>** key combination to add multiple line breaks.

For inbound messages, set the Markdown text to the Activity object's `text` property.

For outbound messages, the Markdown text will be received in the Activity object's `text` property (similar to a normal message).

Next steps

Bring your own custom messaging channel using Direct Line
Sample code to bring your own channel
Configure custom messaging channel

See also

Support for live chat and asynchronous channels
Enable formatted messages
Markdown formats for agents
Key concepts in Direct Line API 3.0

Support for live chat and asynchronous channels

Article • 10/09/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Support for adaptive cards

The following table lists the rich cards that are supported across different channels when you're using bots. The support categories are intentionally broad because many possible combinations of cards, features, and channels are applicable. We recommend that you use the information in the table as a base reference, and test each of your cards in the required channels.

Channel	Hero card	Thumbnail card	Audio card	Card carousel
Microsoft Teams	✓	✓	✕	✓
LINE	✓	✓	🌐	✓
Custom (Telegram)	✓	✓	🌐	✓
Custom (Direct Line)	✓	✓	✓*	✓*

✓: Supported; card is supported fully with the exception that some channels support a subset of the card actions. The number of actions allowed on each card might be limited that varies by channel.

✓*: Card elements are supported in the Webchat version of custom channel that uses Direct Line, but not in the Android version.

🌐: Card is converted to unformatted text, links might not be active, images might not be displayed, or media might not work. The behavior might vary by channel.

✕: No support

The markdown element for adaptive cards is partially supported across all chat channels. For example, the markdown element isn't supported in live chat, whereas, it's supported in LINE.

Media or audio card and date input elements for adaptive cards are only supported in Live chat channels. Adaptive card elements like text block and images are also supported across channels.

The Apple Messages for Business, Google's Business Messages, SMS, WhatsApp, and WeChat social channels don't support any cards listed in the preceding table.

For more information, see the following article: Send and Receive Media with WhatsApp Messaging on Twilio

> **Important**
>
> The message size must be less than or equal to 28 KB in all messaging channels. The size limit includes metadata like timestamps and tags.

Support for suggested actions

Suggested actions are supported fully with the exception that some channels might limit the number of actions allowed. Also, the number of actions supported varies by channel.

Channel	Supported?
Microsoft Teams	No
Apple Messages for Business	No
Facebook	Yes
Google's Business Messages	No
LINE	Yes
WeChat	No
WhatsApp	No
SMS	No
Custom messaging (Telegram)	Yes
Custom messaging (Direct Line)	Yes

Support for file attachments

You can enable file attachments on the **General settings** tab of a channel so that customers and agents can send files as attachments. Inbound attachments refer to attachments that customers send to agents, and outbound attachments refer to attachments that agents send to customers. For more information about file attachments, see Enable file attachments.

Channel	Inbound attachments	Outbound attachments
Microsoft Teams	Image, Audio, Video, Document, GIF, and Emoji	Image, Audio, Video, Document, and GIF Allowed file extensions: .jpg, .jpeg, .png, .mp3, .oga, .ogg, .amr, .mp4, .pdf, .docx, .txt, .gif, .xlsx
Apple Messages for Business	Image, Audio, Video, Document, GIF, and Emoji	Image, Audio, Video, Document, and GIF. Allowed file extensions: .jpg, .jpeg, .png, .mp3, .amr, .mp4, .pdf, .docx, .txt, .gif, .xlsx, .caf, .pkpass, .usdz
Facebook	Image, Audio, Video, Document, GIF, and Emoji	Image, Audio, Video, Document, and GIF Allowed file extensions: .jpg, .jpeg, .png, .mp3, .oga, .ogg, .amr, .mp4, .pdf, .docx, .txt, .gif, .xlsx, .xls
Google's Business Messages	Image	Image has preview. Audio, video, document only receive a link. Allowed file extentions: .jpg, .jpeg, .png, .amr, .mp4, .pdf, .docx, .txt, .gif, .xlsx
LINE	Image, Audio, Video, and GIF	Image, Audio, Video, Document, and GIF Allowed file extensions: .jpg, .jpeg, .png, .mp3, .oga, .ogg, .amr, .mp4, .pdf, .docx, .txt, .gif
WeChat	Image, Audio, and Video	Image, Audio, and Video Allowed file extensions: .jpg, .jpeg, .png, .amr, .mp4
WhatsApp	Image, Audio, Video, GIF, and PDF	Image, Audio, Video, and PDF Allowed file extensions: .jpg, .jpeg, .png, .mp3, .oga, .ogg, .amr, .mp4, .pdf

Channel	Inbound attachments	Outbound attachments
SMS (Twilio)	Image, Video, GIF, and Emoji	Image, Audio, Video, and GIF Allowed file extensions: .jpg, .jpeg, .gif, .png, .mp3, .oga, .ogg, .amr, .mp4, .pdf, .csv
Custom messaging (Telegram)	Image, Audio, Video, Document, GIF, and Emoji	Image, Audio, Video, Document, and GIF Allowed file extensions: .jpg, .jpeg, .png, .mp3, .oga, .ogg, .amr, .mp4, .pdf, .docx, .txt, .gif
Custom messaging (Direct Line)	All types except blocked types in org	All types except blocked types in org Allowed file extensions: .jpg, .jpeg, .png, .mp3, .oga, .ogg, .amr, .mp4, .pdf, .docx, .txt, .gif, .xlsx

Note

- For Microsoft Teams, when a customer sends an emoji from the Teams client, the agent receives a PNG image. When an agent sends a GIF image (outbound), the customer will receive a PNG image.
- The custom channels that use Direct Line support different types of file attachments, but it's up to the client to implement them.
- For LINE inbound and outbound messages, when a GIF image is sent, the recipient will receive a JPG image.
- For WhatsApp messages, when a customer sends an attachment in document format (for example, a DOCX, XLSX, or TXT file), the agent will receive the attachment name as message text. We recommend converting documents to PDF format before sending them as attachments.
- For newly created Twilio accounts, you must disable a security setting that blocks the ability to send media files. More information: **Extended notice and update on security changes: HTTP Authentication for Voice and Messaging Media enabled by default**

Support for emojis

Channel	Emoji behavior
Microsoft Teams	Yes. Emoji in PNG format

Channel	Emoji behavior
Apple Messages for Business	Yes. Emoji in text like "😬"
Facebook	Yes. Emoji in text like "😬"
Google's Business Messages	Yes. Emoji in text like "😬"
LINE	Yes. When an emoji is sent, the recipient sees a sticker.
WeChat	Yes. When an emoji is sent, the recipient sees characters like :-)
WhatsApp	Not supported.
SMS (Twilio)	Yes. Emoji in text like "😬"
Custom messaging (Telegram)	Yes. Emoji in text like "😬"
Custom messaging (Direct Line)	Yes. Emoji in text like "😬"

> ⓘ **Note**
>
> The custom channels that use Direct Line support emojis, but it's up to the client to implement them.

Support for stickers

Channel	Sticker behavior
Microsoft Teams	Not supported.
Apple Messages for Business	Not supported.
Facebook	Yes, as a PNG image.
Google's Business Messages	Not supported.
LINE	Not supported. Recipient sees "Sticker" text.
WeChat	Not supported. Recipient sees "Unsupported message" text.
WhatsApp	Not supported.
Custom messaging (Telegram)	Not supported.
Custom messaging (Direct Line)	Yes, as sticker image.

> ⓘ **Note**

The custom channels that use Direct Line support stickers, but it's up to the client to implement them.

Support for formatted messages

Agents can use basic formatting capabilities in their outbound messages across both asynchronous and live chat channels. However, for your agents to send and receive formatted messages, you must enable formatted messages.

The following table lists the text styles supported by Microsoft Teams, Facebook, WhatsApp, Telegram, and custom channels that use Direct Line.

Style	Live chat	Microsoft Teams	Facebook	Google's Messages for Business	WhatsApp	Custom messaging (Telegram)	Custom messaging (Direct Line)
bold	✓	✓	✓	✓	✓	✓	✓
italics	✓	✓	✓	✓	✓	✓	✓
strikethrough	✓	✓	✓	✕	✓	✓	✓
blockquote	✓	✓	✕	✕	✕	✕	✓
monospace	✓	✓	✓	✕	✓	✓	✓
hyperlink with text	✓	✓	✕	✕	✕	✓	✓
hyperlink	✓	✓	✓	✓	✓	✓	✓
new line	✓	✓	✓	✕	✓	✓	✓
headers	✓	✓	✕	✕	✕	✕	✓
numbered list	✓	✓	✕	✕	✕	✕	✓
unordered list	✓	✓	✕	✕	✕	✕	✓

Note

- Apple Messages for Business, WeChat, and SMS channels don't support formatted messages.

- A few text styles such as blockquote, headers, numbered lists, and unordered lists, are currently not supported across some channels.

Next steps

Bring your own custom messaging channel using Direct Line
Configure custom messaging channel

See also

Overview of channels
Enable file attachments
Enable formatted messages
Markdown formats in custom channels that use Direct Line
Markdown formats for agents

Preconfigured automated message triggers for asynchronous channels

Article • 05/08/2023

Preconfigured automated message triggers for agents

The following table lists the automated messages that are displayed to agents in asynchronous channels.

Channel	Message triggered	Definition	Triggering event
Apple Messages for Business, Facebook, Google's Business Messages, LINE, WeChat, WhatsApp, and custom channel	Message or attachment couldn't be sent. Error details include error code, reason for failure, message ID, timestamp, and transaction ID.	Message that's displayed to agent when the agent's message or attachment couldn't be sent	When agent's message or attachment couldn't be sent
Apple Messages for Business, Facebook, Google's Business Messages, LINE, WeChat, WhatsApp, and custom channel	Customer's file couldn't be attached because it's too large	Message that's displayed to the agent when the customer sends an attachment that exceeds the allowed limit	When customer sends an attachment that exceeds the allowed limit
Apple Messages for Business, Facebook, Google's Business Messages, LINE, WeChat, WhatsApp, and custom channel	Message couldn't be delivered: Unsupported message type	Message that's displayed to the agent when the customer sends an unsupported message type	When customer sends an unsupported message type
Custom channel	Customer disconnected	Message that's displayed to the agent when the customer gets disconnected	When the customer gets disconnected
Custom channel	Customer ended conversation	Message that's displayed to the agent when the customer ends the conversation	When customer ends the conversation

Preconfigured automated message triggers for customers

The following table lists the automated messages that are displayed to customers in asynchronous channels.

Channel	Message triggered	Definition	Triggering event
Apple Messages for Business, Facebook, Google's Business Messages, LINE, WeChat, WhatsApp, and custom channels	Customer's file couldn't be attached because it's too large	Message that's displayed to the customer when the customer sends an attachment that exceeds the allowed limit	When customer sends an attachment that exceeds the allowed limit
Apple Messages for Business, Facebook, Google's Business Messages, LINE, WeChat, WhatsApp, and custom channels	Message couldn't be delivered: Unsupported message type	Message that's displayed to the customer when the customer sends an unsupported message type	When customer sends an unsupported message type
Apple Messages for Business, Facebook, Google's Business Messages, LINE, WeChat, WhatsApp, and custom channels	Greeting Message for async Channels	Message that's displayed to the customer when the customer sends a message request to chat	When customer sends a message request to chat
Custom channel	Customer's position in queue	Message that's displayed to customer when there's a queue of customers waiting	When customer submits a request and is placed in the queue to chat with an agent because other customers are already waiting.
Custom channel	Customer is next in line	Message that's displayed to the customer when no other customer is ahead in the queue	The number of customers waiting to chat gets updated each time a customer in line is served. When no other customer is ahead in the queue, the customer waiting is notified with the message.

Next steps

Configure custom messaging channel

See also

Overview of channels
Support for live chat and asynchronous channels

Create and manage operating hours

Article • 10/03/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

Operating hours define the hours when your organization's customer support team is active and available to serve customers. By setting up operating hours, you help your customers and your organization work together to resolve issues.

The operating hour schedules cater to the following scenarios:

- Display the non-availability of customer support on public holidays that are otherwise operating hours.
- Accommodate change of calendar timings for daylight saving time twice an year for timezones that have implemented the daylight saving time.
- Set up separate schedules for agents, bots, and queues to cater to different business scenarios and product lines seamlessly for any channel.
- Define schedules to transition customer queues from bots to agents.
- Customize the display and other settings of the chat widget during non-business hours.

After you define the business hours for your organization and set up automated messages to be displayed to customers, when customers interact through a channel during non-business hours, they will see the messages that you've set. For example, customers can be shown an offline message on the chat widget as "Our agents are not available. Our business hours are between 8:00 am and 5:00 pm." Similarly, for social channels, you can configure the operating hours at the queue level. When customers

contact your agents through any of the social channels outside the business hours, they'll receive responses that you've set.

In Customer Service admin center and Omnichannel admin center, after you've created an operating hour record, you can do the following steps, depending on your requirement:

- **Queues:** Configure the operating hour on the main page of the queue.
- **Chat widget:** Add the operating hour record on the **Chat widget** tab.
- **SMS channels:** Add the operating hour record on the **Behaviors** tab of the channel instance that can be accessed through the corresponding workstream.

In Omnichannel Administration, you can add the operating hour record on the **Design** tab of the appropriate chat widget to control the display of the widget. For SMS channels and queues, the operating hour record will be available for selection on the **General** and **Summary** tabs respectively.

How work items are routed when operating hours are set

When operating hours are in effect, work items during non-business hours are handled based on the channel they come through.

For live chat and voice, the conversations and calls are routed to the queue and then closed.

For asynchronous channels, such as SMS and WhatsApp, if pick-based option is configured, the conversations remain in the open state till agents sign in and take up the assignments. If push-based option is configured, the assignment method that's configured will be used to route the conversations.

Create a record to define operating hours

You can define operating hours in the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

a. In the site map, select **Calendars** in **Operations**. The **Calendar** page appears.

b. In the **Operating Hours** section, select **Manage**.

The **Active Operating Hours** view is displayed. You can switch between various system views using the drop-down list.

2. Select **New**. The **New Operating Hour** page is displayed.

3. On the **General** tab, provide the following information:

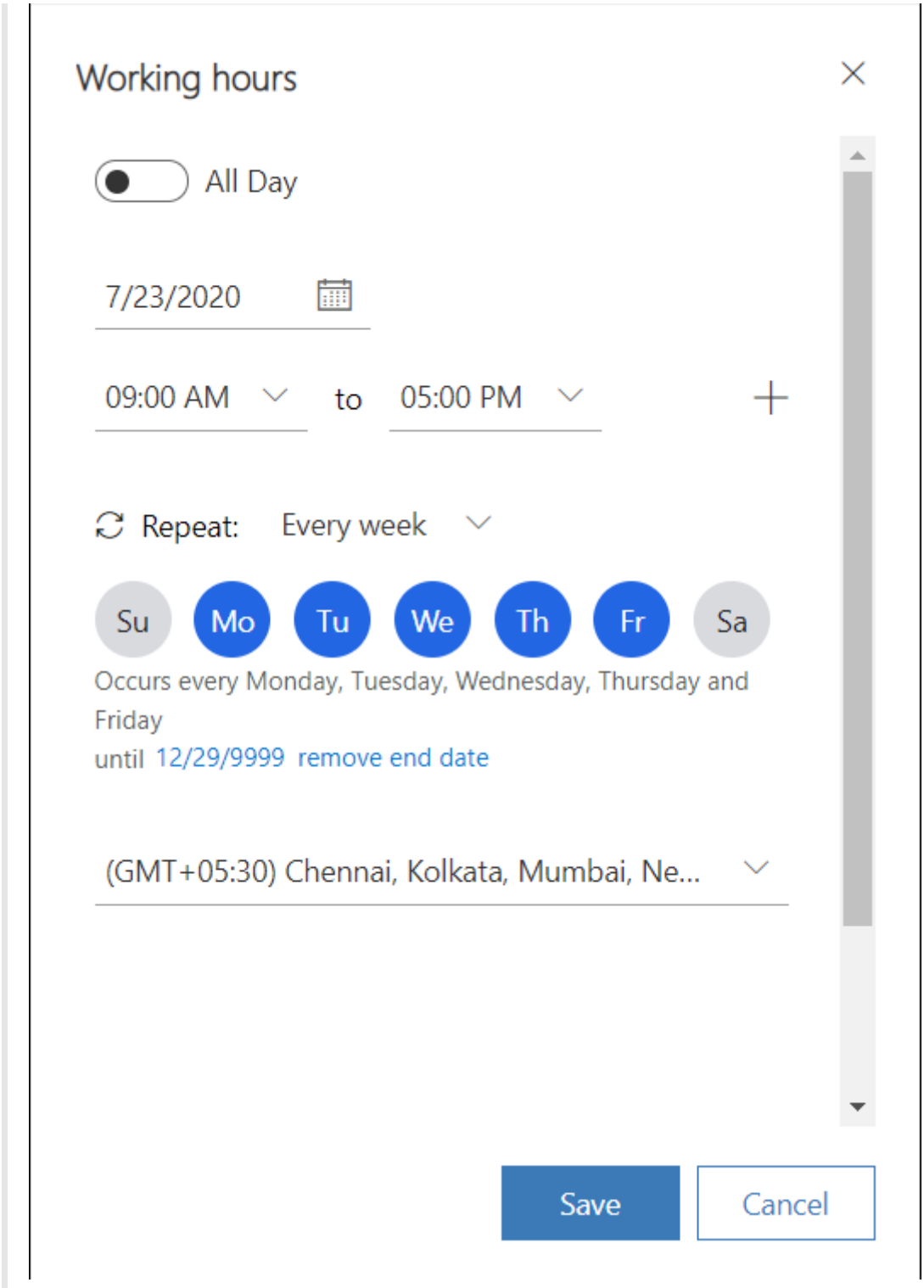
- **Name**: Enter a name for the operating hour record.
- **Owner:** Accept the default value or search to specify a different owner.
- **Description:** Enter an optional description of the operating hour record.

4. Select **Save**. The **Working Hours** tab is displayed. By default, the calendar displays the work hours defined as 8:00 am to 5:00 pm.

5. On the **Working Hours** tab, select **New** > **Working hours** in the calendar.

6. In the **Working hours** panel, set the following options to define the working hours schedule.

- **All Day:** Specify Yes, if the chat widget should be available 24/7.
- **Calendar:** Specify the period for the schedule. The option to choose dates is available only when **All Day** is Yes.
- **Time:** Select the start and end time for the schedule.
- **Repeat:** Select a recurrence option.
- **choose an end date:** Optionally, specify an end date.
- **Time zone:** Select an applicable time zone. The daylight saving timings are taken into account, if applicable for the selected time zone.



7. Select **Save**. You are returned to the **Working Hours** tab.

Define a holiday on the calendar

1. To set unavailability of customer support for a public holiday, on the calendar view, select **New** > **Holiday**.

2. Select the date or date range, and specify a reason.

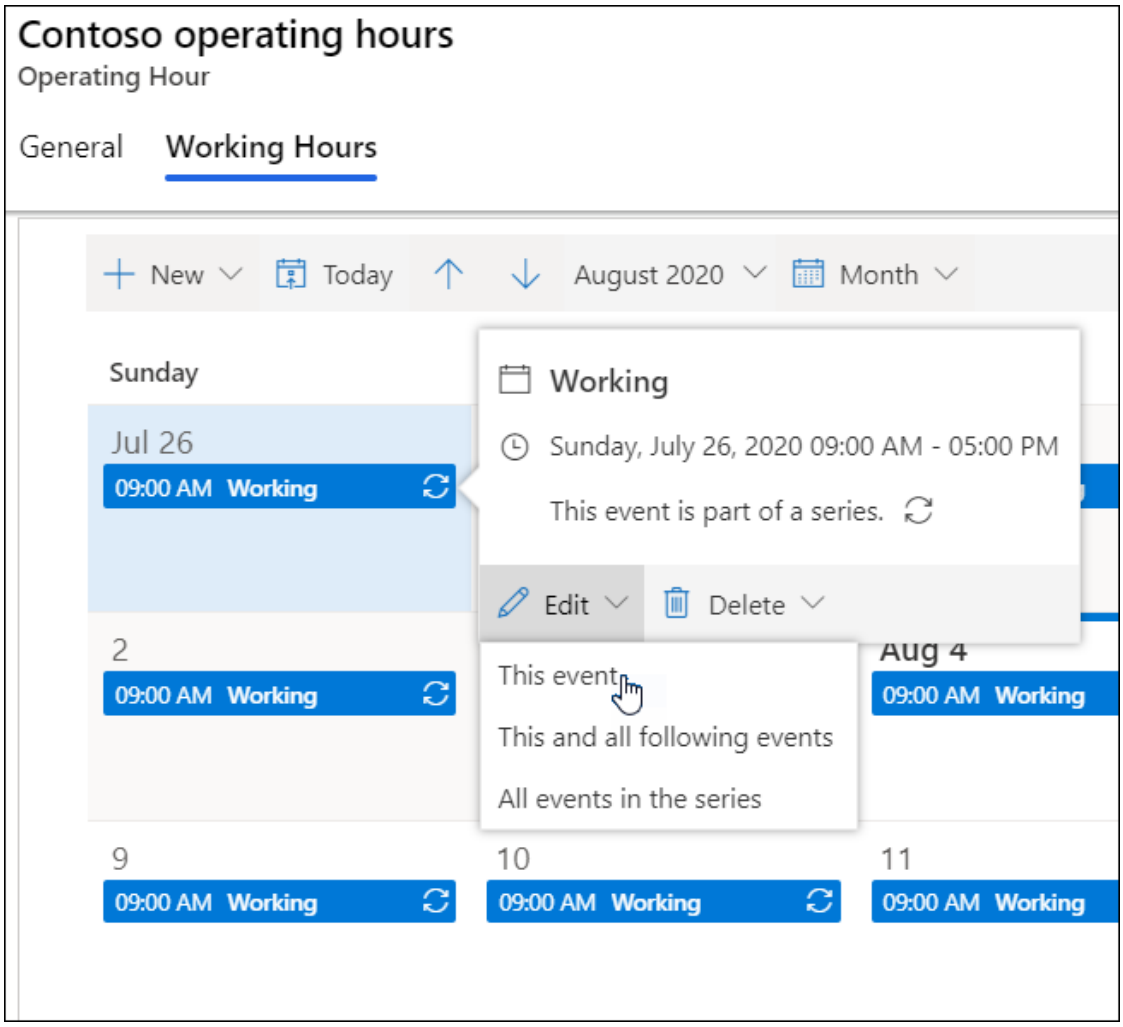
3. Save the settings.

4. Select **Save** on the navigation bar.

Edit or delete the work hour settings

You can edit or delete the operating hours schedule in an existing record.

1. Go to the record in which you want to modify the schedule.
2. Select an event on the calendar.
3. On the menu that appears, select **Edit**, and select one of the options:
   - **This event**
   - **This and all following events**
   - **All events in the series**
4. If you want to delete an event, select **Delete**.



Add operating hours to a chat widget

Do the following to specify operating hours for a chat widget:

1. Open the Chat channel settings widget, and select the **chat widget** tab.
2. Toggle the **Show widget during operation hours** to **On**.
3. In the **Operating hours name** field, browse, and select the operating hour record. The chat widget is displayed during the hours specified in the selected operating hour record.
4. Select **Show widget outside of operation hours** to display the widget outside work hours.
5. Save the changes.

Add operating hours to a queue

You can add operating hours to a queue that can later be configured for a social channel. If operation hours aren't configured, the queues will be available round the clock.

Do the following to specify operating hours for a queue:

1. Navigate to the Customer Service admin center or Customer Service Hub app, and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Queues** in **Customer Support**. The **Queues** page appears.

   b. In the **Advanced Queues** section, select **Manage**.

      The **Queues** view is displayed.

2. Open the queue for which you want to specify the operating hours.
3. On the **Operation hours** tab, select **Set operation hours**.
4. In the **Set operation hours** page, search and select the operating hour record that you want to specify.
5. Save the changes.

Limitation

You can't migrate the Calendar entity by using the export and import options and need to set up the work hours manually.

See also

Manage overflow of queues
Automated messages
Add a chat widget
Configure a pre-chat survey
Create quick replies
Create chat authentication settings
Embed chat widget in Power Apps portals

Configure and manage custom presence

Article • 02/18/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The presence status indicates an agent's availability. A presence status consists of two elements:

- **Base status**: The base presence status that indicates an agent's status. The work distribution system distributes work items to agents according to the base statuses that you select as allowed presences at the time of creating a workstream. The base statuses are as follows:
  - Available
  - Busy
  - Busy-DND
  - Away
  - Offline

  Only the base statuses are available for selection in **Allowed Presences** while creating a work stream.

- **Presence text**: The text that is associated with a specific base status. This is the text that is visible to agents.

A default presence should be assigned to the agents that will be set when they sign in for work. If no default presence is assigned, the application will set "Available" as the default.

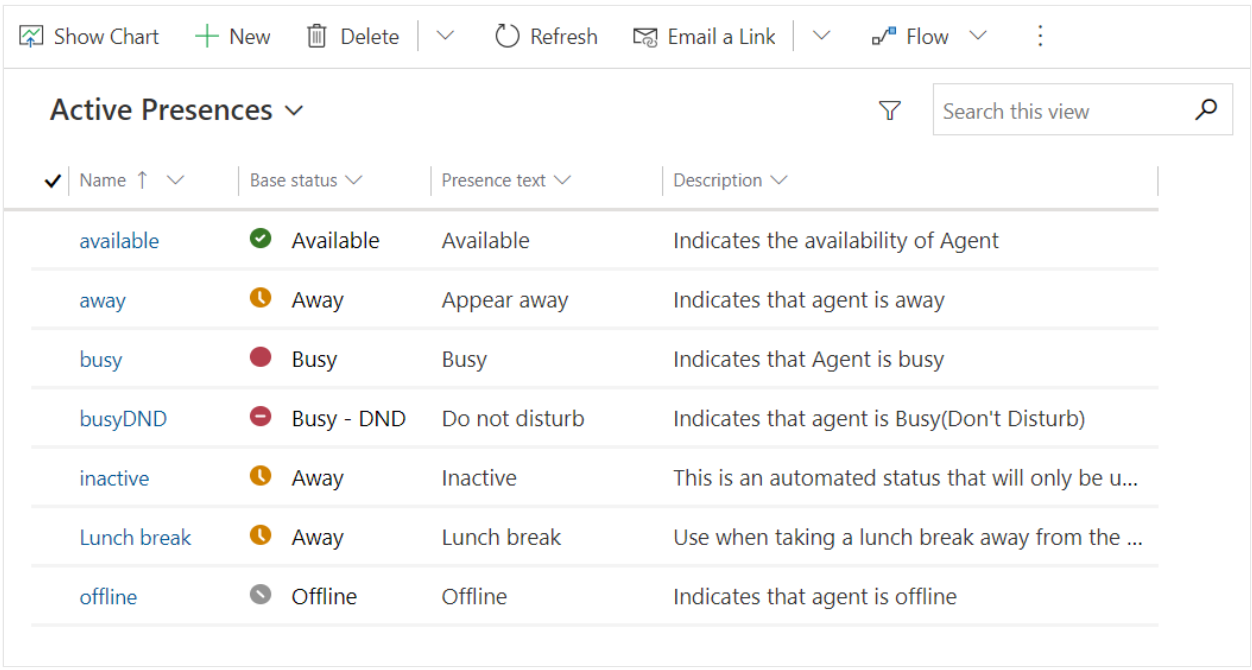
Out-of-the-box presence statuses

Omnichannel for Customer Service provides the following presence statuses out of the box:

- Available
- Away
- Busy

- Busy - DND
- Inactive
- Offline

The inactive presence is not available for manual selection by the agents; if the missed notifications feature is enabled, the agent status will be changed to inactive when agents do not respond to the incoming conversation request notification.



Name	Base status	Presence text	Description
available	Available	Available	Indicates the availability of Agent
away	Away	Appear away	Indicates that agent is away
busy	Busy	Busy	Indicates that Agent is busy
busyDND	Busy - DND	Do not disturb	Indicates that agent is Busy(Don't Disturb)
inactive	Away	Inactive	This is an automated status that will only be u...
Lunch break	Away	Lunch break	Use when taking a lunch break away from the ...
offline	Offline	Offline	Indicates that agent is offline

> **Note**
>
> You cannot edit or delete these out-of-the-box base and presence statuses.

Create custom presence status

In addition to the out-of-box presence statuses, admins can configure custom presence statuses for agents that must be mapped to a base presence. For example, if the agents on your team want to attend a training, you can create a custom **Away – In Training** presence status. When you map a custom presence to a base presence, make sure that the configurations are logically viable. For example, if you map an available custom presence to offline base status, the application will treat it as offline while the visual effect would be available.

To create a presence record

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

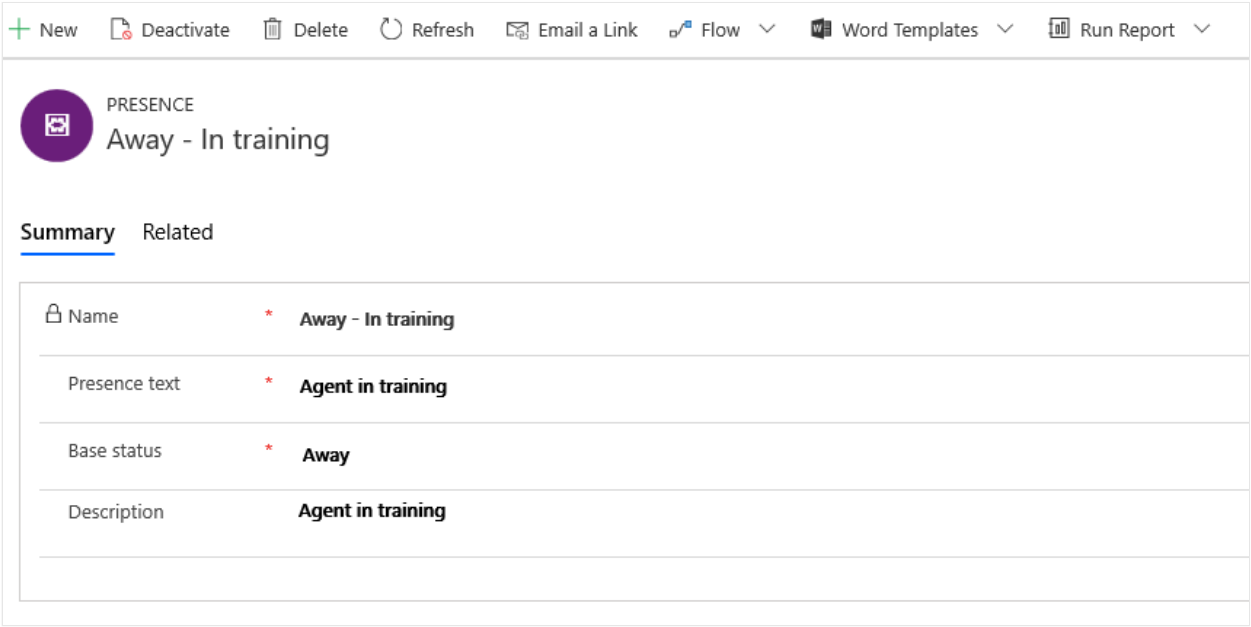
- In the site map, in **Agent experience**, select **Productivity**.

2. Select **Manage** for **Custom Presence**.

3. On the command bar, select **New** to create a presence record.

4. On the **Summary** tab, provide the following information:
   a. **Name**: Enter a name for the custom presence status.
   b. **Presence Text**: Enter presence text that should be associated with the new custom entity.
   c. **Base Status**: Select the most applicable base status in the list.
   d. **Description**: Enter a brief description of the custom presence record.

5. Select **Save**.



See also

Manage a user in Omnichannel for Customer Service
Understand and create workstreams
Overview of unified routing
Presence API
User presence isn't loading

Configure file attachment capability

Article • 07/24/2023

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

As an administrator, you can enable or disable the capability for your agents and customers to attach files during a conversation. When enabled, your customers and agents can send files and share more information about their issues. For example, if a customer receives an error while trying to complete a process, they can send the screenshots of the steps and error message to the agent.

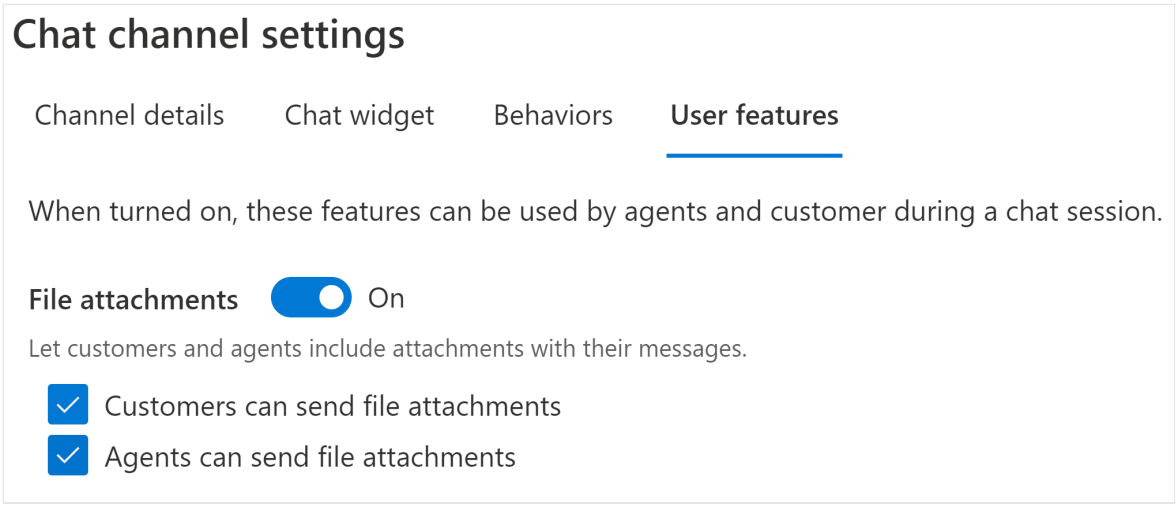
Customers must use the **Attach** icon to send files. The drag-and-drop operation is not supported in the live chat widget. For information about file attachment limitations, see Enable file attachments.

If an agent transfers the chat to another agent, the agent who receives the chat can also access the files attached in the conversation.

> **Note**
>
> In Unified Service Desk, if you sign in as an agent and want to attach a file while conversing with a customer, ensure that you select the required file type first and then attach the required file.

1. Sign in to Customer Service admin center.
2. In Customer support, go to **Channels** > **Chat**.
3. Edit the chat channel in which you need to configure the file attachment capability.
4. Go to the **User features** tab.
5. Set **File attachments** to **On**, and then select the check boxes for the following if they aren't selected:

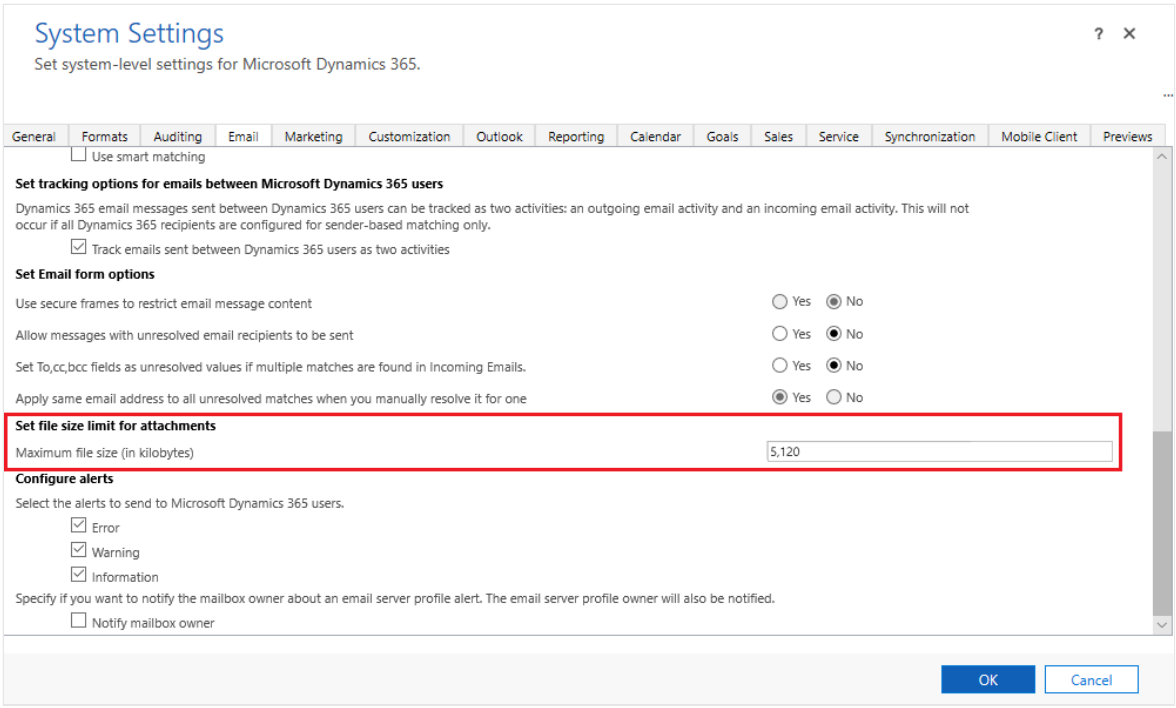
- **Customers can send file attachments**: Allows your customers to send a file to the customer service agent during a conversation.
- **Agents can send file attachments**: Allows your customer service agents to send a file to a customer during a conversation.



Set size limit, supported file types for file attachments

You can define the file size limit for attachments and unsupported file types in the advanced settings of Dynamics 365.

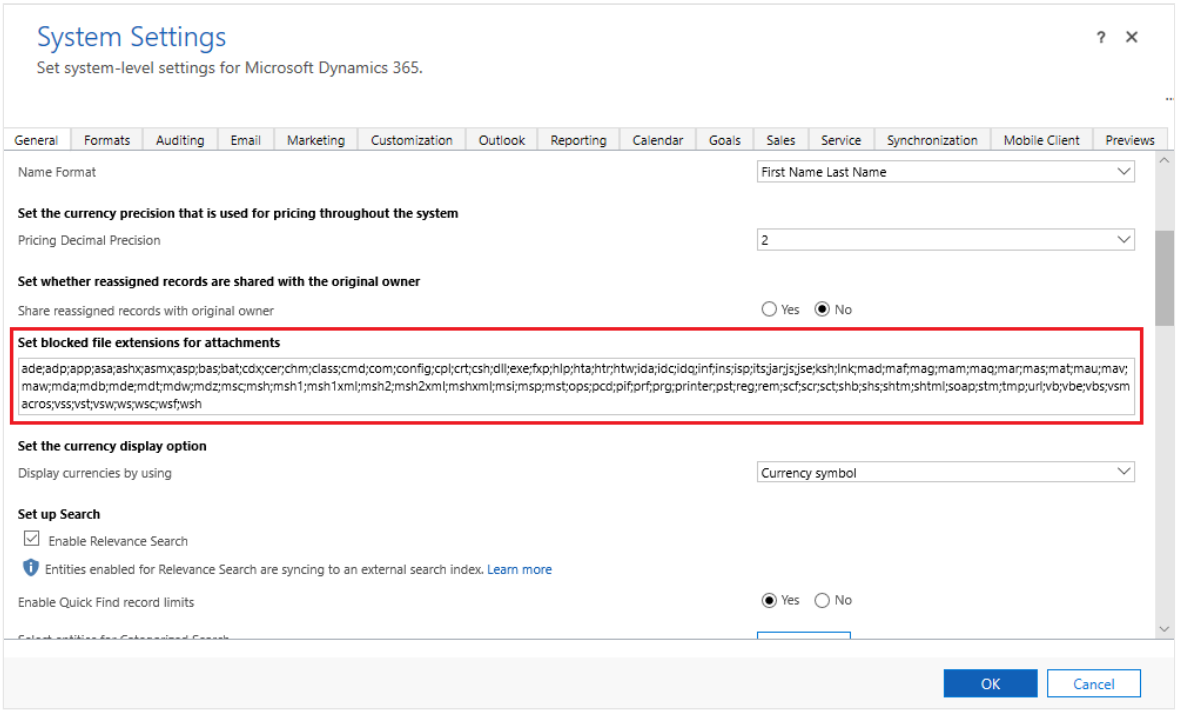
1. In the admin app, go to **Advanced Settings** on the top right, and then select **Settings** > **Administration** > **System Settings**.
2. In the **System Settings** window, go to the **Email** tab.
3. In the **Maximum file size (in kilobytes)** field, enter the value in kilobytes.



> **Note**
>
> By default, the size is set to 5 MB. You can specify up to 128 MB for all attachments. However, the maximum size for image files in live chat can be 20 MB only.

4. To specify unsupported file types, go to the **General** tab.

5. In the **Set blocked file extensions for attachments** field, add or edit the file types.



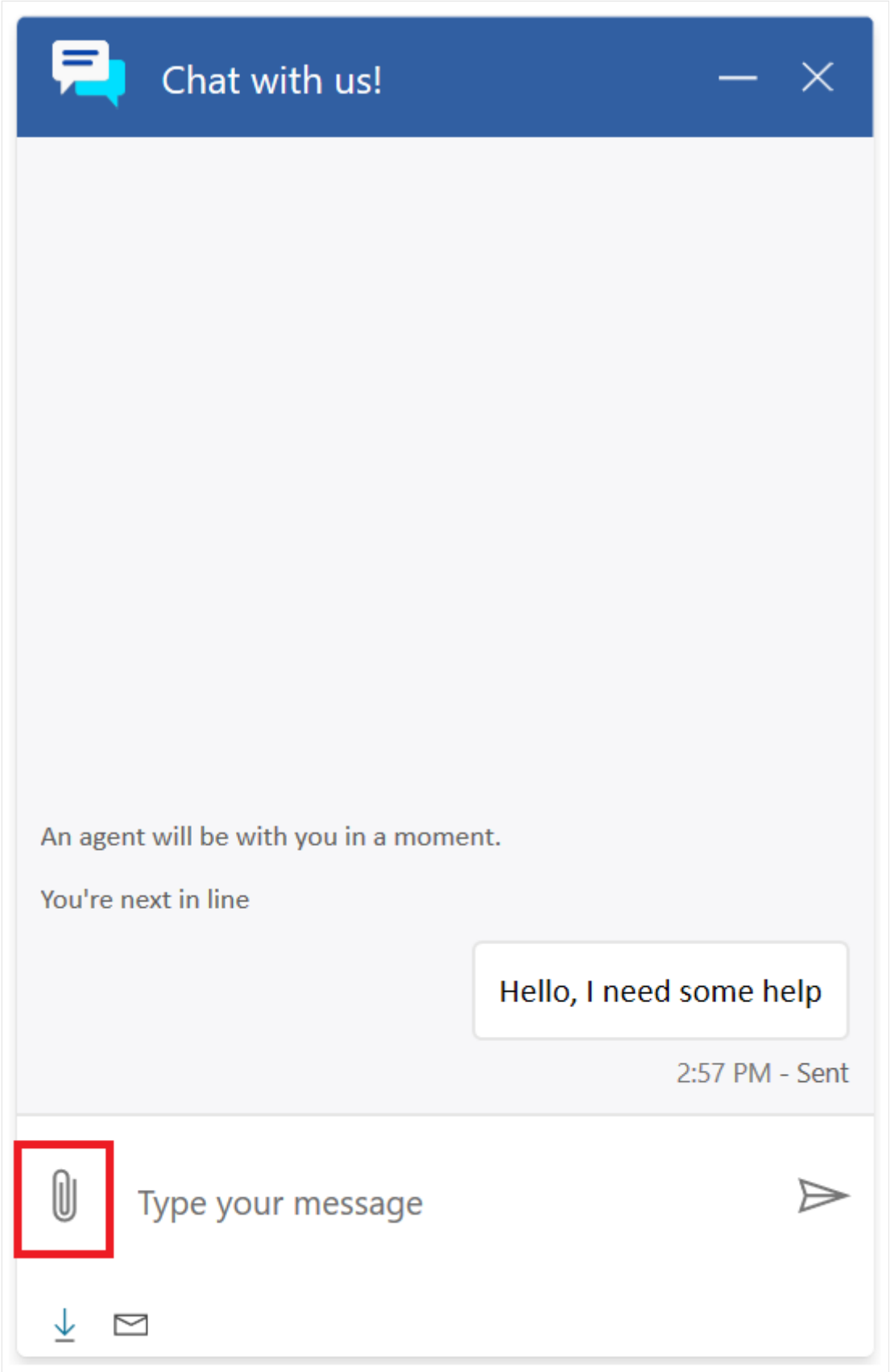
6. Select **OK**.

> **Note**
>
> Customers with Apple devices must have iOS version 13 to send file attachments.

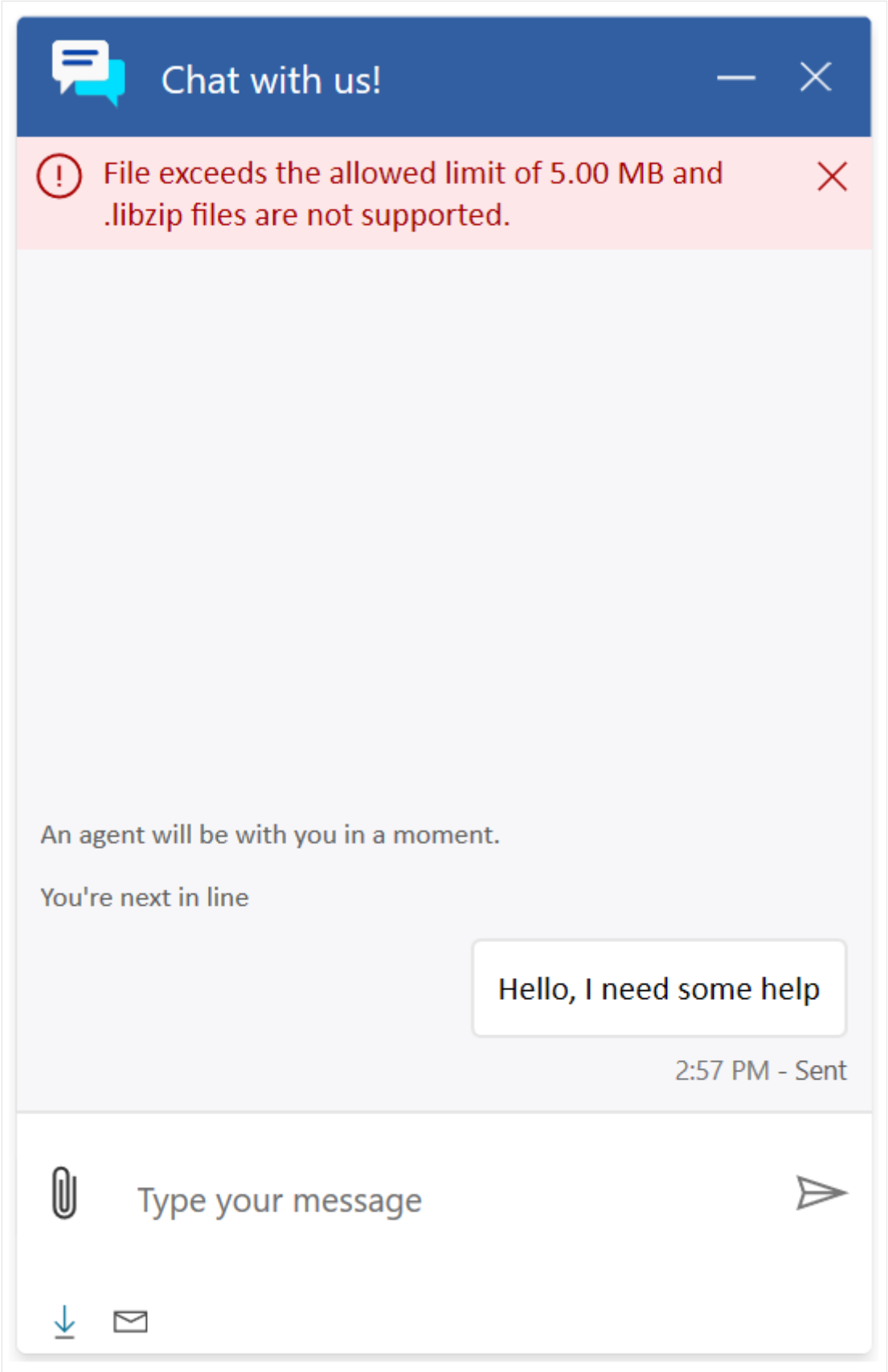
Customer experience of attaching a file

When the file attachment capability is enabled for customers, the attachment icon is displayed in the chat widget. A customer can then use the **Attach** icon to send files. The drag-and-drop operation is not supported.

When the conversation is going on, the file attachment is scanned and then uploaded. After the conversation ends, the attachment will be stored in the Annotations collection in Dataverse, which is an Azure BLOB-based entity. Customers can access attachments in transcripts by selecting the attachments, which are retrieved from the Dataverse entity.



If a customer tries to attach an unsupported file type or a file larger than the allowed size limit, the file won't be uploaded and a corresponding error message is displayed.



See also

Enable file attachments
Add a chat widget
Configure a pre-chat survey
Configure agent display name

Create quick replies

Create and manage operating hours

Create chat authentication settings

Embed chat widget in your website or portal

Enable file attachments

Article • 05/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can enable or disable the capability for your agents and customers to send file attachments during a conversation.

When you enable the option for customers in the **General settings** configuration of your channel, customers can include attachments with their messages. Similarly, when you enable the option for agents, agents can send attachments from the communication panel to the customers. Agents can upload files by dragging and dropping the file from the file explorer into the conversation canvas. Customers must use the **Attach** icon to upload files.

If an agent transfers the conversation to another agent, the agent who receives the chat can also access the files attached in the conversation.

For more information about the agent and customer experience of using file attachments in chat, see Configure file attachment.

For more information about which file types are supported in each channel, see Asynchronous channel support.

File size limit and unsupported extensions (types) for attachments

By default, Omnichannel for Customer Service has a file size limit of 5 megabytes (MB) (5,120 kilobytes). However, you can configure the file as per your organization's requirements.

> **Tip**
>
> Refer to documentation for your channel when determining message size limits. When you are enabling file attachments for Facebook messenger, we recommend

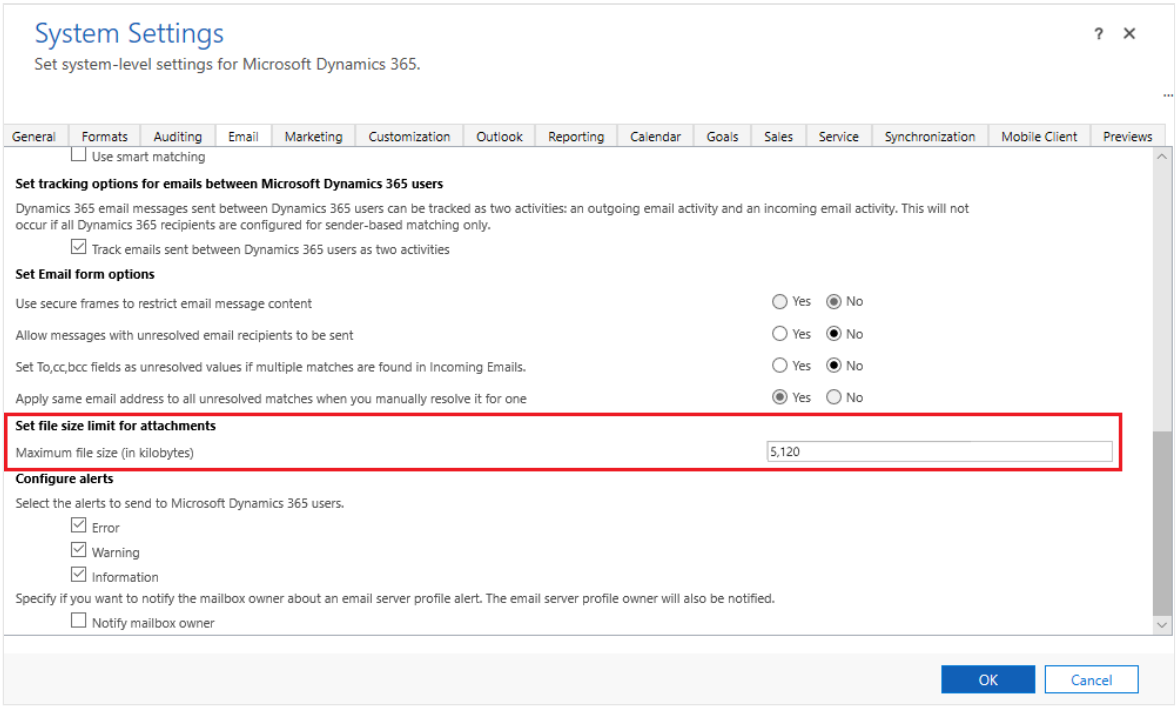
that you configure a maximum limit of 25 MB (25,600 kilobytes) because the Facebook messenger file size limit is 25 MB.

You can set the file extension types that customers and agents can share.

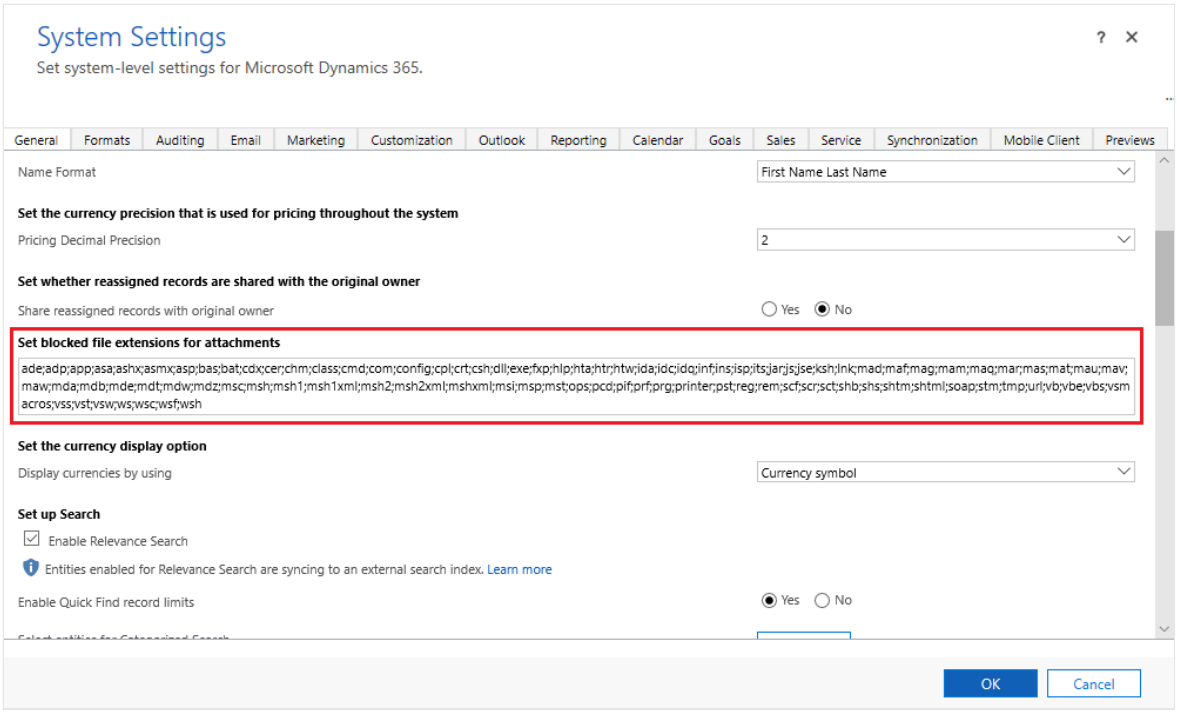
Configure file size limit and file extensions

To configure the file size limit and file extensions, follow these steps:

1. Sign in to Dynamics 365.
2. Select the settings icon in the nav bar, and then select **Advanced Settings**.
3. Go to **Settings** > **Administration** > **System Settings**.
4. In the **System Settings** window, go to the **Email** tab.
5. Go to the **Set file size limit for attachments** section, and in the **Maximum file size (in kilobytes)** field, enter the value in kilobytes.



6. To specify unsupported file types, go to the **General** tab.
7. In the **Set blocked file extensions for attachments** field, add or edit the file types.



8. Select **OK**.

Now, agents and customers can share file attachments during their conversation.

See also

Support for live chat and asynchronous channels
Configure file attachments
Configure a Facebook channel
Configure a WhatsApp channel
Configure a WeChat channel
Configure a LINE channel
Download file attachments from your Azure bot

Enable formatted messages

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Your agents can send and receive messages formatted using Markdown.

To enable your agents to send and receive formatted messages

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, in **Agent experience**, select **Productivity**.

2. For **Message formatting**, select **Manage**.
3. In the **Markdown settings** area under **Omnichannel Configuration**, set the **Turn on Markdown** toggle to **Yes**.
4. Select **Save & Close**.

Next steps

Markdown formats for agents

See also

Support for formatted messages
Markdown formats in custom channels that use Direct Line

Manage context variables

Article • 02/02/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Context variables enrich conversations with pre-conversation data, channel data, and custom context data. These attributes can then be used to define routing rules to route conversations to different queues. Context variables are also used in agent productivity tools like macros and agent scripts.

This article lists the considerations to use context variables and how you can create them.

Considerations

When you configure context variables, check for the following conditions:

- The context variable name must be less than or equal to 100 characters.
- The context variable value must be less than or equal to 4,000 characters.
- Use exact match to pass the value to the context variable because it is case-sensitive.
- Use the context variable names as defined and don't change them when you author flows in Azure or Power Virtual Agents bots.

We recommend that you don't update or delete the context variables after you create them. If you do need to update or delete the variables, make sure that they aren't used in any of the unified routing classification or assignment rules.

Add context variables

1. Go to one of the admin apps, and perform the following steps:

   Customer Service admin center

- In the site map, select **Workstreams** in **Customer support** and open a workstream from the list.

2. Select **Add context variable** in the **Advanced settings** section of a workstream.
3. In the **Edit** pane, select **Add**, and enter **Name**. Make sure that the variable name is less than or equal to 100 characters.
4. Select the **Type** of variable from the dropdown list. You can choose either **Text** or **Number**.
5. Repeat steps 3 and 4 to create the required variables.

Configure context variables for Azure and Power Virtual Agents bots

You can also configure context variables for Azure and Power Virtual Agents bots in Omnichannel for Customer Service. When customers initiate a conversation, the relevant context that's related to the customer, the issue they're facing, and recent activities performed by them can be made available for the bot to intelligently provide contextual responses to resolve customer issues in a quick and efficient manner. For example, the bot can use the signed-in user details to look up the recent case information or order history of the customer and provide a response. Similarly, the pre-conversation information, custom context, or recent pages browsed on a website by the customer can be passed on to the bot by configuring context variables for the bot. Context variables set by the bot can also be passed to Omnichannel for Customer Service when the bot escalates to the human agent. For example, you can pass the ticketnumber for the case created by the bot to Omnichannel for Customer Service to link the case and load the customer summary for the agent to view.

To configure context variables for bots, see Configure context variables for bots. But, before you configure context variables for bots, we recommend that you read the best practices for configuring bots. More information: Best practices for configuring bots

To learn about using and sending custom context in a conversation, see Send custom context.

See also

Integrate a Power Virtual Agents bot
Integrate an Azure bot
Configure context variables for bots
Configure bots to escalate and end conversations
Best practices for configuring bots

Configure a pre-conversation survey

Article • 10/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Configure a pre-conversation survey

For the chat channel, you can configure a survey that users can respond to when they access the widget to start a conversation.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, select **Workstreams** in **Customer support**.

2. Select the workstream for the chat channel in which you want to configure the pre-conversation survey.

3. On the page that appears, select the channel instance from the dropdown list, and then select **Edit**.

4. On the **Chat channel settings** dialog, go to the **Behaviors** tab, and set the toggle for **Pre-conversation survey** to **On**.

5. In the **Survey questions** area, select **Add**, and then enter the following details on the **Survey question** page:

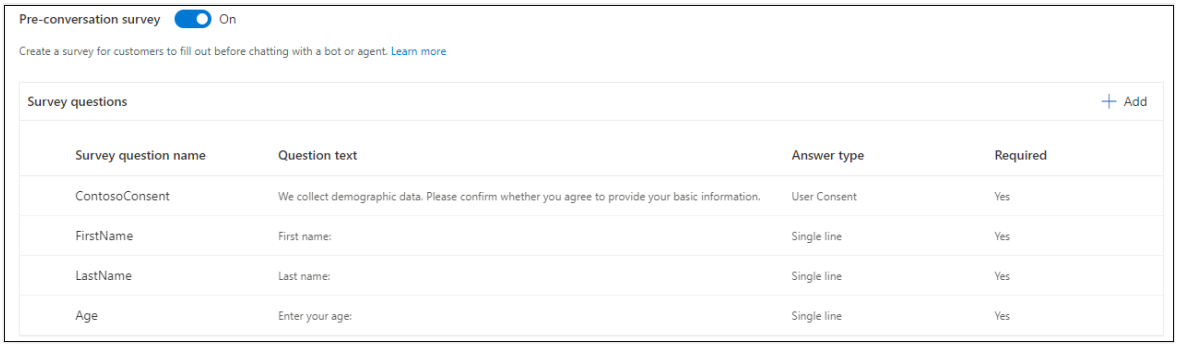
   - **Survey question name**: Specify a name that's used internally.
   - **Question text**: Enter the question text. The text appears as a question to the user at runtime. The length of each question must be less than or equal to 512 characters.
   - **Answer type**: Select one of the following values from the list:
     - **Single line**: The user can enter a single line of text.
     - **Multiple lines**: The user can enter multiple lines of text.

    - **Option set**: The user can select an option in a drop-down list. You must enter options separated by a semicolon.
    - **User consent**: Use this option to request user consent for the pre-chat survey. You can provide a link to a webpage, such as the privacy policy page. Links must be in the following format: [link text](link to the webpage). A checkbox appears beside the question text in the pre-conversation survey.
- **Required**: Set the toggle to **Yes** if the response to the question needs to be mandatory. If the answer type is **User Consent**, make sure you specify **Yes**.

> ⓘ Note
>
> - Validations in pre-conversation surveys are supported for mandatory fields only.
> - After you add the survey questions, corresponding context variables are created and displayed in the **Advanced settings** > **Context variables** section of the workstream.

6. Select **Confirm**. The survey question with its details is listed in the **Survey questions** area.

7. Repeat the steps pertaining to creating questions. You can add up to five questions only.



8. Optionally, you can change the order in which the questions are listed.

Configure a pre-conversation survey in Omnichannel Administration

> ⓘ Important
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service

admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

You can configure your chat widget to show users a survey that they must respond to before they start the conversation.

1. Sign in to Omnichannel Administration.
2. Go to **Channels** > **Chat**.
3. Open the chat widget in which you want to configure a pre-chat survey, and select **Surveys**.
4. In the **Pre-conversation survey** area, set the **Turn on** toggle to **Yes**. The options to add questions and refresh the page appear.
5. Select **Add question**.

   > ⓘ **Note**
   >
   > - You can add only five questions to a pre-conversation survey. The length of each question should be less than or equal to 512 characters.
   > - When you add a question to the pre-conversation survey, a corresponding context variable is created and is displayed in the **Advanced settings** > **Context variables** section.

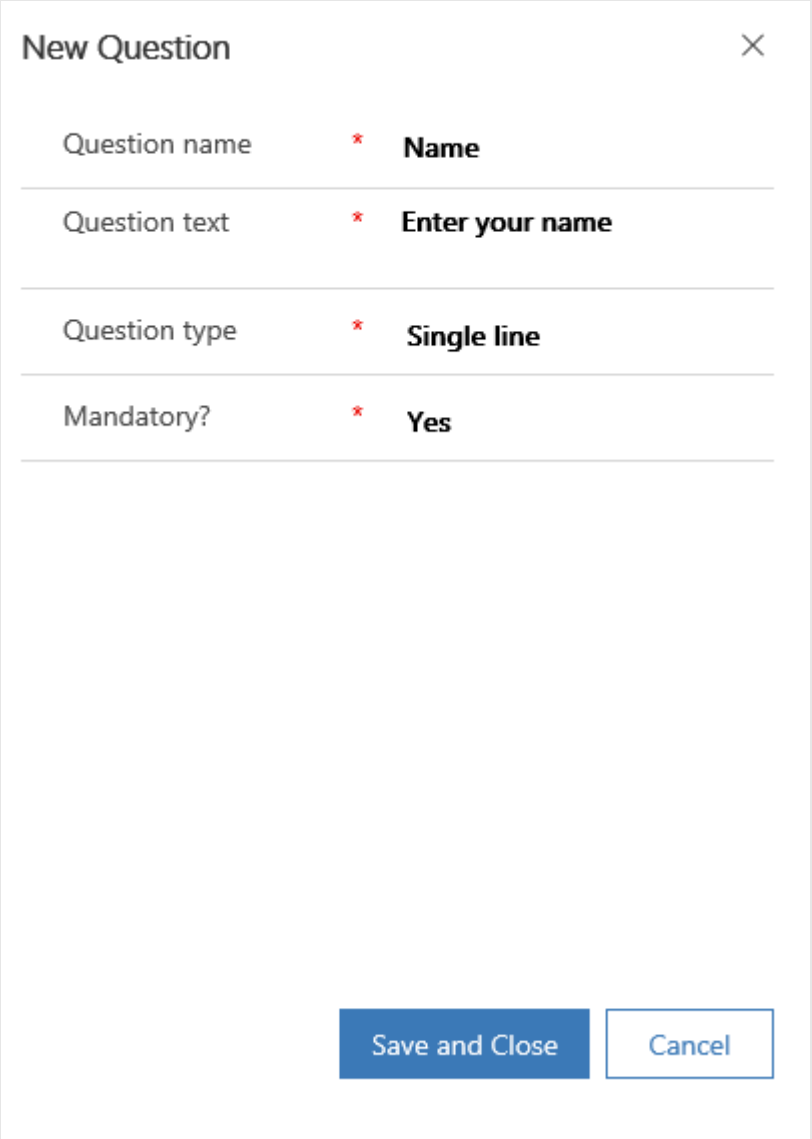
6. In the **New Question** pane, provide the following information:

   - **Question name**: Enter a name for the question.
   - **Question text**: Enter the text of the question.
   - **Question type**: Select one of the following options to indicate how users can respond:
     - **Single line**: The user can enter a single line of text.
     - **Multiple lines**: The user can enter multiple lines of text.
     - **Option set**: The user can select an option in a drop-down list. You must enter options separated by a semicolon.
     - **User consent**: Use this option to request user consent for the pre-chat survey. You can provide a link to a webpage, such as the privacy policy page. Links must be in the following format: [link text](link to the

webpage). A checkbox appears for the question text in the pre-conversation survey.

- **Mandatory**: Select **Yes** or **No** to indicate whether the question is mandatory. If question type is **User Consent**, make sure you specify **Yes**.

> **Note**
>
> Validations in pre-conversation surveys are available for mandatory fields only.

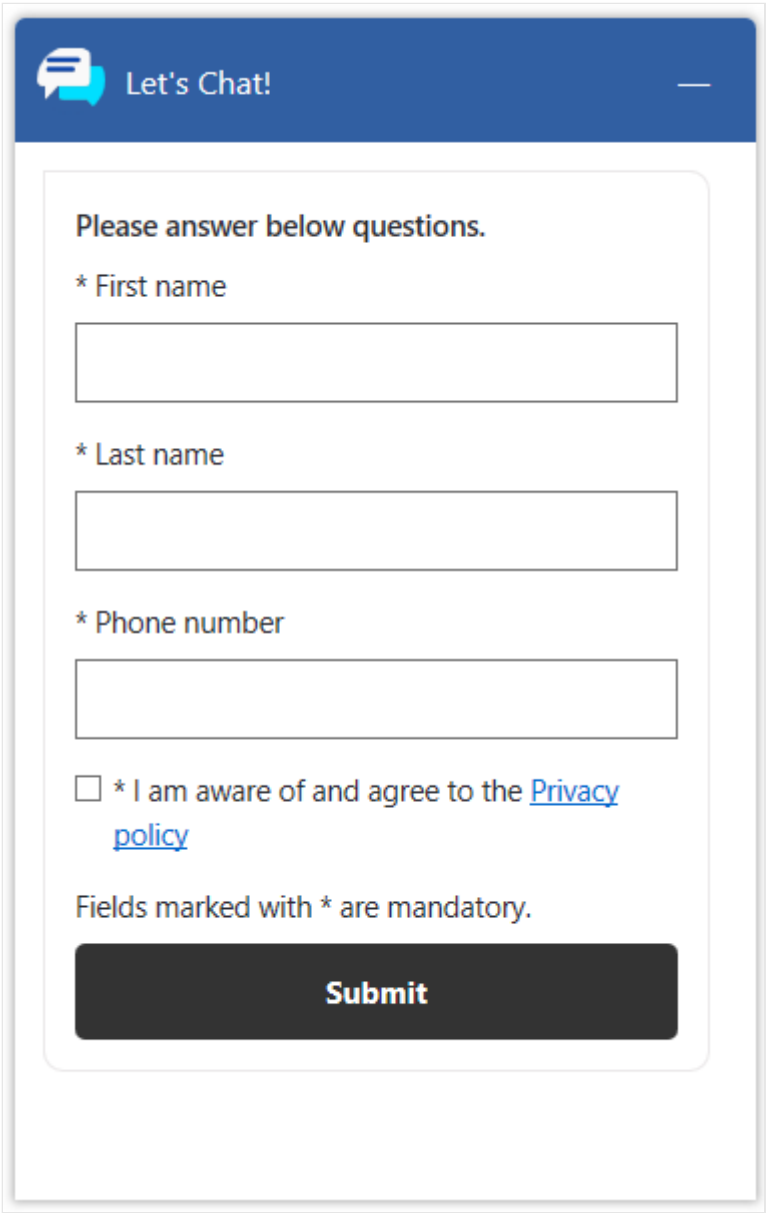


7. Select **Save and Close**. The questions are added in the **Pre-chat unauthenticated questions** area.

8. Optionally, select a question and select **Move up** or **Move down** in the right corner to change its order.

Runtime view of survey questions

The following screenshot is a sample of the pre-conversation survey that will be displayed for customers.



More information: Automatically identify customers using pre-chat responses

See also

Add a chat widget
Configure agent display name
Configure file attachment capability
Create quick replies
Create and manage operating hours
Create chat authentication settings
Embed chat widget in your website or portal

Configure a post-conversation survey

Article • 03/08/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can configure your chat widget to show users a survey that they can respond to after they finish a conversation.

> **Note**
>
> Post-conversation surveys are not supported in Government Community Cloud.

How post-conversation surveys work

When you enable a post-conversation survey for a channel, the survey will appear for the customer after the agent or customer ends the conversation. While configuring the survey, you can use the settings for the response options available in Dynamics 365 Customer Voice. More information: Work with survey settings

The post-conversation works as follows:

1. Create a survey in Dynamics 365 Customer Voice
2. Configure a survey
3. Experience the runtime behavior

You can enable post-conversation surveys for the following channels:

- Live chat
- SMS for Twilio, SMS for TeleSign
- Facebook
- LINE
- Twitter
- WeChat
- WhatsApp
- Custom channel

- Microsoft Teams
- Apple Messages for Business
- Google's Business Messages

For the Live chat channel only, you can configure the survey link or survey questions to be displayed in the chat window.

Prerequisite

The post-conversation survey uses Dynamics 365 Customer Voice to create surveys. Make sure that you have access to create surveys in Dynamics 365 Customer Voice in the same org as Omnichannel for Customer Service, and you've created the required survey. The survey that you create will be listed as an option to choose for linking to the conversation. More information: Create surveys with Dynamics 365 Customer Voice

Configure the post-conversation survey

In the Customer Service admin center or Omnichannel admin center, you can set up surveys when configuring a channel or update an existing channel instance that is already configured.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, select **Workstreams** in **Customer support**.

2. Select the channel instance, and then select **Edit**.

3. On the **Behaviors** tab, set the toggle for **Post-conversation survey** to **On**.

4. In **Dynamics 365 Customer Voice survey**, search for the survey you want to configure, and select it.

   - Optionally, if you want to create a survey, select **Create Dynamics 365 Customer Voice**. The Dynamics 365 Customer Voice page opens on a new tab, where you'll perform the steps to create a survey. After you create the survey, it will be available for selection in the **Dynamics 365 Customer Voice survey** box in the **Post-conversation survey** area.

5. In the **How should we send the survey** box, the following options are available depending on the channel you select:

    - **Send survey link to conversation:** At runtime, the survey link is sent to the customers.
        - In the **Message** box that appears, select the default message text or type a custom message. The personalized survey link will be appended to the message and displayed to the customer.

    - **Insert survey in conversation:** At runtime, the agent can insert a survey link in an active conversation that results in the survey questions being displayed on the customer chat window. This option is available only for the Live chat channel.

6. Select the **Bot conversation survey** checkbox to share surveys for conversations that are handled by bots.

    By default, the **Use same survey settings as above** checkbox is selected.

7. If you want to use different survey settings for the conversations handled by bots, repeat steps 4 and 5.

8. Select **Save and close**.

Runtime experience of post-conversation surveys

If the post-conversation survey is enabled for a conversation, after the conversation ends, the pre-designed survey is shared with the customer. This survey allows you to keep a track of the customer feedback for the service provided. Any conversation can be considered as closed when one of the following scenarios happen:

- Agent closes the chat conversation.
- Customer closes the chat conversation.
- System closes the chat conversation after a pre-defined time.

For Live chat conversations, customers can receive survey questions within the same conversation or through a link that takes them to an external site. For SMS and social channels, a survey link is shared.

> ⓘ **Note**

The surveys that you create and the survey data that's processed are not hosted or stored in Omnichannel for Customer Service.

Configure the survey in Omnichannel Administration

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

1. Go to **Channels**, and select a channel for which you want to configure a post-conversation survey.
2. On the page that appears, select the channel instance in which you want to configure the survey.
3. Go to the **Surveys** tab.

   > **Note**
   >
   > The navigation to the **Surveys** tab varies for every channel. For example, for the Facebook channel, surveys can be configured at the page level.

4. In the **Post-conversation survey** area, set the toggle for **Turn on** to **Yes**.
5. In **Dynamics 365 Customer Voice survey**, search for a survey and select it.
6. Optionally, if you want to create a survey, select **Open Dynamics 365 Customer Voice**. The Dynamics 365 Customer Voice page opens on a new tab. After you create the survey, it will be available for selection in the **Dynamics 365 Customer Voice survey** box in the **Post-conversation survey** area.
7. In the **How should we send the survey** box, the following options are available depending on the channel you select:

   - **Send survey link to conversation:** At runtime, the survey link is sent to the customers.
     - In the **Message** box that appears, select the default message text or type a custom message. The personalized survey link will be appended to the

message and displayed to the customer.

- **Insert survey in conversation:** At runtime, the agent can insert a survey link in an active conversation that results in the survey questions being displayed on the customer chat window. This option is available only for the Live chat channel.

8. Select **Save**.

See also

Add a chat widget
Channels

Identify customers automatically

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can assist customers better if you can automatically identify them and view their account and case details on the **Active Conversation** page. One of the ways is by setting up pre-conversation questions in the relevant chat widgets. Customer responses can be used to search for details in the records and display the results. For an account or contact, the search is performed on the **Name**, **Email**, or **Phone Number** fields. For an account, the **Phone Number** pertains to the **Phone** field of the **Account Summary** page; for a contact, the **Phone Number** pertains to the **Mobile Number** field of the **Contact Summary** page. For cases, the search is performed on the **Case Number** field.

> **Note**
>
> The record search identifies records that have an active status code for contacts or accounts; if you use custom status codes, then record identification won't work.

For every incoming conversation request that an agent receives, a notification appears that includes contextual information for the request and customer details, if available. After the agent accepts the incoming notification, the **Active Conversation** page opens and shows the details of the identified customer and case. If the identified contact or account has one active case linked to it, then case will be automatically linked to the conversation. If the customer has reached out for a different case, the agent can manually change the linked case.

You can identify incoming voice calls out of the box if the incoming phone number matches with the phone number specified for a contact in the mobile phone field or account phone field. If you want to use other phone number fields like home phone for customer identification, then contact Microsoft Support.

If more than one account, contact, or case is identified, the record won't be linked to the conversation. More information: View Active Conversation for an incoming engagement request

Set up pre-conversation questions

Use the following question names to create pre-conversation questions. To know how to create pre-conversation questions and use them in a pre-conversation survey, see Configure a pre-conversation survey.

Entity	Mapping	Answer type
Account	Question context key: Name Attribute logical name: name Question context key: Email Attribute logical name: emailaddress1 Question context key: Phone Attribute logical name: telephone1 (**Phone** field on the **Account Summary** page)	Single line
Contact	Question context key: Name Attribute logical name: fullname Question context key: Email Attribute logical name: emailaddress1 Question context key: Phone Attribute logical name: telephone1 (**Mobile Phone** field on the **Contact Summary** page)	Single line
Incident	Question context key: CaseNumber Attribute logical name: ticketnumber	Single line

> **Note**
>
> If you'd like other fields to be recognized for phone number lookup, contact **Microsoft Support**.

Use the setContextProvider API method

You can automatically identify records using custom context set using the setContextProvider API apart from pre-conversation answers. To programmatically set these values, see Manage custom context.

Link customer and case to conversations when bot escalates or ends conversations

When a bot ends a customer conversation, the bot can link the case number to the conversation. The bot can create a new case number or obtain an existing one from the customer based on the customer name, email address, or telephone number.

If the bot needs to escalate the conversation to a human agent, then bot can link the customer and case number to the conversation so that when the human agent accepts the escalation request, all relevant information is available to the agent in the **Active Conversation** section. The escalation summary gives the human agent the background information about the escalation and enables quicker resolution of the customer issue.

To link the customer or case, set the values for the associated attributes, such as customer name and phone number. These attributes will be searched in the corresponding entities such as customer and case, and the result will be linked to the conversation if a single matching record is found. The bot will need to set context parameters for the following that are also set when the customer is automatically identified when the conversation is transferred.

Entity to be linked	Variable name to be set by bot	Attribute for Dynamics 365 entity to match with corresponding variable name in bot
Account	• Name • Email • Phone	• name • emailaddress1 • telephone1
Contact	• Name • Email • Phone	• name • emailaddress1 • telephone1
Case	CaseNumber	ticketnumber

For information about creating context variables for Azure and Power Virtual Agents bots, see Configure context variables for the bot.

See also

Create and manage workstreams
Configure a Power Virtual Agents bot

Configure Azure bot

Context variables for bots

Close conversations automatically

Article • 10/04/2023

Omnichannel for Customer Service has a default time set for the conversation to close automatically. That is, if a conversation in a certain stage remains in the stage for more than the default time, then the conversation is moved to the closed state. Conversations achieve closure, allowing agents to focus on other tasks, enhancing productivity.

The Omnichannel for Customer Service scheduler checks conversations every 5 minutes to identify conversations that don't transition for more than the default configured time. Such conversations become eligible for automatic closure, so the next time the scheduler runs, the conversations are moved from the existing state to the **Closed** state.

> **Important**
>
> - To avoid inaccurate statuses, we recommend that you don't change the conversation state and status reason by manually updating the records in Microsoft Dataverse.
> - For any actions performed on the conversations such as monitor, consult, or transfer, the scheduler will automatically recalculate the time to close the conversation.

Default time for automatic closure of conversations

All channels have different default configured time after which conversations can be moved to the **Closed** state. However, the exact time at which the scheduler runs is dependent on the Omnichannel for Customer Service deployment time in your region. For more information, contact Microsoft Support.

The following table describes the channel, status reason, and default configured time.

Channel	Existing status reason	Default configured time	Description
Chat	Open	20 min	For a chat channel, a conversation in the **Open** state for more than 20 minutes is eligible for automatic closure. Next time, when the scheduler runs, the conversation will be moved from the **Open** state to the **Closed** state.

Channel	Existing status reason	Default configured time	Description
Chat	Active	None	For a chat channel, a conversation in the Active state won't be automatically closed.
Chat	Wrap-up	15 minutes	For a chat channel, a conversation that is in the **Wrap-up** stage for more than 15 minutes is eligible for automatic closure. Next time, when the scheduler runs, the conversation will be moved from **Wrap-up** to the **Closed** state.
Records (Case)	Open	None	For a records (case) channel, a conversation that's **Open** will be closed if the corresponding record is deleted.
Records (Case)	Active	None	For a records (case) channel, a conversation that's **Active** will be closed if the corresponding record is deleted.
Voice	Open	30 days	The conversation is eligible for automatic closure after the default time, 30 days, elapses. The conversation is moved from the **Open** to **Closed** state when the scheduler runs after the elapsed time.
Voice	Active	2 hours	The conversation is eligible for automatic closure after the default time, 2 hours, elapses. The conversation is moved from the **Active** to **Wrap-up** state when the scheduler runs after the elapsed time.
Voice	Wrap-up	1 day	The conversation is eligible for automatic closure after the default time, 1 day, elapses. The conversation is moved from the **Wrap-up** to **Closed** state when the scheduler runs after the elapsed time.
SMS, Teams, persistent chat, and social	Open	30 days	In an asynchronous channel—such as SMS, Teams, persistent chat, or a social channel—a conversation that has been in the **Open** state for more than 30 days is eligible for automatic closure. Next time, when the scheduler runs, the conversation will be moved from the **Open** state to the **Closed** state.
SMS, Teams, and social	Active	30 days	In an asynchronous channel—such as SMS, Teams, or a social channel—a conversation that has been in

Channel	Existing status reason	Default configured time	Description
			the **Active** state for more than 30 days is eligible for automatic closure. Next time, when the scheduler runs, the conversation will be moved from **Active** to the **Closed** state.
SMS, Teams, persistent chat, and social	Wrap-up	One day	In an asynchronous channel—such as SMS, Teams, persistent chat, or a social channel—a conversation that has been in the **Wrap-up** state for more than one day is eligible for automatic closure. Next time, when the scheduler runs, the conversation will be moved from **Wrap-up** to the **Closed** state.

Conversation in waiting

A conversation in **Waiting** is moved to the **Closed** state when the conversation is inactive for a specified time. The inactive time can be set in the workstream for the **Auto-close after inactivity** option, based on which the conversation will be moved to the closed state after the criteria is met.

For example, when you set **Auto-close after inactivity** to 5 minutes, the conversation is moved to the **Closed** state if it has been in **Waiting** for more than 5 minutes.

> **Note**
>
> The **Auto-close after inactivity** option is available for persistent chat, SMS, social, and Microsoft Teams channels only.

To learn more, see Create a workstream.

Close conversations using Power Apps

You can configure the auto-close duration of a conversation in Power Apps by performing the following steps:

1. In Power Apps, select the environment that contains your solution.
2. Select **Tables**, and then select **Channel State Configuration** table.
3. Select **Edit**, and in **Auto close conversation after** column, set the auto-close duration.

Close conversations using API

Programmatically, you can change the default time and set it as per your organization's requirements using the Web APIs. To learn more, see Configure automatic closure of conversations using web API.

See also

Understand conversation states

Configure authentication settings

Article • 04/06/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

You can create authentication settings to validate a signed-in customer from a domain, and extract information based on the context variables that are defined. You can differentiate your anonymous customers from authenticated customers, and you can create rules based on the context variables.

For example, you can have separate queues for anonymous customers and authenticated customers. Because you have more information about your authenticated customers, you can also prioritize them based on specific variables, such as a shopping cart value or a privileged status.

After you create an authentication settings record, you must add it to a channel instance within a workstream's channel setup to make it work. Authentication is supported for these channels:

- Chat
- Apple Messages for Business

The agent will get a notification in the **Conversation summary** section whether the customer is authenticated or not. The **Authenticated** field is set to **Yes** or **No** based on the authentication of the customer. More information: Conversation summary

Prerequisites

- Make sure your organization has working knowledge of OAuth 2.0 and JSON Web Tokens (JWTs).
- Verify that you have permissions on the secure columns. More information: Configure permissions to access secure columns

Create an authentication setting record for chat

You can create a chat authentication setting record in the admin app.

1. Go to one of the admin apps, and perform the following steps.

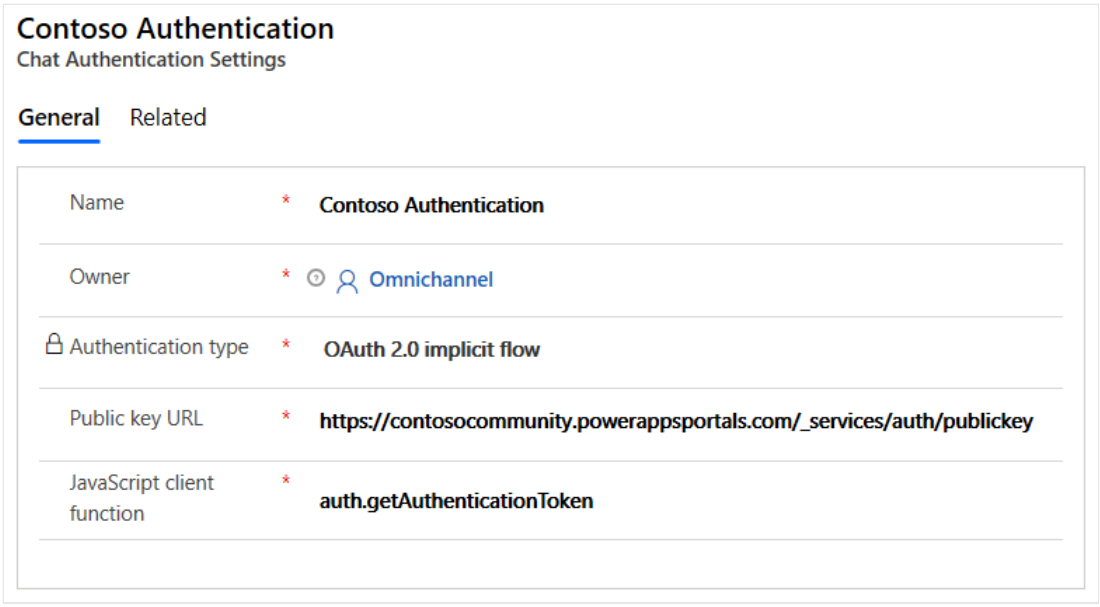
   Customer Service admin center

   a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
   b. In the **Authentication settings** section, select **Manage**.

   The **Authentication settings** page is displayed.

2. Select **New Authentication Settings**, and provide the following information on the **Add authentication setting** page:

   - **Name**: Enter a name for the authentication setting.
   - **Owner:** Accept the default value or change to a required value.
   - **Authentication type:** By default, it's OAuth 2.0 implicit flow that can't be edited.
   - **Public key URL**: Specify the public key URL of the domain. This URL is used to validate the information that comes in from the JavaScript Object Notation (JSON) Web Token (JWT) of the domain that a customer has signed in to.
   - **JavaScript client function**: Specify the JavaScript client function to use for authentication. This function extracts a token from the token endpoint.



For more information about how to find the public key URL and JavaScript client function, see the Setup for Power Apps portals or Setup for custom portals section later in this article.

3. Select **Save**.

Add authentication to chat widget

1. Open the chat widget to which you want to add authentication and do one of the following steps:

   - In Customer Service admin center or Omnichannel admin center, go to the **Behaviors** tab.
   - In Omnichannel Administration, go to the **Basic details** tab.

2. In the **Authentication settings** box, browse and select the chat authentication record.

When a signed-in customer on a portal opens the chat widget, the JavaScript client function passes the JWT from the client to the server. The JWT is decrypted and validated by using the public key, and the information is then passed to the chat agent in Omnichannel for Customer Service. As an admin, you can also pass additional information about the signed-in customer in the JWT by defining custom context variables. The context variables must be defined exactly as they're defined in the workstream that's associated with the chat widget. More information: Manage context variables

Setup for Power Apps portals

If you're adding authentication for a chat widget on a website developed using Power Apps portals, then the public key URL and JavaScript client function are available out of the box. You'll need to upload a custom certificate to have a valid public key URL on Power Apps portals.

- **Public key URL**: `<portal_base_URL>/_services/auth/publickey`
- **JavaScript client function**: `auth.getAuthenticationToken`

The Power Apps portal will try to automatically link a contact record to the conversation through the context passed in its JavaScript client function.

Setup for custom portals

If you're adding an authenticated chat experience to a custom website that isn't developed using Power Apps portals, your web development team must perform the following steps before your administrators can configure authenticated chat:

1. Generate a public/private key pair in their authentication servers. The keys must be generated using the RSA256 algorithm.

   Here's sample code for generating private/public key pairs.

   Powershell

   ```
   openssl genpkey -algorithm RSA -out private_key.pem -pkeyopt
   rsa_keygen_bits:2048
   openssl rsa -pubout -in private_key.pem -out public_key.pem
   ```

2. Create an endpoint that will return your public keys. The Omnichannel servers will use the public keys to validate the JWT token passed as a part of authorizing the chat request. The URL of this endpoint will be entered into the admin app when creating an authentication setting record.

   Your public key endpoint will look similar to this example:

   ```
   -----BEGIN PUBLIC KEY-----
   NIIBIjANBgkqhkiG9w0BAQEFABCOPQ8AMIIBCgKCAQEAn+BjbrY5yhSpLjcV3seP
   mNvAvtQ/zLwkjCbpc8c0xVUOzEdH8tq4fPi/X5P/Uf2CJomWjdOf1wffmOZjFasx
   ELG+poTqy5uX2dNhH6lOMUsV31QGG36skLivpLBCSK6lWlzsV6WGkb/m8r86aGzp
   jtNhw8yvoTYB4updDrJ8pC+tx4EWK0WEmKn1GsW6TjUtxJjcTLI1puSbmcGHbkSi
   RSbWkKPqaEVFALprw+W5ZCung5QX3KOkY/rJd+2JwULm7okyQCQaF7qwa5i9Uf65
   7M6ZL4vsDevq7E/v3tf6qxpSSHzt4XspXVQty9QHhqDqBEY3PfI4L2JjgIGuPhfS
   YQIDAQAB
   ```

```
    -----END PUBLIC KEY-----
```

If you need to use multiple public keys, your public key endpoint can return a set of `<kid, publickey>` pairs, where `kid` refers to the key ID. Key ID pairs must be unique. The kid will need to be passed in the JWT token in step 4. If you're using multiple keys, your public key endpoint should return something that looks like this. The public key is base64-encoded.

```
 [
      {
          "kid": "qWO4EaKT1xRO7JC/oqALz6DCVr41B/qL0Hqp4in7hu4=",
          "publicKey":
LS0tLS1CRUdJTiBQVUJMSUMgS0VZLS0tLS0NCk1JSUJJakFOQmdrcWhraUc5dzBCQVFFRkFBT0NB
UThBTUlJQkNnS0NBUUVBbjFLdXhtSEh3V3hjelZSWGRBVmMNCnBEaFZwa0FnYklhTGZBUWc1bFpv
emZqc29vcWRGWkl0VlFMdmRERWFVeDNqTytrTkxZM0JFRnBYVDZTN3ZNZCsNCnZoM2hpMDNsQ1dI
NnNCTWtaSWtuUUliMnFpekFsT0diU2EvK3JrUElnYnpXQjRpT1QyWVhyOVB4bXR5d2o4WUINCnYr
am55VU5DSzMyZy9FYWsvM0k3YW1vZ2pJY0JISjNFTjVuQWJBMExVVnJwMW5DODJmeEVPOHNJTzNY
djlWNVUNCnc5QnVTVVFRSmtMejNQYVI5WTdRZUEyNW5LUGtqTXZ2Y0UxVU5oeVpIYlNLbmorSitk
ZmFjb1hsSGtyMEdGTXYNCldkSDZqR0pWcGNQMHBkNjFOa3JKa2c0aStheThwS2ZqdjNUOHN3NWda
VHFweFFaaitVRWxqaVM0SHRPTlhkNlENCnZRSURBUUFCDQotLS0tLUVORCBQVUJMSUMgS0VZLS0t
LS0NCg==",
          "expiry": 1608495423
      },
 {
          "kid": "qWO4EaKT1xRO7JC/oqALz6DCVr41B/qL0Hqp__valid=",
          "publicKey":
"LS0tLS1CRUdJTiBQVUJMSUMgS0VZLS0tLS0NCk1JSUJJakFOQmdrcWhraUc5dzBCQVFFRkFBT0N
BUThBTUlJQkNnS0NBUUVBbjFLdXhtSEh3V3hjelZSWGRBVmMNCnBEaFZwa0FnYklhTGZBUWc1bFp
vemZqc29vcWRGWkl0VlFMdmRERWFVeDNqTytrTkxZM0JFRnBYVDZTN3ZNZCsNCnZoM2hpMDNsQ1d
INnNCTWtaSWtuUUliMnFpekFsT0diU2EvK3JrUElnYnpXQjRpT1QyWVhyOVB4bXR5d2o4WUINCnY
ram55VU5DSzMyZy9FYWsvM0k3YW1vZ2pJY0JISjNFTjVuQWJBMExVVnJwMW5DODJmeEVPOHNJTzN
YdjlWNVUNCnc5QnVTVVFRSmtMejNQYVI5WTdRZUEyNW5LUGtqTXZ2Y0UxVU5oeVpIYlNLbmorSit
kZmFjb1hsSGtyMEdGTXYNCldkSDZqR0pWcGNQMHBkNjFOa3JKa2c0aStheThwS2ZqdjNUOHN3NWd
aVHFweFFaaitVRWxqaVM0SHRPTlhkNlENCnZRSURBUUFCDQotLS0tLUVORCBQVUJMSUMgS0VZLS0
tLS0NCg==",
          "expiry": 1608495423
      }
 ]
```

3. You'll need a service that generates the JWT to send to Omnichannel's servers as a part of starting a chat for an authenticated user.

   a. The JWT header will look similar to the following example.

   ```
   JavaScript
   ```

```
{
  "alg": "RS256",
  "typ": "JWT",
}
```

If you're using multiple public keys, you'll need to pass in the key ID (kid). Your header will look similar to this example:

JavaScript

```
{
  "alg": "RS256",
  "typ": "JWT",
  "kid": "qWO4EaKT1xRO7JC/oqALz6DCVr41B/qL0Hqp4in7hu4="
}
```

b. The JWT payload should include:

- At minimum, the following claims:

Claim	Definition
iss	The issuer of the token.
iat	The date the token was issued, in numeric date format.
exp	The expiration date of this token, in numeric date format.
sub	The subject of the claim. **NOTE:** We recommend that you pass the GUID of the contact or account record in Customer Service for the logged-in user. This GUID will be used to identify and link the contact record to the conversation.

- **lwicontexts** The context variables to pass in as part of the conversation, either for routing purposes or to display to the agent.
  More information:
  Manage custom context
  setAuthTokenProvider method
  Identify records automatically using context variables

- Any other data that you want to pass.

Your payload will look similar to this example:

JavaScript

```
  {
      "sub" : "87b4d06c-abc2-e811-a9b0-000d3a10e09e",
      "lwicontexts" :"{\"msdyn_cartvalue\":\"10000\",
\"msdyn_isvip\":\"false\", \"portalcontactid\":\"87b4d06c-abc2-e811-
a9b0-000d3a10e09e\"}",
      "iat" : 1542622071,
      "iss" : "contosohelp.com",
      "exp" : 1542625672,
      "nbf" : 1542622072
  }
```

c. The JWT signature should be signed by your private key.

> **Note**
>
> - If the token has expired or is invalid, the chat widget will throw an error event.
> - The **setContextProvider method** is not supported for authenticated chat. You should pass in your lwicontexts as a part of the JWT payload.

4. Create a JavaScript function on your website that will accept a callback function and return a JWT to the callback function. To avoid timeout, this JavaScript function should return a JWT within 10 seconds. This JWT must:

   - Contain the header, payload, and signature from step 3.
   - Be signed by the private key from the key pair in step 1.

     (We recommend generating your JWT on your web server).

     The name of this JavaScript method will be used to create the authentication settings record in the Omnichannel admin app.

     JavaScript

     ```
     // This is a sample JavaScript client function

     auth.getAuthenticationToken = function(callback){

       var xhttp = new XMLHttpRequest();
       xhttp.onreadystatechange = function() {
           if (this.readyState == 4 && this.status == 200) {
               callback(xhttp.responseText);
           }
       };
       xhttp.onerror = function(error) {
     ```

```
        callback(null);
    };
//Replace this with a call to your token generating service
    xhttp.open("GET", "https://contosohelp.com/token", true);
    xhttp.send();
}
```

5. Your developer will need to share the following information with your Omnichannel administrator:

   a. The URL of the public key service from step 2.

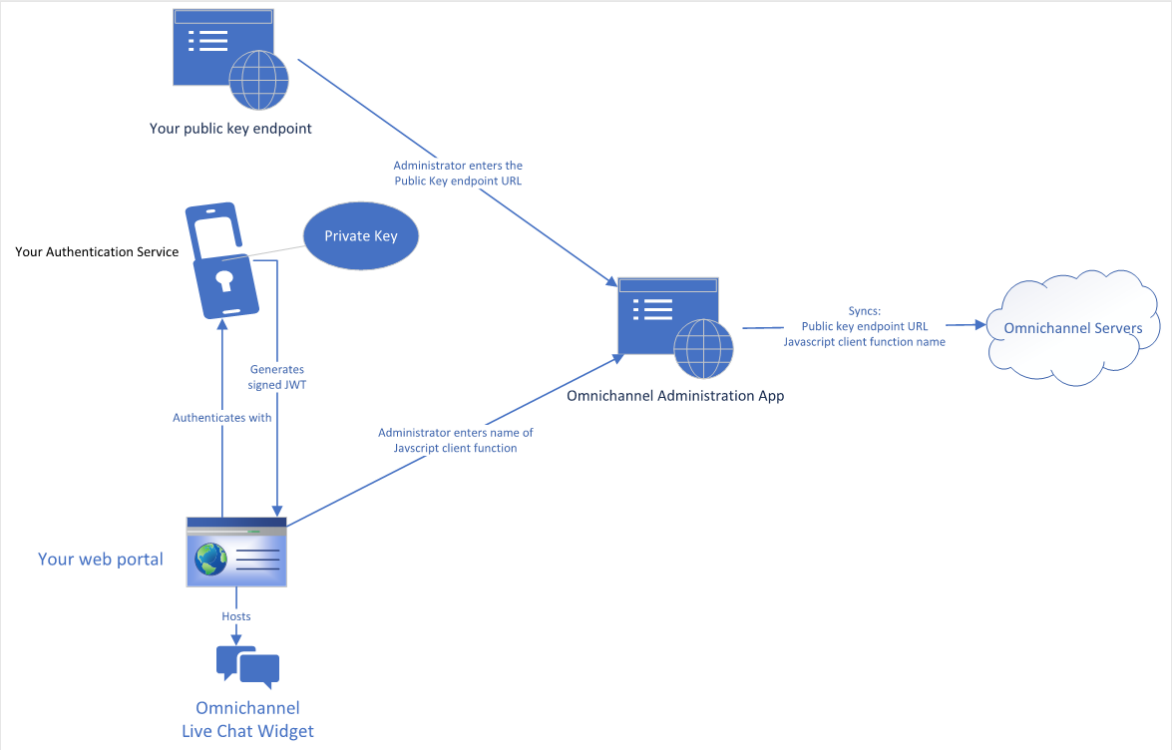
   Example: https://www.contoso.com/auth/publickey

   b. The name of the JavaScript client function from step 4. The live chat widget will call this name internally during the start of a chat.

   Example: auth.getAuthenticationToken

   > **Note**
   >
   > If your user experience exposes the chat button before users are authenticated, make sure to redirect them to your authentication page as needed. This can be done in the method in step 4, or as an earlier step in your user flow.

   The following illustration demonstrates the setup.



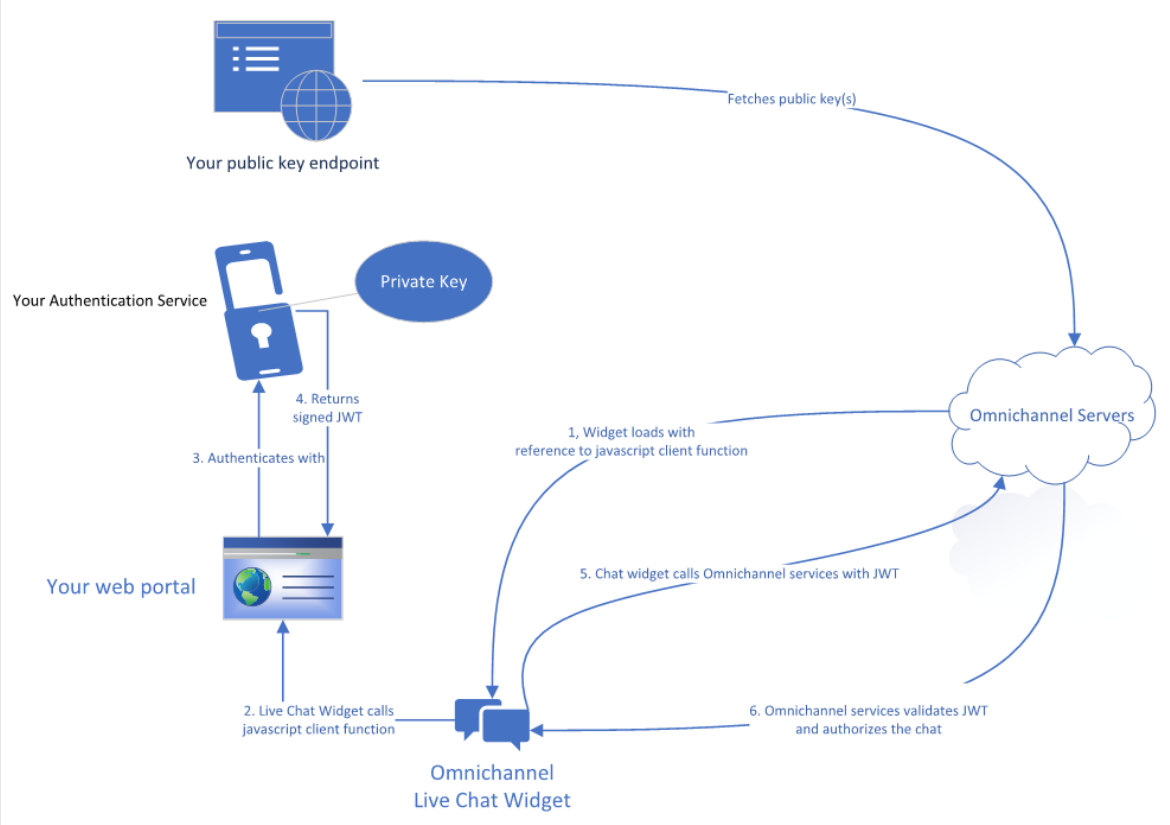
Then, you can set up authenticated chat by following these steps:

Set up authenticated chat

1. Go to the admin app, and create an authentication settings record with the information from step 5 of the previous section. More information: Create an authentication setting record for chat

2. Associate the authentication settings to the chat widget that will have an authenticated experience. More information: Add authentication to chat widget

   The following illustration demonstrates the call sequence when a user accesses your chat in an authenticated setup.



Create authentication settings for Apple Messages for Business

Prerequisites

- Administrators who are configuring authentication settings will need more security permissions. More information: Set up security permissions for a field

- Make sure your organization has working knowledge of OAuth 2.0 code flow or OAuth 2.0 OpenID connect flow. Steps for both types are outlined below.
- Confirm that your organization has at least one Apple Messages for Business **Authentication type rich message**. This rich message is required for setup.

Create an authentication setting record for Apple Messages for Business using OAuth 2.0 code flow

1. In the Customer Service admin center or Omnichannel admin center app site map, select **Customer settings**, and then select **Manage for Authentication settings**. A list of existing authentication settings is shown.
2. Select **New authentication setting**, and on the **Add authentication setting** page, provide the following details:

    a. On the **Channel type** page, enter a name and select **Apple Messages for Business** as the channel type.
    By default, the authentication type is **OAuth 2.0 code flow**.

    b. On the **Add authentication setting** page, provide the following information:

    - **Client ID**: OAuth 2.0 Client Identifier issued by an authorization server.
    - **Client secret**: Client secret used to authenticate requests sent to an authorization server.
    - **Scope**: Each scope added will specify which pieces of user data you've requested from the customer. The scope content must exactly match the ones available through your service provider.
    - **Access Token URL**: The service provider's endpoint where an access token can be requested.
    - **Decrypted token URL**: Endpoint where the OAuth 2.0 API can retrieve the customer info requested in the scope.

    c. On the **Additional details** page, you can optionally define an access token expiry time, in seconds. The default expiry time is one hour.
    After the specified time, the **Authenticated** field in the **Active Conversation** section of a previously authenticated conversation will change to **No**.

    d. On the **Rich messages** page, select **Add**, and then select one or more rich messages to associate to this authentication setting.

    e. Review the **Summary** page, and then select **Finish**. The authentication setting is configured.

Create an authentication setting record for Apple Messages for Business using OAuth 2.0 OpenID connect flow

1. In the Customer Service admin center or Omnichannel admin center app site map, select **Customer settings**, and then select **Manage for Authentication settings**. A list of existing authentication settings is shown.

2. Select **New authentication setting**, and on the **Add authentication setting** page, provide the following details:

   a. On the **Channel type** page, enter a name and select **Apple Messages for Business** as the channel type.

   b. Change the authentication type **OAuth 2.0 OpenID connect flow**.

   c. On the **Add authentication setting** page, provide the following information:

      - **Client ID**: OAuth 2.0 Client Identifier issued by an authorization server.
      - **Client secret**: Client secret used to authenticate requests sent to an authorization server.
      - **Scope**: Each scope added will specify which pieces of user data you've requested from the customer. The scope content must exactly match the ones available through your service provider.
      - **Access Token URL**: The service provider's endpoint where an access token can be requested.
      - **Decrypted token URL**: Endpoint where the OAuth 2.0 API can retrieve the customer info requested in the scope.
      - **Additional parameters**: Allows authentication services to take extra parameters from the request.

   d. On the **Additional details** page, you can optionally define an access token expiry time, in seconds. The default expiry time is one hour.
   After the specified time, the **Authenticated** field in the **Customer summary** section of a previously authenticated conversation will change to **No**.

   e. On the **Rich messages** page, select **Add**, and then select one or more rich messages to associate to this authentication setting.

   f. Review the **Summary** page, and then select **Next**. The authentication setting is configured.

   g. On the **Redirect information** page, copy the URL. You'll add this URL to the authentication service provider's website under allowed callback URLs.

h. Select **Finish**.

Add authentication to an Apple Messages for Business channel

1. Open the workstream containing the channel instance to which you want to add authentication.
2. On the **Behaviors** page of the channel settings, navigate to **Authentication settings**, enable the capability, and select the correct setting from the dropdown menu. More information: Configure an Apple Messages for Business channel
3. Review or update the authentication settings for each channel instance by selecting **Edit**.

See also

Add a chat widget
Configure a pre-conversation survey
Create quick replies
Create and manage operating hours
Embed chat widget in Power Apps portals
Automatically identify customers

Configure authentication settings

Article • 04/06/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

You can create authentication settings to validate a signed-in customer from a domain, and extract information based on the context variables that are defined. You can differentiate your anonymous customers from authenticated customers, and you can create rules based on the context variables.

For example, you can have separate queues for anonymous customers and authenticated customers. Because you have more information about your authenticated customers, you can also prioritize them based on specific variables, such as a shopping cart value or a privileged status.

After you create an authentication settings record, you must add it to a channel instance within a workstream's channel setup to make it work. Authentication is supported for these channels:

- Chat
- Apple Messages for Business

The agent will get a notification in the **Conversation summary** section whether the customer is authenticated or not. The **Authenticated** field is set to **Yes** or **No** based on the authentication of the customer. More information: Conversation summary

Prerequisites

- Make sure your organization has working knowledge of OAuth 2.0 and JSON Web Tokens (JWTs).
- Verify that you have permissions on the secure columns. More information: Configure permissions to access secure columns

Create an authentication setting record for chat

You can create a chat authentication setting record in the admin app.

1. Go to one of the admin apps, and perform the following steps.

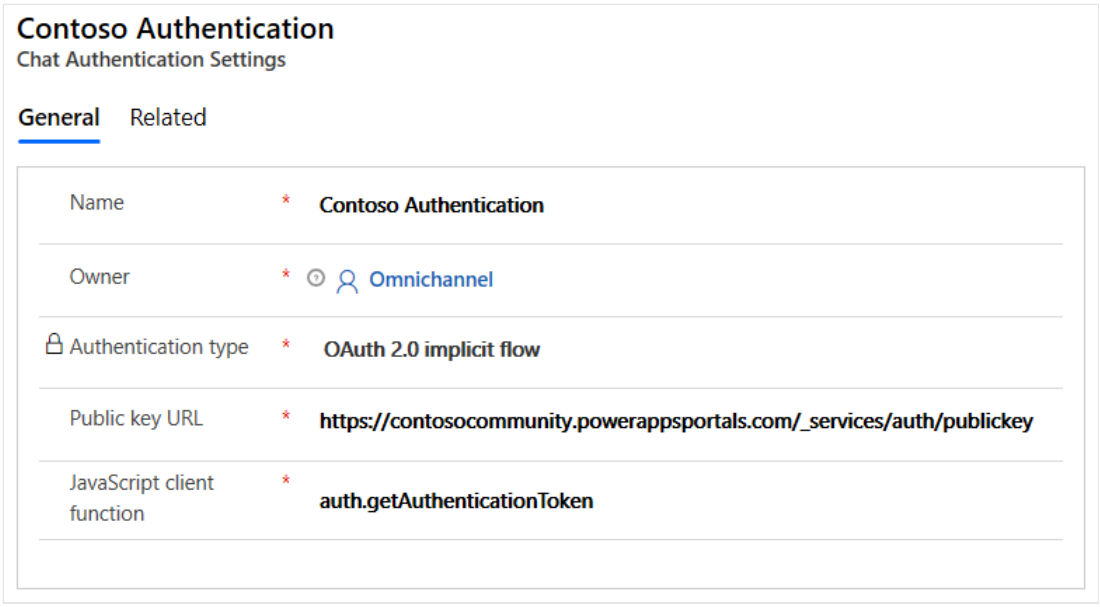
   Customer Service admin center

   a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
   b. In the **Authentication settings** section, select **Manage**.

   The **Authentication settings** page is displayed.

2. Select **New Authentication Settings**, and provide the following information on the **Add authentication setting** page:

   - **Name**: Enter a name for the authentication setting.
   - **Owner:** Accept the default value or change to a required value.
   - **Authentication type:** By default, it's OAuth 2.0 implicit flow that can't be edited.
   - **Public key URL**: Specify the public key URL of the domain. This URL is used to validate the information that comes in from the JavaScript Object Notation (JSON) Web Token (JWT) of the domain that a customer has signed in to.
   - **JavaScript client function**: Specify the JavaScript client function to use for authentication. This function extracts a token from the token endpoint.



For more information about how to find the public key URL and JavaScript client function, see the Setup for Power Apps portals or Setup for custom portals section later in this article.

3. Select **Save**.

Add authentication to chat widget

1. Open the chat widget to which you want to add authentication and do one of the following steps:

   - In Customer Service admin center or Omnichannel admin center, go to the **Behaviors** tab.
   - In Omnichannel Administration, go to the **Basic details** tab.

2. In the **Authentication settings** box, browse and select the chat authentication record.

When a signed-in customer on a portal opens the chat widget, the JavaScript client function passes the JWT from the client to the server. The JWT is decrypted and validated by using the public key, and the information is then passed to the chat agent in Omnichannel for Customer Service. As an admin, you can also pass additional information about the signed-in customer in the JWT by defining custom context variables. The context variables must be defined exactly as they're defined in the workstream that's associated with the chat widget. More information: Manage context variables

Setup for Power Apps portals

If you're adding authentication for a chat widget on a website developed using Power Apps portals, then the public key URL and JavaScript client function are available out of the box. You'll need to upload a custom certificate to have a valid public key URL on Power Apps portals.

- **Public key URL**: `<portal_base_URL>/_services/auth/publickey`
- **JavaScript client function**: `auth.getAuthenticationToken`

The Power Apps portal will try to automatically link a contact record to the conversation through the context passed in its JavaScript client function.

Setup for custom portals

If you're adding an authenticated chat experience to a custom website that isn't developed using Power Apps portals, your web development team must perform the following steps before your administrators can configure authenticated chat:

1. Generate a public/private key pair in their authentication servers. The keys must be generated using the RSA256 algorithm.

   Here's sample code for generating private/public key pairs.

   Powershell

   ```
   openssl genpkey -algorithm RSA -out private_key.pem -pkeyopt
   rsa_keygen_bits:2048
   openssl rsa -pubout -in private_key.pem -out public_key.pem
   ```

2. Create an endpoint that will return your public keys. The Omnichannel servers will use the public keys to validate the JWT token passed as a part of authorizing the chat request. The URL of this endpoint will be entered into the admin app when creating an authentication setting record.

   Your public key endpoint will look similar to this example:

   ```
   -----BEGIN PUBLIC KEY-----
   NIIBIjANBgkqhkiG9w0BAQEFABCOPQ8AMIIBCgKCAQEAn+BjbrY5yhSpLjcV3seP
   mNvAvtQ/zLwkjCbpc8c0xVUOzEdH8tq4fPi/X5P/Uf2CJomWjdOf1wffmOZjFasx
   ELG+poTqy5uX2dNhH6lOMUsV31QGG36skLivpLBCSK6lWlzsV6WGkb/m8r86aGzp
   jtNhw8yvoTYB4updDrJ8pC+tx4EWK0WEmKn1GsW6TjUtxJjcTLI1puSbmcGHbkSi
   RSbWkKPqaEVFALprw+W5ZCung5QX3KOkY/rJd+2JwULm7okyQCQaF7qwa5i9Uf65
   7M6ZL4vsDevq7E/v3tf6qxpSSHzt4XspXVQty9QHhqDqBEY3PfI4L2JjgIGuPhfS
   YQIDAQAB
   ```

```
    -----END PUBLIC KEY-----
```

If you need to use multiple public keys, your public key endpoint can return a set of `<kid, publickey>` pairs, where `kid` refers to the key ID. Key ID pairs must be unique. The kid will need to be passed in the JWT token in step 4. If you're using multiple keys, your public key endpoint should return something that looks like this. The public key is base64-encoded.

```
 [
      {
          "kid": "qWO4EaKT1xRO7JC/oqALz6DCVr41B/qL0Hqp4in7hu4=",
          "publicKey":
LS0tLS1CRUdJTiBQVUJMSUMgS0VZLS0tLS0NCk1JSUJJakFOQmdrcWhraUc5dzBCQVFFRkFBT0NB
UThBTUlJQkNnS0NBUUVBbjFLdXhtSEh3V3hjelZSWGRBVmMNCnBEaFZwa0FnYklhTGZBUWc1bFpv
emZqc29vcWRGWkl0VlFMdmRERWFVeDNqTytrTkxZM0JFRnBYVDZTN3ZNZCsNCnZoM2hpMDNsQ1dI
NnNCTWtaSWtuUUliMnFpekFsT0diU2EvK3JrUElnYnpXQjRpT1QyWVhyOVB4bXR5d2o4WUINCnYr
am55VU5DSzMyZy9FYWsvM0k3YW1vZ2pJY0JISjNFTjVuQWJBMExVVnJwMW5DODJmeEVPOHNJTzNY
djlWNVUNCnc5QnVTVVFRSmtMejNQYVI5WTdRZUEyNW5LUGtqTXZ2Y0UxVU5oeVpIYlNLbmorSitk
ZmFjb1hsSGtyMEdGTXYNCldkSDZqR0pWcGNQMHBkNjFOa3JKa2c0aStheThwS2ZqdjNUOHN3NWda
VHFweFFaaitVRWxqaVM0SHRPTlhkNlENCnZRSURBUUFCDQotLS0tLUVORCBQVUJMSUMgS0VZLS0t
LS0NCg==",
          "expiry": 1608495423
      },
 {
          "kid": "qWO4EaKT1xRO7JC/oqALz6DCVr41B/qL0Hqp__valid=",
          "publicKey":
"LS0tLS1CRUdJTiBQVUJMSUMgS0VZLS0tLS0NCk1JSUJJakFOQmdrcWhraUc5dzBCQVFFRkFBT0N
BUThBTUlJQkNnS0NBUUVBbjFLdXhtSEh3V3hjelZSWGRBVmMNCnBEaFZwa0FnYklhTGZBUWc1bFp
vemZqc29vcWRGWkl0VlFMdmRERWFVeDNqTytrTkxZM0JFRnBYVDZTN3ZNZCsNCnZoM2hpMDNsQ1d
INnNCTWtaSWtuUUliMnFpekFsT0diU2EvK3JrUElnYnpXQjRpT1QyWVhyOVB4bXR5d2o4WUINCnY
ram55VU5DSzMyZy9FYWsvM0k3YW1vZ2pJY0JISjNFTjVuQWJBMExVVnJwMW5DODJmeEVPOHNJTzN
YdjlWNVUNCnc5QnVTVVFRSmtMejNQYVI5WTdRZUEyNW5LUGtqTXZ2Y0UxVU5oeVpIYlNLbmorSit
kZmFjb1hsSGtyMEdGTXYNCldkSDZqR0pWcGNQMHBkNjFOa3JKa2c0aStheThwS2ZqdjNUOHN3NWd
aVHFweFFaaitVRWxqaVM0SHRPTlhkNlENCnZRSURBUUFCDQotLS0tLUVORCBQVUJMSUMgS0VZLS0
tLS0NCg==",
          "expiry": 1608495423
      }
 ]
```

3. You'll need a service that generates the JWT to send to Omnichannel's servers as a part of starting a chat for an authenticated user.

   a. The JWT header will look similar to the following example.

   ```
   JavaScript
   ```

```
{
  "alg": "RS256",
  "typ": "JWT",
}
```

If you're using multiple public keys, you'll need to pass in the key ID (kid). Your header will look similar to this example:

JavaScript

```
{
  "alg": "RS256",
  "typ": "JWT",
  "kid": "qWO4EaKT1xRO7JC/oqALz6DCVr41B/qL0Hqp4in7hu4="
}
```

b. The JWT payload should include:

- At minimum, the following claims:

Claim	Definition
iss	The issuer of the token.
iat	The date the token was issued, in numeric date format.
exp	The expiration date of this token, in numeric date format.
sub	The subject of the claim. **NOTE:** We recommend that you pass the GUID of the contact or account record in Customer Service for the logged-in user. This GUID will be used to identify and link the contact record to the conversation.

- **lwicontexts** The context variables to pass in as part of the conversation, either for routing purposes or to display to the agent.
  More information:
  Manage custom context
  setAuthTokenProvider method
  Identify records automatically using context variables

- Any other data that you want to pass.

Your payload will look similar to this example:

JavaScript

```
  {
      "sub" : "87b4d06c-abc2-e811-a9b0-000d3a10e09e",
      "lwicontexts" :"{\"msdyn_cartvalue\":\"10000\",
\"msdyn_isvip\":\"false\", \"portalcontactid\":\"87b4d06c-abc2-e811-
a9b0-000d3a10e09e\"}",
      "iat" : 1542622071,
      "iss" : "contosohelp.com",
      "exp" : 1542625672,
      "nbf" : 1542622072
  }
```

c. The JWT signature should be signed by your private key.

> **Note**
>
> - If the token has expired or is invalid, the chat widget will throw an error event.
> - The **setContextProvider method** is not supported for authenticated chat. You should pass in your lwicontexts as a part of the JWT payload.

4. Create a JavaScript function on your website that will accept a callback function and return a JWT to the callback function. To avoid timeout, this JavaScript function should return a JWT within 10 seconds. This JWT must:

   - Contain the header, payload, and signature from step 3.
   - Be signed by the private key from the key pair in step 1.

     (We recommend generating your JWT on your web server).

     The name of this JavaScript method will be used to create the authentication settings record in the Omnichannel admin app.

     JavaScript

     ```
     // This is a sample JavaScript client function

     auth.getAuthenticationToken = function(callback){

       var xhttp = new XMLHttpRequest();
       xhttp.onreadystatechange = function() {
           if (this.readyState == 4 && this.status == 200) {
               callback(xhttp.responseText);
           }
       };
       xhttp.onerror = function(error) {
     ```

```
        callback(null);
    };
//Replace this with a call to your token generating service
    xhttp.open("GET", "https://contosohelp.com/token", true);
    xhttp.send();
}
```

5. Your developer will need to share the following information with your Omnichannel administrator:

   a. The URL of the public key service from step 2.

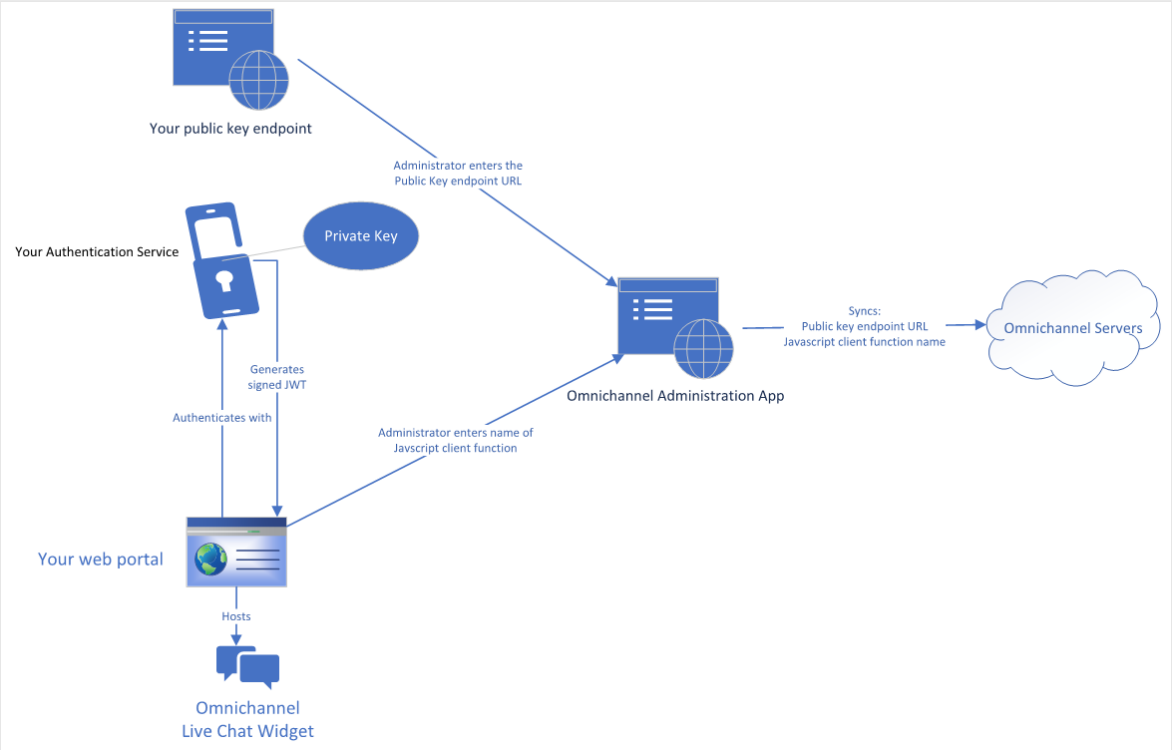
   Example: https://www.contoso.com/auth/publickey

   b. The name of the JavaScript client function from step 4. The live chat widget will call this name internally during the start of a chat.

   Example: auth.getAuthenticationToken

   > **Note**
   >
   > If your user experience exposes the chat button before users are authenticated, make sure to redirect them to your authentication page as needed. This can be done in the method in step 4, or as an earlier step in your user flow.

   The following illustration demonstrates the setup.



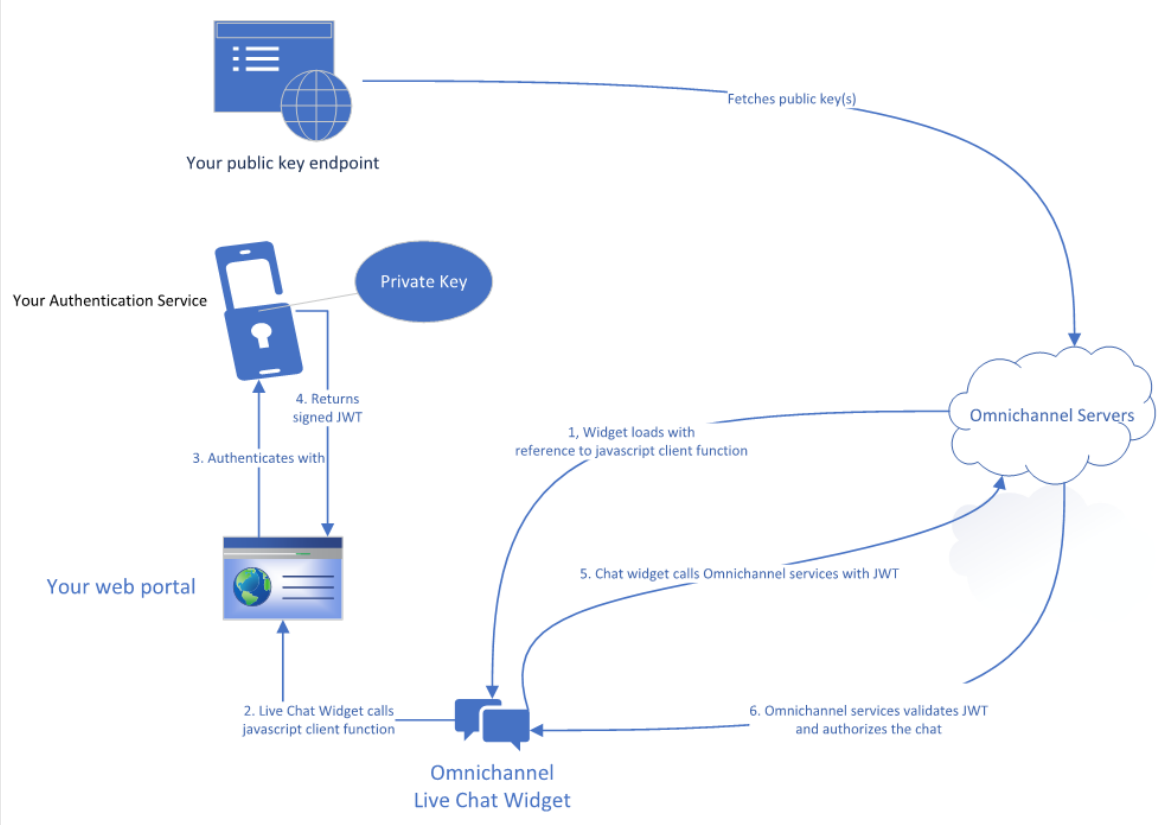
Then, you can set up authenticated chat by following these steps:

Set up authenticated chat

1. Go to the admin app, and create an authentication settings record with the information from step 5 of the previous section. More information: Create an authentication setting record for chat

2. Associate the authentication settings to the chat widget that will have an authenticated experience. More information: Add authentication to chat widget

   The following illustration demonstrates the call sequence when a user accesses your chat in an authenticated setup.



Create authentication settings for Apple Messages for Business

Prerequisites

- Administrators who are configuring authentication settings will need more security permissions. More information: Set up security permissions for a field

- Make sure your organization has working knowledge of OAuth 2.0 code flow or OAuth 2.0 OpenID connect flow. Steps for both types are outlined below.
- Confirm that your organization has at least one Apple Messages for Business **Authentication type rich message**. This rich message is required for setup.

Create an authentication setting record for Apple Messages for Business using OAuth 2.0 code flow

1. In the Customer Service admin center or Omnichannel admin center app site map, select **Customer settings**, and then select **Manage for Authentication settings**. A list of existing authentication settings is shown.
2. Select **New authentication setting**, and on the **Add authentication setting** page, provide the following details:

    a. On the **Channel type** page, enter a name and select **Apple Messages for Business** as the channel type.
    By default, the authentication type is **OAuth 2.0 code flow**.

    b. On the **Add authentication setting** page, provide the following information:

    - **Client ID**: OAuth 2.0 Client Identifier issued by an authorization server.
    - **Client secret**: Client secret used to authenticate requests sent to an authorization server.
    - **Scope**: Each scope added will specify which pieces of user data you've requested from the customer. The scope content must exactly match the ones available through your service provider.
    - **Access Token URL**: The service provider's endpoint where an access token can be requested.
    - **Decrypted token URL**: Endpoint where the OAuth 2.0 API can retrieve the customer info requested in the scope.

    c. On the **Additional details** page, you can optionally define an access token expiry time, in seconds. The default expiry time is one hour.
    After the specified time, the **Authenticated** field in the **Active Conversation** section of a previously authenticated conversation will change to **No**.

    d. On the **Rich messages** page, select **Add**, and then select one or more rich messages to associate to this authentication setting.

    e. Review the **Summary** page, and then select **Finish**. The authentication setting is configured.

Create an authentication setting record for Apple Messages for Business using OAuth 2.0 OpenID connect flow

1. In the Customer Service admin center or Omnichannel admin center app site map, select **Customer settings**, and then select **Manage for Authentication settings**. A list of existing authentication settings is shown.

2. Select **New authentication setting**, and on the **Add authentication setting** page, provide the following details:

   a. On the **Channel type** page, enter a name and select **Apple Messages for Business** as the channel type.

   b. Change the authentication type **OAuth 2.0 OpenID connect flow**.

   c. On the **Add authentication setting** page, provide the following information:

      - **Client ID**: OAuth 2.0 Client Identifier issued by an authorization server.
      - **Client secret**: Client secret used to authenticate requests sent to an authorization server.
      - **Scope**: Each scope added will specify which pieces of user data you've requested from the customer. The scope content must exactly match the ones available through your service provider.
      - **Access Token URL**: The service provider's endpoint where an access token can be requested.
      - **Decrypted token URL**: Endpoint where the OAuth 2.0 API can retrieve the customer info requested in the scope.
      - **Additional parameters**: Allows authentication services to take extra parameters from the request.

   d. On the **Additional details** page, you can optionally define an access token expiry time, in seconds. The default expiry time is one hour.
   After the specified time, the **Authenticated** field in the **Customer summary** section of a previously authenticated conversation will change to **No**.

   e. On the **Rich messages** page, select **Add**, and then select one or more rich messages to associate to this authentication setting.

   f. Review the **Summary** page, and then select **Next**. The authentication setting is configured.

   g. On the **Redirect information** page, copy the URL. You'll add this URL to the authentication service provider's website under allowed callback URLs.

h. Select **Finish**.

Add authentication to an Apple Messages for Business channel

1. Open the workstream containing the channel instance to which you want to add authentication.
2. On the **Behaviors** page of the channel settings, navigate to **Authentication settings**, enable the capability, and select the correct setting from the dropdown menu. More information: Configure an Apple Messages for Business channel
3. Review or update the authentication settings for each channel instance by selecting **Edit**.

See also

Add a chat widget
Configure a pre-conversation survey
Create quick replies
Create and manage operating hours
Embed chat widget in Power Apps portals
Automatically identify customers

Configure payment profiles

Article • 10/27/2022

You can create payment profiles to enable conversational commerce for supported channels. Once configured, your agents can help customers complete secure transactions without having to leave the messaging experience.

After you create a payment profile record, you must add it to a channel instance within a workstream's channel setup to make it work. Conversational commerce is supported for Apple Messages for Business.

Create an Apple Messages for Business payment profile for Apple Pay

Prerequisites

Verify that you have permissions on the secure columns. More information: Configure permissions to access secure columns

Before adding an Apple Pay payment profile, make sure to complete the Apple Pay integration steps documented by Apple. More information: Apple Pay - Apple Messages for Business

Create an Apple Pay payment profile

1. In the site map of Omnichannel admin center app, select **Customer settings**, and then select **Manage for Payment profiles**. A list of existing records is shown.
2. Select **Add** at the top of the page to create a new record.
3. In the **Create new payment profile** pages, provide the following details:
    - On the **Channel type** page, enter a name and select Apple Messages for Business as the channel type. By default, the only channel type currently supported is Apple Messages for Business.
4. On the **Details** page, provide the following information:
    - **Merchant friendly name**: Your business's customer-facing name. This will be the name your customer sees within the Apple Pay request. This name shouldn't be localized.

- **Merchant ID**: Your unique identifier assigned to your business when registering as a merchant for Apple Pay.
- **Merchant certificate**: A certificate associated with your merchant ID, used to secure transaction data. Apple Pay servers use the certificate's public key to encrypt payment data.
- **Certificate password**: The private key used to generate secure Apple Pay sessions.
- **Payment gateway URL**: The endpoint where payment information and requested contact information and sent to be processed.
- **Merchant domain URL**: The website domain associated with your Apple Pay Merchant Account.
- **Merchant two-letter country code**: Country codes are formatted by their ISO 3166-1 alpha-2 code. Use the country code for where payments will be processed.

5. On the **Payment options** page, provide the following information:
    - **Merchant capabilities**: The payment types you can accept. 3D Secure is required for channel support.
    - **Supported Networks**: The networks that support transactions between your Apple Pay merchant account and card issuers.
6. On the **Rich messages** page, select **Add**, and then select one or more Apple Pay rich messages to associate with this authentication setting.
   An Apple Pay type rich message may be associated to more than one payment profile. This is because each channel instance may only support one payment profile.
7. Review the **Summary** page, and then select **Finish**. The authentication setting is configured.

Add a payment profile to an Apple Messages for Business channel

1. Open the workstream containing the channel instance for which you want to enable Apple Pay.

2. On the **User features** page of the channel settings, navigate to **Apple Pay**, enable the capability, and select the correct setting from the dropdown. More information: Configure an Apple Messages for Business channel instance in Omnichannel admin center

3. Save your changes.

4. Review or update the Apple Pay settings for any channel instance by selecting **Edit**.

Limitations

Description	Limitation
Country code: This is the two-letter ISO 3166-1 alpha-2 code that denotes which country payments will be processed in.	China isn't currently a supported country, as payments must go through a separate payment endpoint.
Merchant capabilities: Capabilities for processing payments	- It isn't currently possible to enable support for China UnionPay. - You can build an adaptive card by adding a skill through Power Virtual Agents. More information: Use Microsoft Bot Framework Skills in Power Virtual Agents - Adaptive card styling isn't supported.
Supported networks: This property constrains the payment methods that the user can select to fund the payment.	- Supported networks are currently limited to American Express, Visa, Discover, and Mastercard. - Some locally issued cards may not work even when the **Merchant two-letter country code** is correct. The following countries/regions may be impacted: Saudi Arabia and China.

See also

Configure Apple Messages for Business
Understand and create workstreams
Create and manage routing rules
Configure automated messages
Configure a post-conversation survey
Skill-based routing
Create message templates
Templates

Delete a configured channel
Support for live chat and asynchronous channels

Enable real-time translation of conversations

Article • 08/18/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

With the real-time message translation feature, agents can support customers in the language they elect to be serviced in. When you enable language translation, messages between the customer and support agent—and messages among support agents who consult and collaborate internally, such as supervisors or SMEs—are translated. The real-time translation feature is enabled as a plug-in that exposes APIs to bring in third-party translation services and also provides a native implementation.

All the languages that are supported in Omnichannel for Customer Service are supported for the agent in the conversations. For the list of supported languages, see Language availability.

> **Important**
>
> The language translation feature isn't supported in Omnichannel for Customer Service on Unified Service Desk.

Prerequisites

- You must add a web resource and make sure that the required language translation services are configured. More information: Add a web resource for real-time translation
- Enable call recording and transcription for the translated voice call transcripts to be displayed. More information: Enable call recording and transcription for voice

Enable real-time translation for agent and customer conversations

You can enable real-time translation in the Customer Service admin center or Omnichannel admin center app.

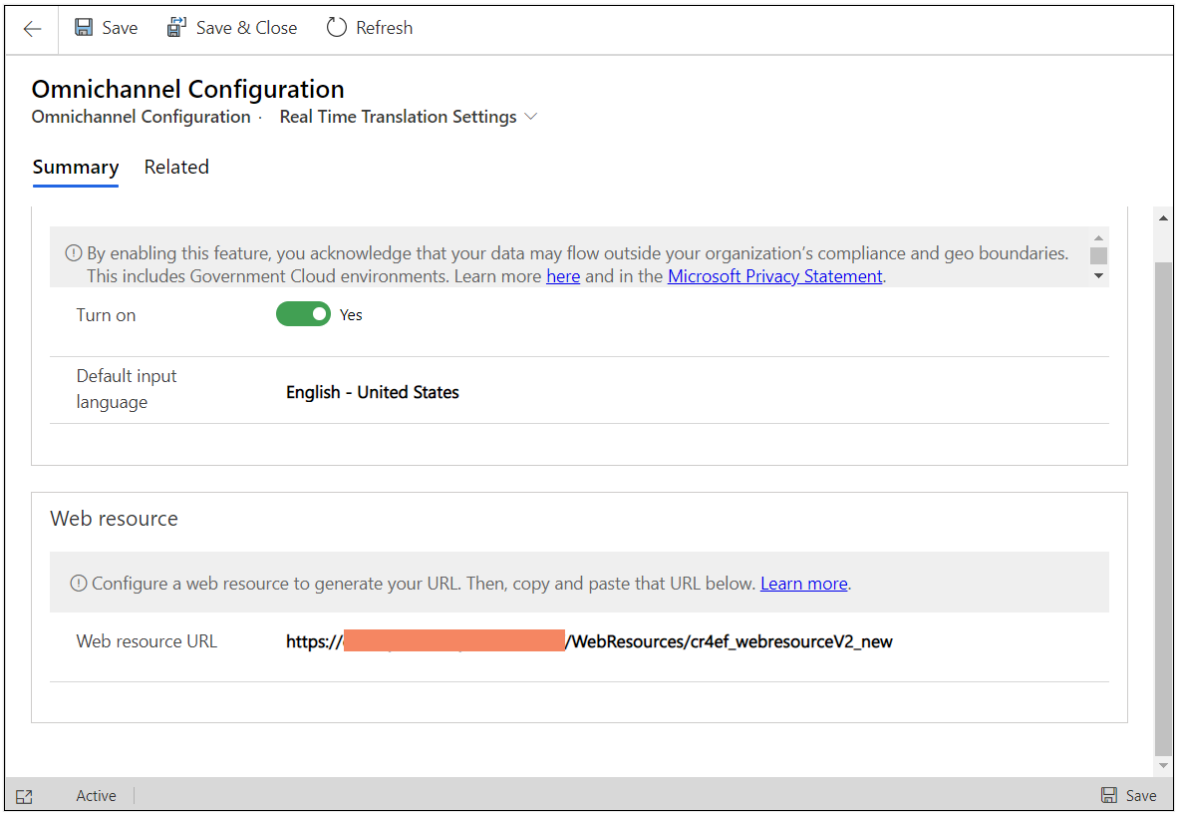
1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Real-time translation** section, select **Manage**.

   The **Omnichannel Configuration** page is displayed.

2. On the **Omnichannel Configuration·Real Time Translation Settings** page, in the **General Information** area, set the toggle for **Turn on** to **Yes**.
3. In **Default input language**, select the language for agents to converse with customers. The translation engine translates the customer messages for agents to the language specified. By, default, it's set to English (en-us).
4. In the **Web resource** area, in the **Web resource URL** box, enter the link of the web resource.



5. Select **Save**.

See also

Add a web resource for real-time translation

Real-time language translation of conversations for agents and customers

Set up visitor location detection

Article • 10/27/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can configure your chat widget to detect a visitor's location based on their latitude and longitude. With location detection enabled, visitors receive a prompt in their web browser when they start to chat. If the visitor allows their location to be shared, it will passed through to the agent. Agents can then use this information to provide a personalized support experience.

> **Note**
>
> If a customer has turned off location sharing from their web browser, the location cannot be detected even if you have enabled location detection.

To enable location detection, you must first get your Bing Maps API key and create a geo location provider record. After you create a geo location provider record, you must add it in the **Location** tab of the appropriate chat widgets to enable location detection. For information on how to get the Bing Maps API key, see Getting a Bing Maps Key.

Prerequisite

Make sure you have permissions on the secure columns. More information: Configure permissions to access secure columns

Create a geo location provider record

You can create a geo location provider record in the Customer Service admin center or Omnichannel admin center app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

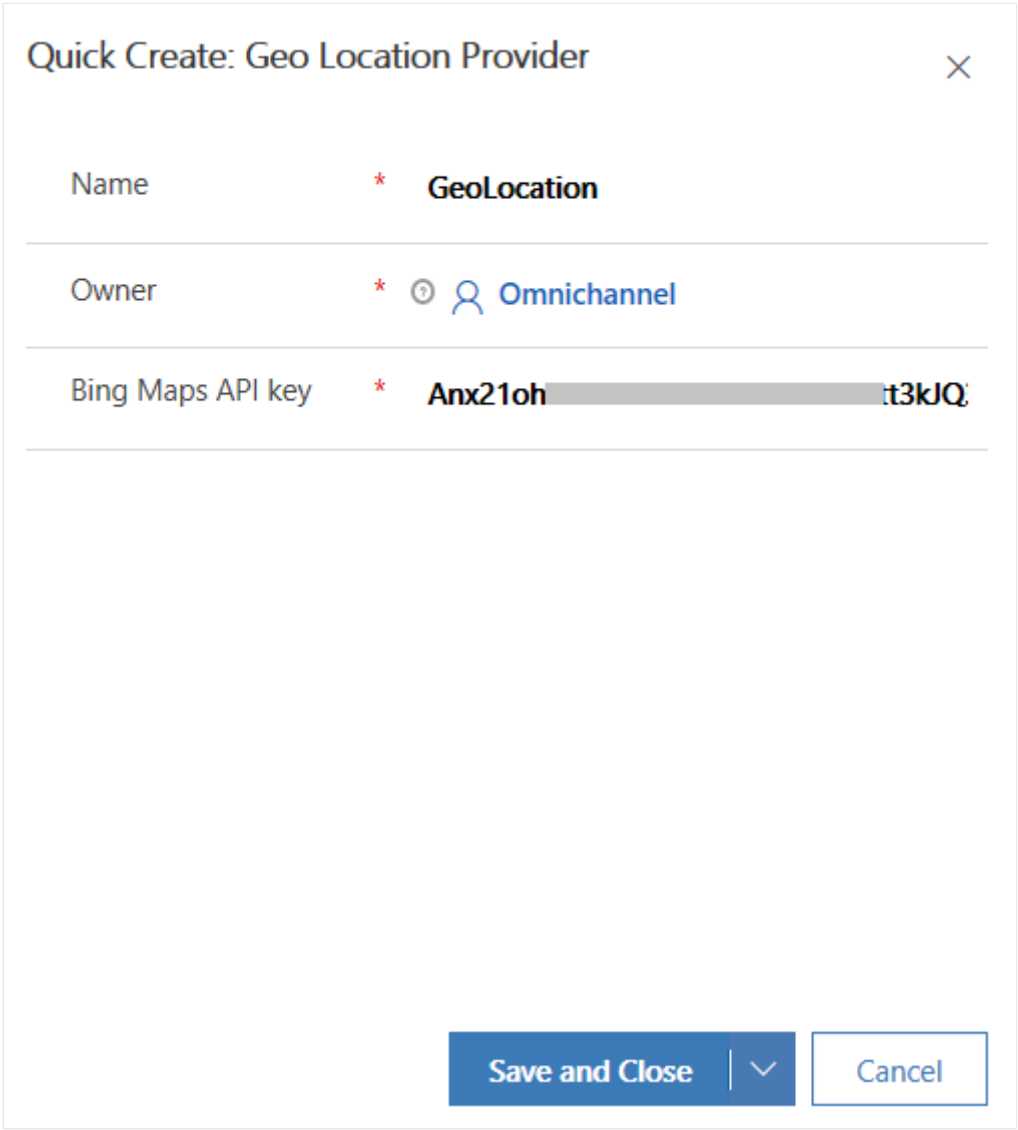
a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
b. In the **Geo location** section, select **Manage**.

The **Active Geo Location Providers** page is displayed.

2. Select **New** to add a geo location provider record.

3. In the **New Geo Location Provider** pane, provide the following information:

- **Name**: Name of the geo location record.
- **Bing Maps API key**: API key of Bing Maps to get the visitor's location.



4. Select **Save and Close**.

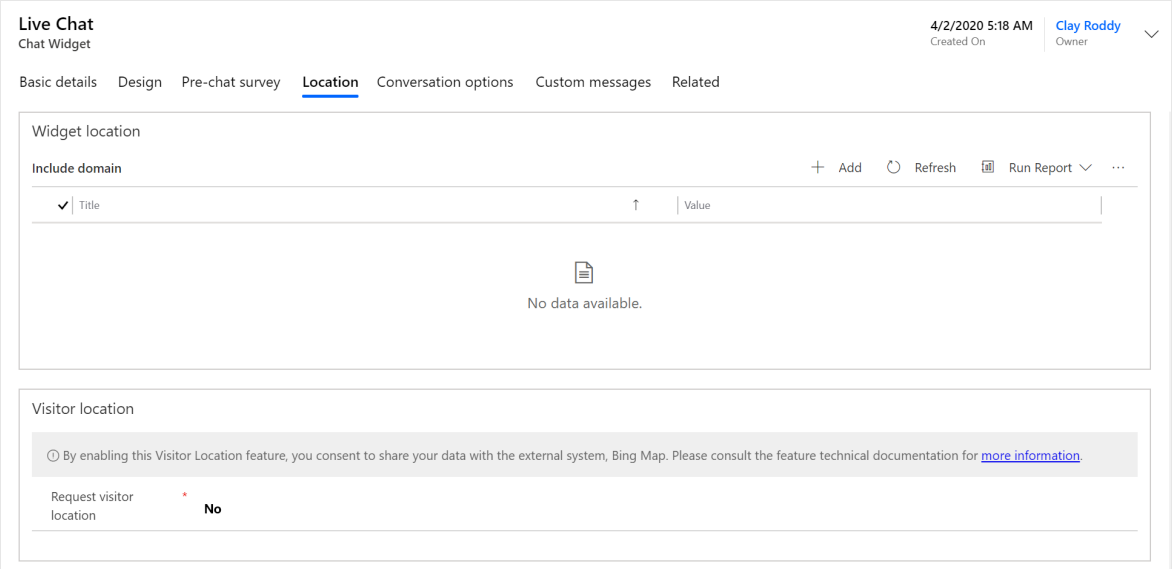
Enable visitor location detection

If you're using Customer Service admin center or Omnichannel admin center app, do the following:

1. Go to the chat channel settings of the chat widget in which you want to enable geo location.
2. On the **Behaviors** tab, for **Customer location detection**, set the toggle to **On**.
3. In the Geo location provider list, select the provider that you've configured.
4. Save the settings.

If you're using the Omnichannel Administration app, do the following:

1. Open the chat widget in which you want to add geo location.
2. Go to the **Location** tab.
3. In the **Visitor location** section, select **Yes** in the **Request visitor location** field.
4. In the **Geo Location Provider** field, browse and select the geo location provider record.



Privacy notice

Location data: If a user approves the browser request for detecting location, the app or website may collect and use precise data about the user's location. Precise location data can be Global Position System (GPS) data, as well as data identifying nearby cell towers and Wi-Fi hotspots. The app or website collects latitude and longitude information from the user's browser and sends it to Bing Maps for converting it into precise location data such as street, city, state, country, and zip code of the user. The app or website may also

send location data to Microsoft Dynamics 365. A user may disable the location detection by turning off the location settings in their web browser settings. All use of Bing Maps is governed by the Bing Maps End User Terms of Use available at https://go.microsoft.com/?linkid=9710837 and the Bing Maps Privacy Statement available at https://go.microsoft.com/fwlink/p/?LinkID=248686. An administrator can turn off this visitor location feature by setting the “Request visitor location” to “No”, so that no further information will be sent to Bing Map from the app or website.

NOTE: Bing Maps is not provisioned in a dedicated data center for exclusive use by you and does not provide data segregation, such as for the Government Community Cloud. Your use of Bing Maps shall not be subject to any product-specific terms and conditions applicable to Dynamics 365 online for Government. If you do not wish to use the Visitor Location feature, then you must ensure that your administrator keeps the feature off.

Enable self-service settings for customer actions in a conversation summary

Article • 03/20/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Overview

The self-service feature displays information about the recent actions that a customer performs before starting a conversation with an agent. This information helps agents understand customer issues and provide a personalized service for enhanced customer satisfaction.

The data about the recent actions is stored in an entity for the conversation that has been closed. A record is created for each self-service action and action type. To learn more, see msdyn_visitorjourney Entity Reference.

Enabling the self-service feature is a two-step process as follows:

1. Add a code snippet in the self-service portal that is configured for your organization. For the sample code and to learn more, see Pass self service history as context.
2. Update the settings in the Omnichannel Administration app.

Enable self service

You can enable the self service feature in the Customer Service admin center or Omnichannel admin center app.

1. Add the code snippet in the customer self-service portal.

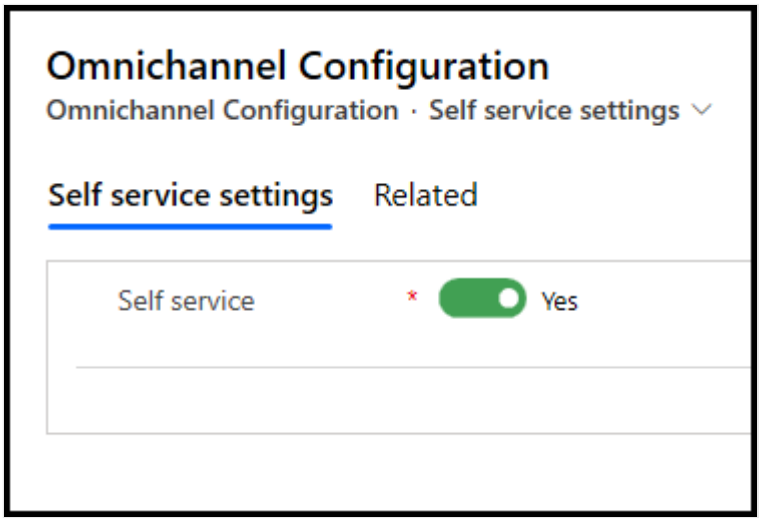
2. Go to one of the apps, and perform the following steps.

   Customer Service admin center

a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
b. In the **Self service** section, select **Manage**.

The **Omnichannel Configuration . Self service settings** page is displayed.

3. Set the **Self service** toggle to **Yes**.



4. Select **Save**. The **Self service** tab will appear for the agent when a chat is started with a customer.

See also

Self service

Configure automated messages

Article • 10/12/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can configure Omnichannel for Customer Service to send automated messages through a channel, such as chat, voice, SMS, or social channels. The **Automated messages** tab in each channel instance enables you to create channel-specific and locale-specific text. You can customize, deactivate, and activate customer and agent-facing messages at the channel level. As an administrator, you can also overwrite or deactivate the preconfigured, out-of-the-box automated messages for any channel instance. The preconfigured automated message triggers are listed in this section.

Display a list of all automated messages

You can view a list of all agent and customer-facing automated messages in your Omnichannel for Customer Service environment.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
   b. In the **Automated messages** section, select **Manage**.

   The **Automated messages** page is displayed.

2. Select one or more of the records to edit the language code and text. If you want to deactivate the messages, select the **Deactivate** button.

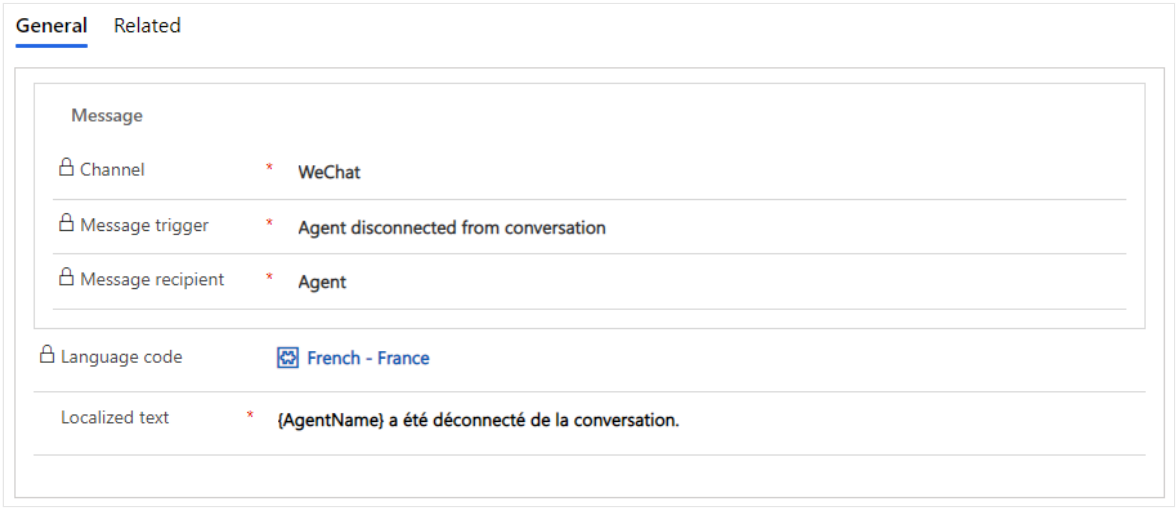
Customize automated messages at the channel level

You can customize messages across instances within a channel. For example, you can apply a change to all Facebook accounts or all SMS numbers.

1. Select a message on the **Automated messages** page, and then select **Edit**.
2. On the **General** tab, edit the **Localized text** field, and then select **Save**.

   The message field supports the following slugs.

Slug	Description
{AgentName}	The full name of the agent who is assigned to the conversation.
{QueueName}	The name of the queue.



Customize automated messages at the channel instance level

You can customize automated messages at the channel instance level. For example, you can apply a change to a specific Facebook account or a specific SMS number. If you don't create customized automated messages at the channel instance level, each instance will inherit the channel-level settings. If you create customized automated messages at the channel instance level, then the channel-level settings are overwritten.

Add custom automated messages

Do the following for the channel in which you want to create custom automated messages in the Customer Service admin center or Omnichannel admin center app:

1. Go to the workstream, and edit the channel instance.

2. On the **Behaviors** page, select **Add message** in the **Custom automated messages** area.
3. On the **Add automated message** pane, select a trigger from the **Select a message trigger** dropdown list.
4. In the **Automated message** box, type the message that should be displayed.
5. Select **Confirm**.
6. Repeat steps 3 through 5 to create multiple messages.
7. Save the settings.

Preconfigured automated message triggers

Message trigger	Definition	When to trigger
Greeting Message for Async Channels and Voice	The automated message played for the customer as soon as the call is connected **Note** If the bot is enabled, ensure that the automated greeting message is different from the bot message.	You can set it up to be played as the first message that the customer should hear when they call the digital contact center.
Agent assigned to a conversation	Message displayed to the customer when the agent is assigned to the conversation	When the agent is assigned to the conversation.
Agent couldn't be assigned to conversation	Message displayed to the customer when agent assignment fails	When work distribution fails or when routing is unable to add the agent to the chat due to system (CBB/IC3) failure. For example, no agents are linked to the queue, or the default queue isn't found. **Note** This trigger isn't applicable to a scenario when a matching agent can't be identified based on the assignment configuration.
Agent disconnected from conversation	Message displayed to the customer when the agent gets disconnected	When the agent gets disconnected due to browser tab closure, browser closure, offline agent presence, or network issue.
Agent ended conversation	Message displayed to the customer when the agent ends the conversation	When the agent selects the End button
Agent joined conversation	Message displayed to the customer when the agent joins a conversation	When the agent accepts the notification.

Message trigger	Definition	When to trigger
Agent joined customer conversation	Message displayed to the customer when the agent joins a customer conversation	When the agent joins a customer conversation.
Agent left customer conversation	Message displayed to the customer when the agent leaves a customer conversation.	When the agent leaves a customer conversation.
Average wait time for customers: Hours (applies to live chat and voice channels only)	Message displayed to the customer with the average wait time displayed in hours	When customer is waiting in queue.
Average wait time for customers: Hours and minutes (applies to live chat and voice channels only)	Message displayed when the customer is waiting in queue with average wait time being displayed in both minutes and hours	When customer is waiting in queue
Average wait time for customers: Minutes (applies to live chat and voice channels only)	Message displayed to the customer with the average wait time displayed in minutes	When customer is waiting in queue.
Consult accepted	Message displayed to the customer when another agent is consulted successfully	When another agent accepts the consult request.
Consult session ended	Message displayed to the customer when consulted agent ends the session	When the consulted agent closes the session.
Customer is next in line	Message displayed when the customer is next in line in the queue	When customer is next in line in the queue.
Customer's position in queue	Message displayed when the customer is waiting in queue at the second position or beyond	When customer is waiting in queue at the second position or beyond.
Customer disconnected from	Message displayed to the agent when the customer gets	When customer explicitly closes the browser tab or gets disconnected because

Message trigger	Definition	When to trigger
conversation	disconnected	of network issue.
Holiday message to customer	Message displayed to the customer on holidays	When the customer initiates a conversation on holidays set up for the Live Chat, channel, or queue.
Out of operating hour message to customer	Message displayed to the customer outside of the business hours	When customer initiates a conversation outside of business hours set up for the Live Chat, channel, or queue.
Session ended	Message displayed to the customer when the agent ends the conversation and closes the session	When the agent ends the conversation and closes the session.
Transfer to agent accepted	Message displayed to the customer when the conversation is transferred successfully	When another agent accepts the transfer request.
Offer customer callback	The callback message played for the customer when the wait times are longer than expected	When the customer calls and wait time is long.
Customer callback response	When the customer presses 1 on the call menu, a confirmation message is played to indicate the customer choice.	Customer presses 1 on the call menu. The response to offer customer callback message is played.

Best practices for using automated messages

Use the following best practices when you configure automated messages for the voice channel:

- Make sure that you configure concise messages when you use automated and custom messages because lengthy messages might mean that agents take longer to connect with customers.
- Consider configuring **Greeting Message for Async Channels and Voice** instead of **Agent assigned to a conversation**.
- If you've configured both **Agent assigned to a conversation** and **Greeting Message for Async Channels and Voice**, consider configuring **Greeting Message**

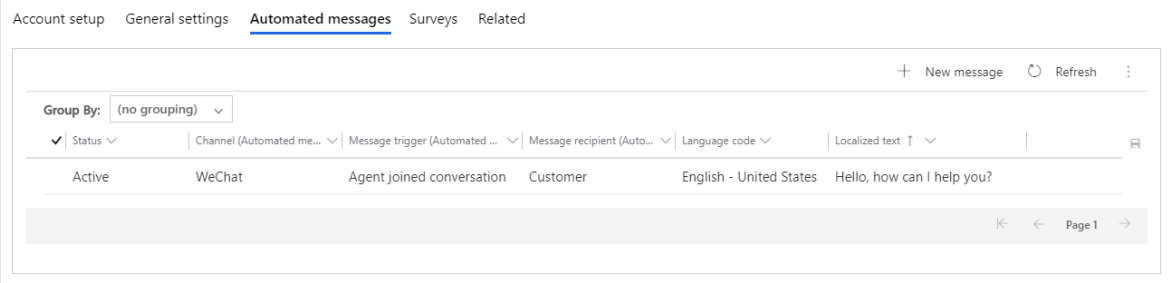
for Async Channels and Voice to avoid the accumulation of messages in the queue.

- Disable messages that announce the average wait times, unless your business requires that customers know this information.

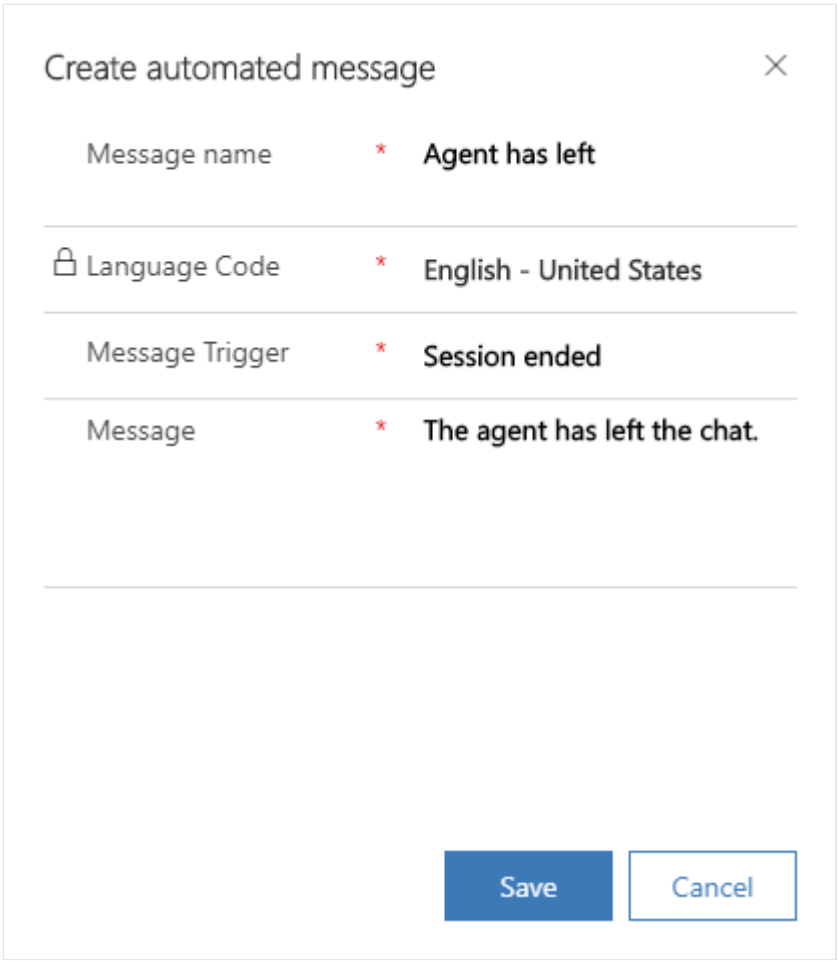
Add custom automated messages in Omnichannel Administration

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

1. In Omnichannel Administration, go to **Channels**, and select the channel you will use to send automated messages. This example uses WeChat.
2. In the list of accounts, open the channel instance for which you want to configure an automated message.
3. Select the **Automated messages** tab, and select **New message**.

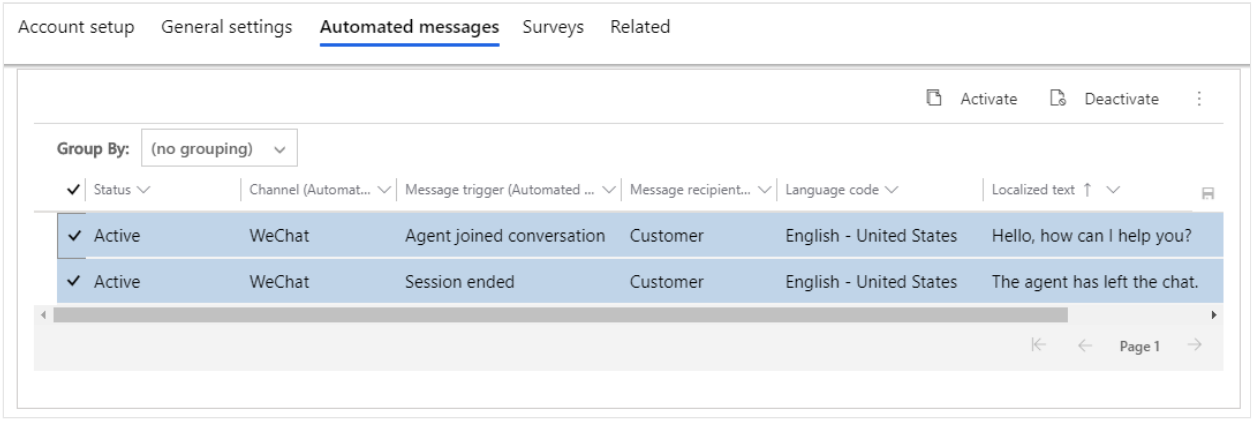


4. Enter the name of your message, select the message trigger, and then type your message. The **Language Code** field is determined by the language set in the **General settings** tab of the channel instance and cannot be modified. The **Message Trigger** field contains the system events that prompt an automated message to be sent.
5. Select **Save**.



The message is added to the list of channel instance-specific messages. To create localized versions of the message, repeat the steps for each language required.

To deactivate messages at the channel instance level, select one or more messages, and select the **Deactivate** button.



Next steps

Add a chat widget

See also

Channels

Create message templates

Article • 05/07/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Message templates enable the one-time creation of reusable messages that can be sent to multiple customers. With message templates, you can maintain high-quality content and avoid spam in the ecosystem. You can save time and personalize the messages by using placeholder values that can be replaced with dynamic content when the message is sent.

To create a message template

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, in **Agent experience**, select **Productivity**.

2. Select **Manage** for **Message templates**.

3. Select **New**, and enter the following details:

   - **Name:** Enter a name.
   - **Channel:** Select SMS.
   - **Default language:** Select a language.
   - **Default text:** Enter the default text for the message.

4. Select **Save**. After saving the template, the **Message template** panel appears.

5. Select **New message** and create a message using localized text in each language that you want to support.

Message templates support the following slugs.

Slug	Description
{FullName{Customer}}	The full name of the customer who initiated the conversation.
{LastName{Customer}}	The last name of the customer.
{NickName{Customer}}	The nickname for the customer.
{FullName{Agent}}	The full name of the agent who is assigned to the conversation.
{FirstName{Agent}}	The first name of the agent.
{LastName{Agent}}	The last name of the agent.
{Nickname{Agent}}	The nickname for the agent.

For more information, see Slugs.

6. Select **Save & Close** to see your localized message appear in the list of message templates.

See also

Configure outbound messaging
Configure an SMS channel for TeleSign
Configure an SMS channel for Twilio
Configure a WhatsApp a channel through Twilio

Configure outbound messaging

Article • 05/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Outbound messaging enables organizations to send messages to their customers through supported channels, based on system-triggered or user-defined events. You can configure message templates for only SMS and WhatsApp channels.

As an administrator, you can do the following tasks:

- Create message templates that can be adopted for outbound messages.
- Configure outbound messages to be sent for events that are triggered for an entity, such as creation of a case.
- Configure outbound messages to be sent manually based on non-system events, such as a shipping delay due to weather.

Prerequisites

The following prerequisites must be met.

- The channel that you want to use must be provisioned in your environment. More information: Provision Omnichannel for Customer Service
- To send outbound messages through SMS, you must configure the SMS channel using Twilio, TeleSign, or Azure Communication Services. More information: Configure an SMS channel for Twilio, Configure an SMS channel for TeleSign, and Configure an SMS channel using Azure Communication Services
- To send outbound messages through WhatsApp, you must configure the WhatsApp channel by using a Twilio account.
- You must have a Power Automate account.

After meeting the prerequisites, you can send outbound messages from your organization by following these steps:

- Set up message templates
- Set up outbound configuration

- Set up a Power Automate flow

Set up message templates

Set up templates to send outbound messages. To create a template, consider the scenarios that require your organization to send outbound messages.

1. Sign in to the Customer Service admin center or Omnichannel admin center app.
2. Create a template for your outbound message.
    - Create a template for SMS.
    - Create a template for WhatsApp.

Set up outbound configuration

You can set up the outbound configuration in the Customer Service admin center or Omnichannel admin center app.

1. Go to one of the apps, and perform the following steps.

    Customer Service admin center

    a. In the site map, select **Customer Settings** in **Customer support**. The **Customer settings** page appears.
    b. In the **Outbound** section, select **Manage**.

    The **Active Outbound Configurations** page is displayed.

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

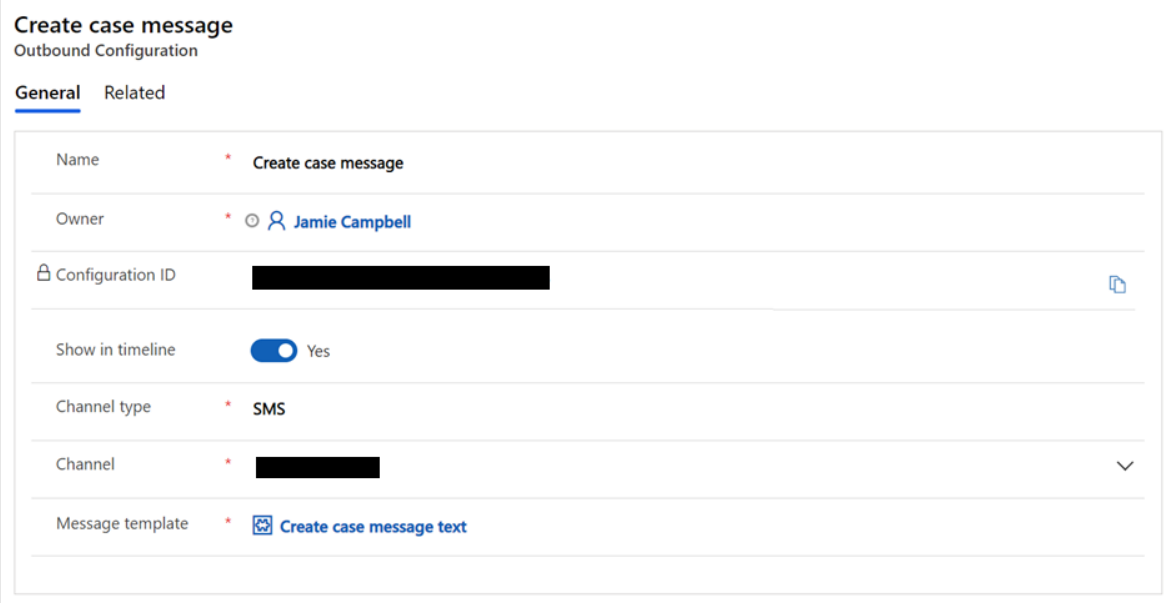
2. Select **New**, and on New Outbound Configuration page, enter the details for the settings mentioned in the following table.

Field	Description	Sample value

Field	Description	Sample value
Name	Name of the case	**Case create message**
Show in timeline	The **Show in timeline** field displays the outbound message in the customer's timeline and activities. Set the toggle to **Yes** for event-based messages that apply to the support journey of a specific set of customers. For bulk messages that will be sent to a high volume of customers, we recommend that you leave this setting at **No**, to conserve resources in your Omnichannel for Customer Service environment and storage.	**Yes**
Channel type	Name of the channel for which the configuration is being set up.	**SMS**
Channel	Channel number	***The preconfigured channel number***
Message template	Name of the template	***Your previously created template***

The **Configuration ID** will be generated when you select **Save**. You'll use it later to identify this outbound configuration when you set up the flow in Power Automate.

You can choose a message template for the outbound message. The default message language and other localized message versions are part of the message template configuration and will apply to outbound messages.



Set up a Power Automate flow

Power Automate provides a low-code platform for workflow and process automation. Outbound messaging in Omnichannel for Customer Service relies on flow-based business logic. For more information, see Power Automate documentation. You can download and import the following sample flows to get started:

- Case Creation flow (.zip file): This template sends an automatic outbound message when a case is created.
- Case Resolved flow (.zip file): This instant-type template sends an outbound message manually to all customers who have a case in the resolved state.

To set up a Power Automate flow

1. Go to one of the apps and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Productivity** in **Agent experience**. The **Productivity** page appears.
   b. In the **Message templates** section, select **Manage**.

   The **Message template view** page is displayed.

2. Select **Flow** at the top of the screen, and then select **Create a flow**.

   or

   Go to https://us.flow.microsoft.com/, sign in to your account and select **My flows**.

3. In Power Automate, set up a flow that aligns with your outbound messaging scenario:

   - **Automated:** Send an automatic message triggered by a system event, for example, case creation.
   - **Instant:** Send a message manually about a non-system event, for example, a shipping delay or a sale on products.
   - **Scheduled:** Send a message at a point in time, at one or more times, or after an amount of time that you specify.

For more information about the current limits and configuration details for flows, see Limits and configuration in Power Automate.

4. Add the action, *incident_msdyn_ocoutboundmessages*. This action enables outbound activity tracking and reporting in Omnichannel for Customer Service.

5. Initialize a ContactList array variable, which will be used as contact information.

6. Get the required customer contact records that contain phone numbers and other contact details, which can be used as slugs in outbound messaging.

7. Fill in the values for the ContactList in the **Append to array variable** template.

Field	Requirement	Description
tocontactid	Required	The customer's phone number that the outbound service uses to send messages.
channelid	Required	The customer's preferred social channel: SMS or WhatsApp.
option	Required	The customer's preference to be contacted by phone. This field can be set to **true** or **false**.
locale	Chosen by default	Enable dynamic message languages, by replacing the default variable with a locale column reference, such as the customer's preferred language. If the locale value is missing, the fallback locale in the omnichannel message template will be applied.
context items	NA	Contains values to be processed with individual messages as they're sent.
entityrelationshipname	Not required	This field refers to the **ActivityRelationship** that was previously defined. Although this field isn't required, it's essential for being able to track outbound activities in the timeline. So, if **show in timeline** in the outbound configuration is set to **Yes**, this field will have to be added to the flow for it to work.
CustomerName	Required	The name of the customer. This value isn't case-sensitive and can throw an error if the customer name values are different.
CaseName	Required	The name of the case.

8. In the **Perform an unbound action** window, you'll need the outbound message configuration ID that you generated. When you add the ID to the *msdyn_ocoutboundconfigurationid* field, the field references the correct outbound configuration for a flow run.

9. Add the output from the compose action.

When the customer responds back to the outbound messages, the customer's message will be treated like any other incoming conversation that exists today in Omnichannel for Customer Service. The conversation will be routed and assigned to an agent, and the agent will be able to respond back to the customer.

> **Note**
>
> Outbound messaging imposes limits of 100 contacts per request and 30,000 requests per org per hour. Where higher loads are expected, we recommend that you implement batch processing logic in flows to limit contacts per request to 100.

Video

Outbound messaging in Omnichannel for Customer Service

To view more videos about Omnichannel for Customer Service, go to Videos.

See also

Create message templates
Channels in Omnichannel for Customer Service
Configure an SMS channel for TeleSign
Configure an SMS channel for Twilio
SMS FAQ

Create and manage data masking rules

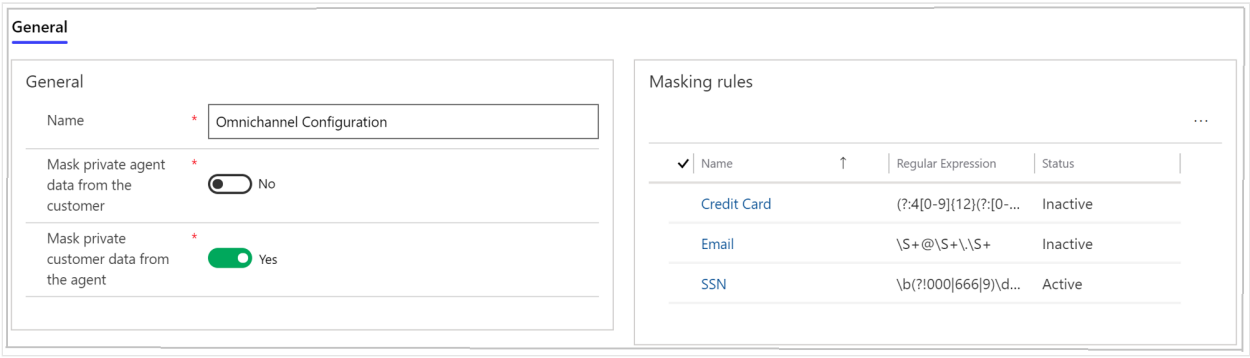
Article • 06/09/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

Use data masking to block sensitive data such as credit card information, social security number (SSN), or even profanity in a conversation. You can create a masking rule and define a regular expression to identify the sensitive information and replace it with the masked characters. Any text that's masked in a conversation will also be masked in the conversation transcript. Data masking works for chat and asynchronous channels.

Masking rules can be configured to apply to messages sent by a customer, an agent, or both. You must make sure that the masking rules you want applied are set to **Active**; otherwise, they won't apply to the selections you make.



You can choose to:

- **Mask private agent data from the customer**: Data the agent sends is masked for both the customer and agent for live chat and async channel messages.
- **Mask private customer data from the agent**: Data the customer sends is masked for both the customer and agent for live chat, but only for the user interface of the

agent when using async channels.

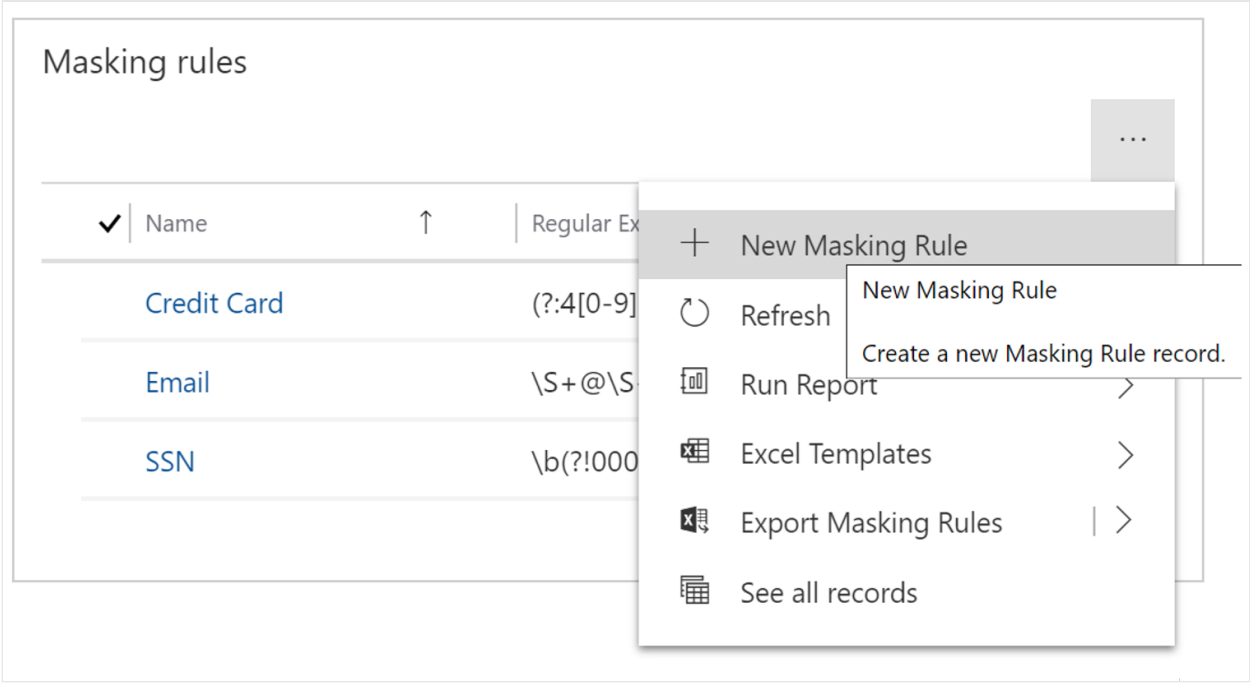
The following masking rules are provided out of the box:

- **Credit Card**: Masks the credit card number, if provided in a message.
- **Email**: Masks the email address, if provided in a message.
- **SSN**: Masks the SSN, if provided in a message.

As an administrator, you can delete or modify the out-of-the-box masking rules and create new masking rules.

> **Note**
>
> - Only an administrator can access and edit data masking rules.
> - Only 10 data masking rules, including the rules provided out of the box, can exist in Omnichannel for Customer Service.

Create a data masking rule



1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center)

   - In the site map, in **Agent experience**, select **Productivity**.

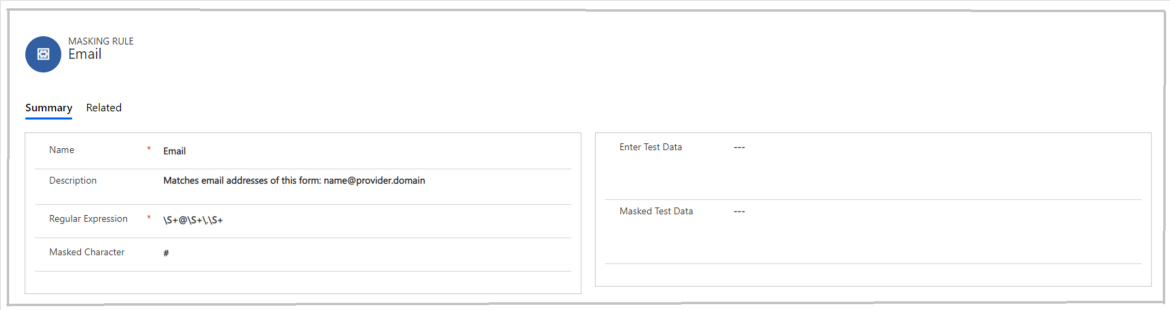
2. Select **Manage** for **Data masking**.

3. In **Masking rules**, select **New Masking Rule**.

4. On the **New Masking Rule** page, provide the following information:

    - **Name**: The name of the masking rule.
    - **Description**: An optional description of the masking rule.
    - **Regular expression**: A regular expression to identify the data to be masked.

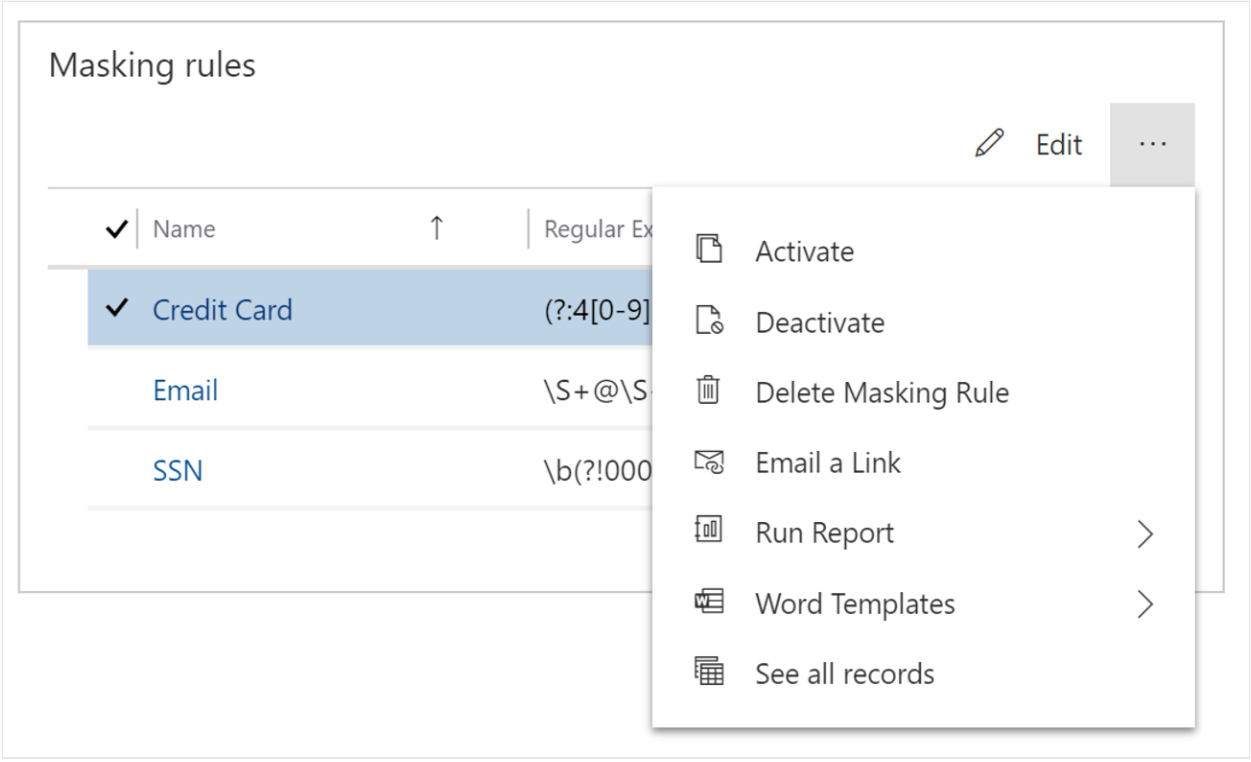
5. To test the data masking as defined by the specified regular expression, enter a value in the **Enter test data** field. The masked value is displayed in the **Masked test data** field. By default, the number sign (#) is used to mask sensitive data.



6. Select **Save**.

Manage data masking rules

After a masking rule is created, you can edit, activate, deactivate, or permanently delete it.



1. Under **Masking rules**, select the ellipsis to see the options for managing an existing masking rule.

2. To activate, deactivate, or delete a masking rule, select the rule, and then select the appropriate action from the list.

Productivity pane overview

Article • 02/11/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

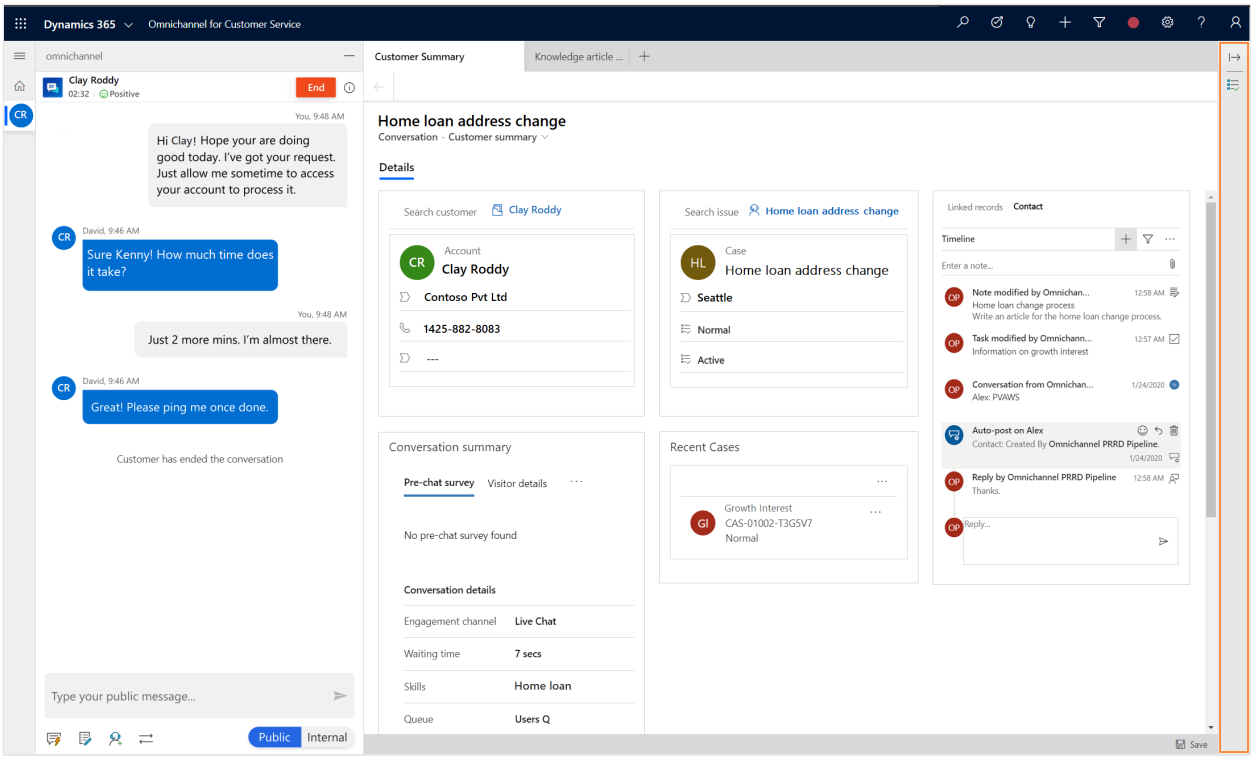
The productivity pane in Customer Service workspace and Omnichannel for Customer Service enables you to display knowledge search, agent scripts, and smart-assist cards in a unified view. Configure knowledge search, agent scripts, and smart-assist cards so these agent guidance tools will appear in Customer Service workspace and Omnichannel for Customer Service.

If you have recently updated the Omnichannel Administration app, you will no longer enable or disable the productivity pane in the app. On upgrade, an app profile would have been created for your environment through Power Apps. The app profile contains your existing settings and the ability to toggle each of the agent guidance components that are available in the productivity pane:

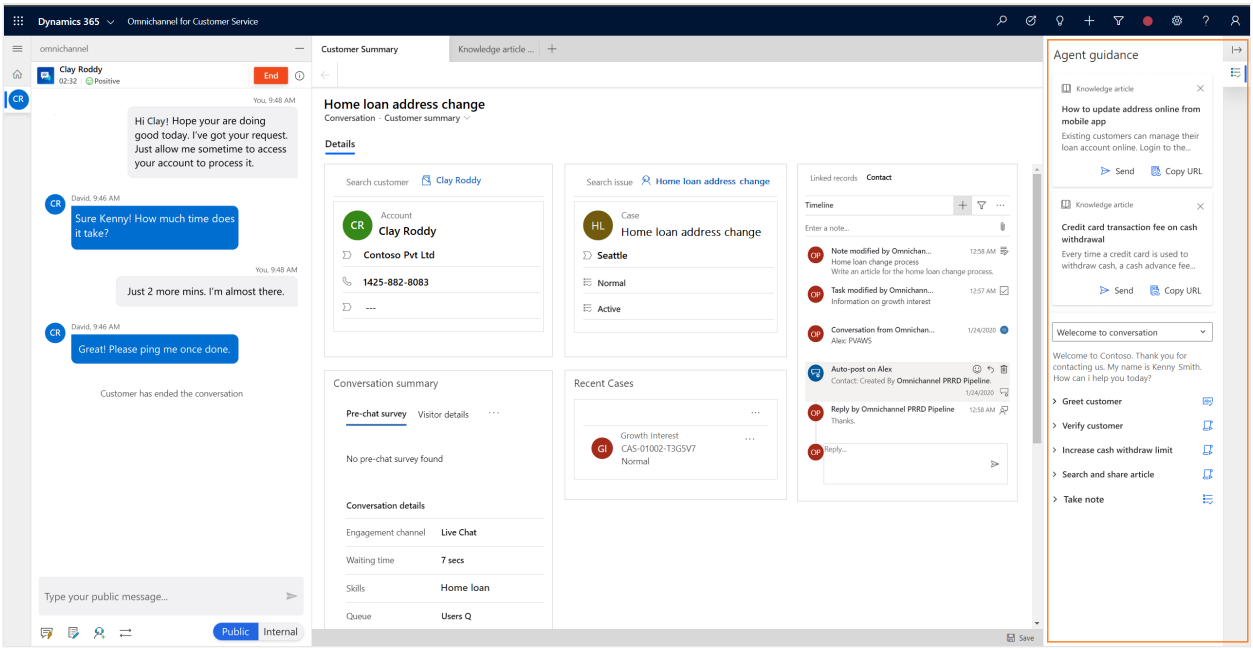
- Knowledge search
- Smart assist
- Agent scripts

You can set the productivity pane in collapsed mode or expanded mode, as shown in the following illustrations.

Collapsed mode



Expanded mode



See also

[App profile manager]

Create an app profile

Article • 02/01/2023

> **ⓘ Important**
>
> With the release of the Customer Service admin center app that consolidates admin experiences across the Customer Service suite, we announce that the following admin experiences are deprecated and no longer supported after April 2023.
>
> - Service Management area in the Customer Service Hub app
> - Omnichannel admin center
> - **App profile manager:** Is removed in April 2023.
>
> Also, starting in October 2022, the Omnichannel admin center and the service management area in Customer Service Hub will be hidden by default in newly created organizations and environments. You have the option to bring them back, but we recommend that you start using the Customer Service admin center app to perform tasks like manage cases, and configure unified routing, channels, and agent experience profiles. More information: **Get started with Customer Service admin center**

Perform the following steps to create an app profile:

1. Sign in to Power Apps.
2. Select the environment in which you want to create the app profiles.
3. Do one of the following:

    - On the **Home** page, go to **Your apps** section.
    - In the left pane, select **Apps**.

4. Select **More commands** in **Omnichannel for Customer Service** or **Customer Service workspace**, and then select **App profile manager** on the menu that appears.
5. In the left pane, select **App profiles**.
6. On the **App profile manager** page, select **New profile**.
7. On the **New profile** pane, specify the following:

    - **Name:** The app profile name.
    - **Unique name:** A unique identifier in the *<prefix>_<name>* format.

        > **ⓘ Important**

The following are required for the unique name:

- The prefix can only be alphanumeric and its length must be between 3 to 8 characters.
- An underscore must be used between the prefix and name.

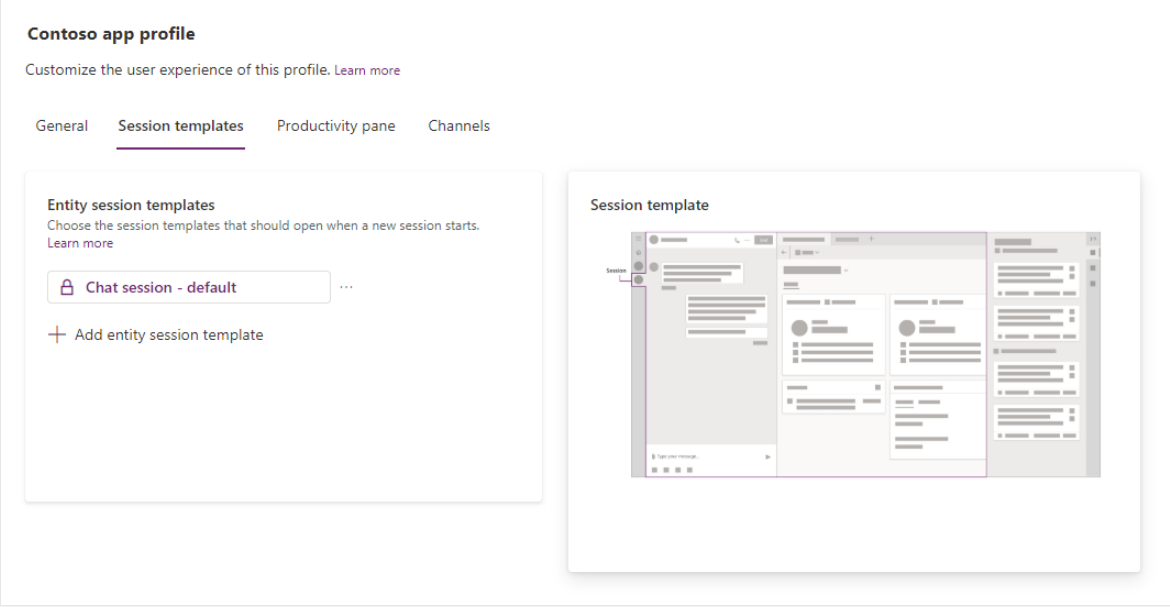
- **Description:** A description for the profile.

Assign templates and enable productivity pane and channels

For an app profile, you can add only one session template for each entity type. Typically, you'll add one session template for each entity type, such as one each session template for accounts, contacts, and cases.

The settings that you enable for the app profile will be available for agents and supervisor only when you configure the corresponding templates and settings in the Customer Service Hub or Omnichannel admin center app. For example, channels must be provisioned in Omnichannel for Customer Service and channel instances must be configured.

1. In the **App profiles** section, select the app profile to which you want to assign templates.
2. On the **Session templates**, select **Add entity session template**.
3. Search for the template you want to add and select it. Make sure that the selected template is based on **Entity** type. More information: Manage session templates



4. Do the following on the **Productivity pane** tab:

a. If you want to enable productivity tools, set the toggle to on for **Turn on productivity pane**.
b. Select the default mode as collapsed or expanded.
c. In the **Productivity tools** section, set the toggle to on for the following:

- **Smart assist tool configuration**
- **Knowledge search tool configuration**
- **Agent scripts** to allow access to smart assist configuration and agent scripts.

5. On the **Channels** tab, set the toggle to on for **All active channels**. The channels configured in Omnichannel for Customer Service will be available for the user to whom the profile is assigned.

> ⓘ Note
>
> The toggle for channels will be enabled in the out-of-the-box app profile for Omnichannel for Customer Service.

6. To add a third-party channel provider, in the **Voice channels** section, select **Add channel providers**, search for the configured channel, and select it.

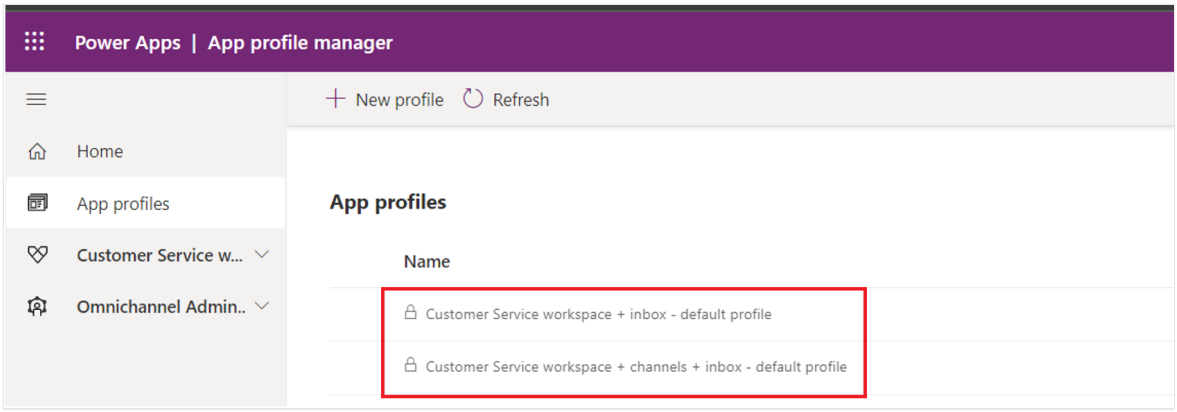
7. If a channel doesn't exist, select **Create a new channel provider in Unified Interface**. The channel configuration page opens on a new tab. More information: Configure channel provider using app profile manager

> ⓘ Note
>
> - Only telephony or voice channels are supported.
> - A number of voice channel providers can be configured at a time.

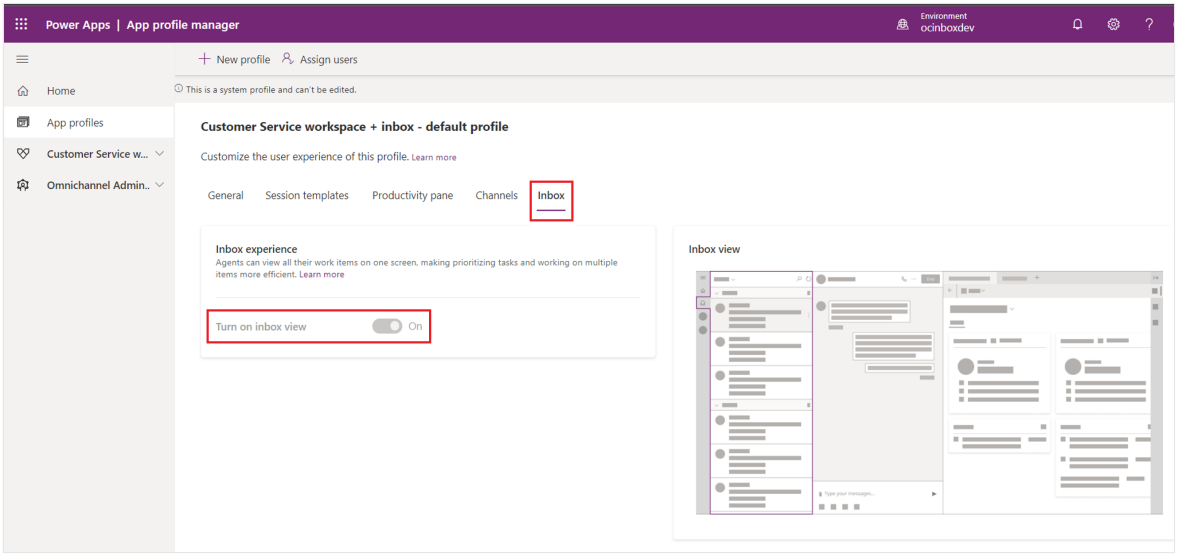
Configure the inbox view

For an app profile, you can enable the inbox view in the Customer Service workspace or Omnichannel for Customer Service apps. From the inbox, users can view their conversations and cases.

1. On the **App profiles** page, select the profile for which you want to enable the inbox.

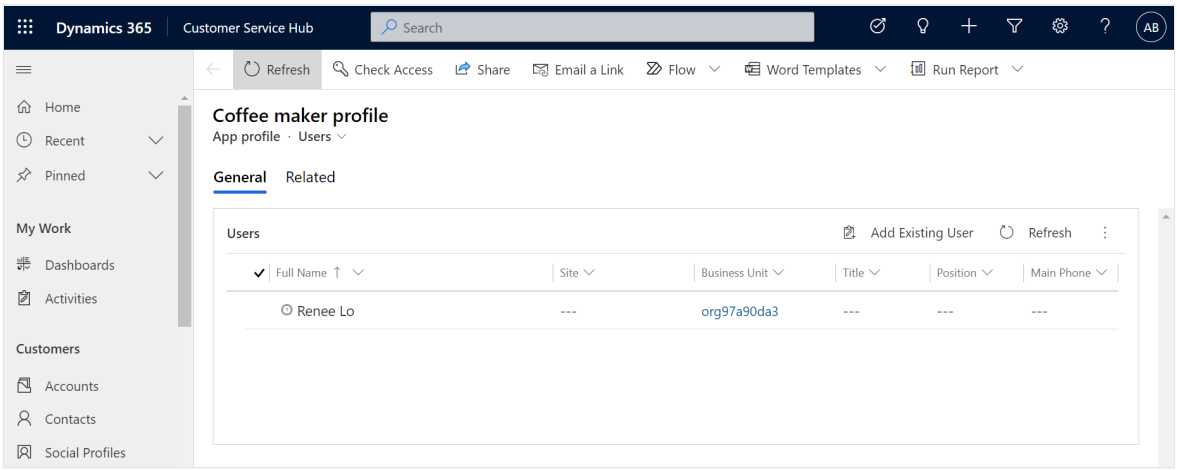


2. Select the **Inbox** tab, and then toggle **Turn on inbox view** to **On**.



Assign profiles to users

1. On the **App profiles** page, select the profile that you want to assign to a user.
2. On the <***profile_name***> page, select **Assign users** on the command bar, and select **OK** on the message dialog box. The profile opens on a new tab.



3. On the **General** tab, select **Add Existing User**.
4. On the **Lookup Records** pane, search and select the user.

> **Note**
>
> You can select **Assign users** on the <***profile_name***> page to view the list of users who have been assigned to the profile.

Default profile assignment

When users are assigned roles corresponding to Customer Service workspace or Omnichannel for Customer Service, the default app profiles are assigned as follows.

- **Customer Service workspace**: Users with the CSR Manager and Customer Service Representative roles.
- **Omnichannel for Customer Service**: Users with the Omnichannel administrator, Omnichannel supervisor, and Omnichannel agent roles.

More information: Roles and privileges associated with app profile manager

See also

Get started with Customer Service admin center
Configure agent experience profiles
Manage session templates
Configure channels
Manage agent scripts

Create quick replies

Article • 05/26/2023

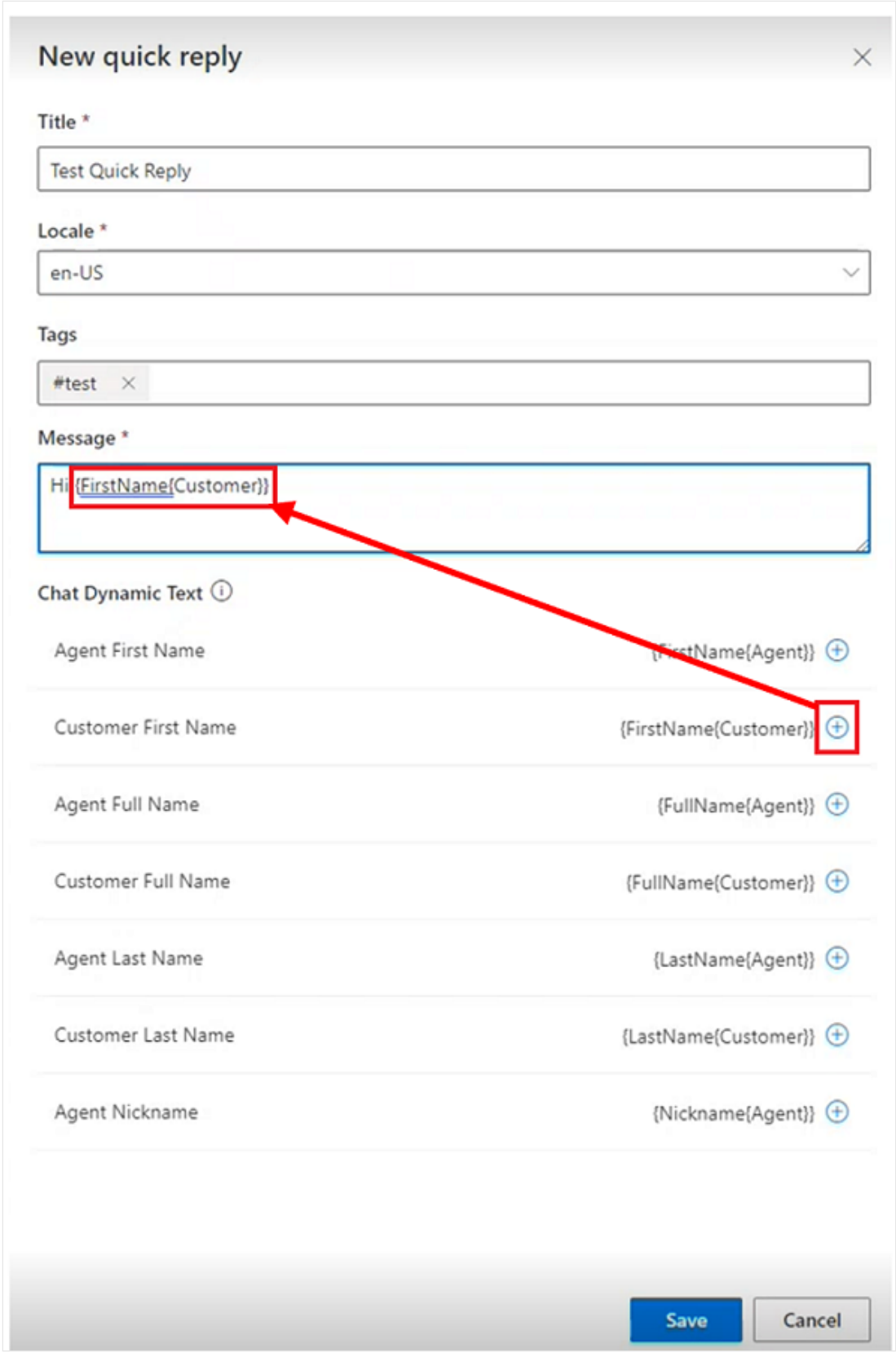
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Quick replies are predefined messages that can be created for agents to quickly respond to common questions from customers. For information about the agent's quick reply experience, see Send quick replies.

1. In the Customer Service admin center site map, in **Agent experience**, select **Productivity**, and then select **Manage** for **Quick replies**.
2. To create a quick reply, select **New**, or to edit an existing quick reply, select the name of the quick reply.
3. Provide or change the following information:
    - **Title:** Enter the title of the message.
    - **Locale:** Specify the language of the message.

      > **Note**
      >
      > Customer Service admin center doesn't localize quick replies. To provide quick replies in multiple languages, create a separate quick reply for each language and select its corresponding locale.

    - **Message:** Enter the text of the message. To use chat dynamic text (also called slugs), select the plus icon next to the name of the dynamic text slug you want to use. The dynamic text populates in the **Message** field.

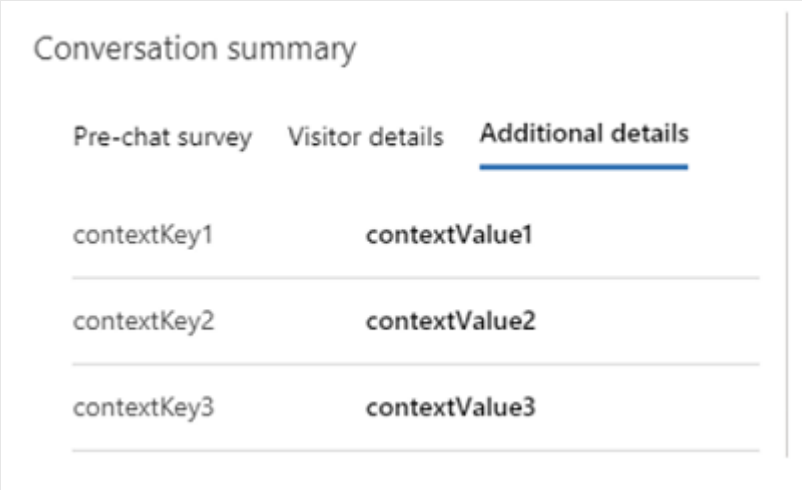


The **Message** field lets you quickly add the following chat dynamic text (slugs).

Chat dynamic text (slug)	**Description**
{FullName{Customer}}	The full name of the customer who initiated the conversation.

Chat dynamic text (slug)	Description
{FirstName{Customer}}	The first name of the customer.
{LastName{Customer}}	The last name of the customer.
{FullName{Agent}}	The full name of the agent who's assigned to the conversation.
{FirstName{Agent}}	The first name of the agent.
{LastName{Agent}}	The last name of the agent.
{Nickname{Agent}}	The nickname for the agent.

If you've defined a context key, you can create a quick reply that contains dynamic text that corresponds to that context key in the following format: {OCContext.contextKey1}, where "contextKey1" in the syntax is a placeholder for the predefined custom context field in the conversation. For example, {OCContext.OrderID} would be a context key that populates the message field with the Order ID for a record. More information: Add context variables and setContextProvider.



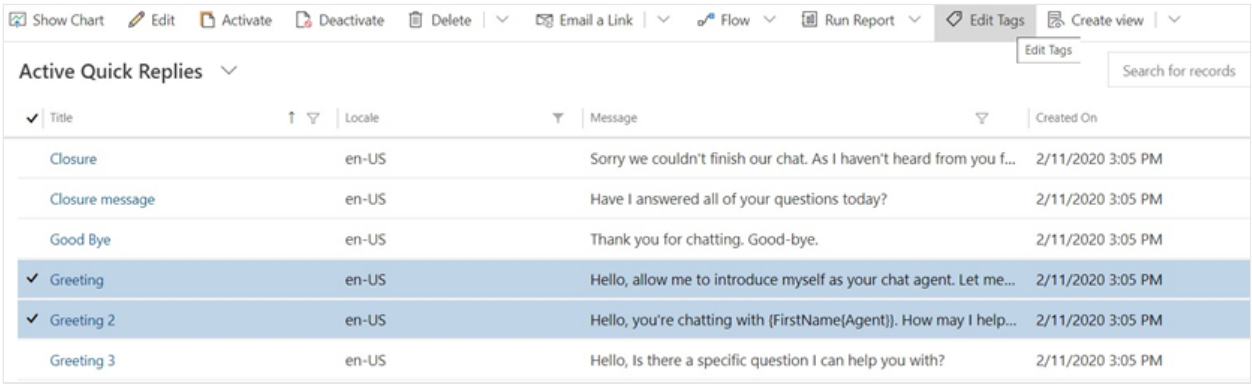
4. Select **Save**.

Create or edit tags for common categories of quick replies

Quick replies can be classified and tagged into categories. The categorization capability can also be used to group quick replies into logical chunks that represent key conversational states for agents. These logical chunks help agents select appropriate messages that correspond to customer issues.

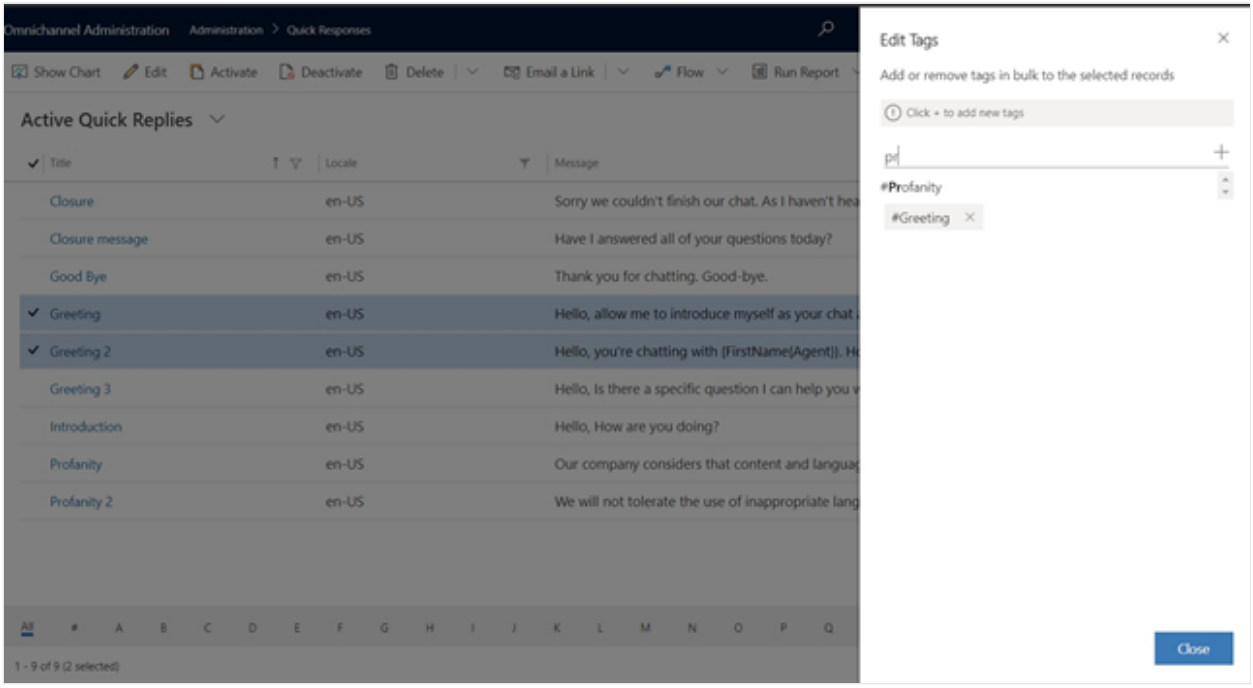
1. In the Customer Service admin center site map, in **Agent experience**, select **Productivity**, and then select **Manage** for **Quick replies**.

2. Select two or more quick replies for which you want to create a tag, and then select **Edit**.



The **Edit records** dialog appears.

1. In the **Tags** field, start typing the tag you want to create. If it already exists, it will appear in a list below the field. If it doesn't appear, select + (plus sign) to add it.



1. After you're done, select **Close**.

Associate quick replies with a workstream

For organizations with diverse lines of businesses, agents will send a variety of messages, depending on their area of expertise. Administrators can determine which quick replies are necessary for different groups of agents to use. Administrators can

associate quick replies with workstreams to show agents only those quick replies that apply to them. If no workstream is associated, the quick reply is available for all agents.

1. In the site map of Customer Service admin center, in **Agent experience**, select **Productivity**, and then select **Manage** for **Quick replies**.
2. Select a quick reply from the list.
3. In the **Workstreams** section, select **Add Existing Work Stream**.
4. Select the workstream from the list of records, and then click **Add**.

   The workstream appears in the list.
5. Select **Save**.

   If you select the workstream in the list, you can view the workstream record, and see the quick replies associated with the workstream.

Availability of quick replies and language settings

The quick replies that the agents will see are determined by the following parameters:

- The language mapped to the channel instance
- The language configured in the agent's personal settings
- The workstream the quick reply is mapped to

For example, when you set up a live chat widget or Facebook page, the quick replies will be available in the language that is configured for the chat widget or Facebook page. Then, when you associate the chat widget with a queue containing agents, the agent-specific language setting, if configured, will determine the language in which the quick replies will be available to the agents. The agents will see the quick replies mapped to the workstream that is associated with the channel with other quick replies.

See also

Add a chat widget
Configure a pre-conversation survey
Create and manage operating hours
Create chat authentication settings
Embed chat widget in Power Apps portals
Language settings for agents

Manage rich messages

Article • 10/11/2022

Some channel apps such as Apple Messages for Business support a set of custom rich messages. Rich messages contain information that can be used to generate interactive content and experiences that take place within that app.

By creating and publishing channel-specific rich messages, your organization's customer support team can send them to customers, and their content can be used when designing automated experiences. For information about using rich messages in Omnichannel for Customer service, see Rich messages in conversation control.

Create rich messages for Apple Messages for Business

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Productivity** in **Agent experience**.
   b. On the **Productivity** page, select **Manage** for **Rich messages**.

2. Select **New**, and then enter the following information:

   - **Name**: A descriptive name that'll be used by agents to search for rich messages.
   - **Locale**: The language of the rich message. Rich messages are filtered by locale within agent sessions.
   - **Type**:
     - Apple Pay
     - Authentication
     - Custom JSON
     - Forms
     - List Picker
     - Suggested Reply
     - Time Picker
     - Video Rich Link
     - Website Rich Link

- **Tags**: A message type tag is automatically added to each rich message. In addition to the type tag, any relevant search tags can be added to the rich message. These tags will help agents identify the correct rich message when they search for rich messages.
- **Allow agents to configure**: Some rich message types allow agents to update the contents before sending to customers. By enabling configurations, agents can make single-use customizations, which don't affect the original rich message made here. Agent editing can be enabled for the following rich message types:
  - List picker
  - Suggested reply
  - Time picker
  - Video rich link
  - Website rich link

3. Select **Create**.

4. Begin building your rich message within the rich message designer. Save your work at any time by selecting **Save** at the top of the designer. For more information about building each rich message type, select the type to learn more:

   - Apple Pay
   - Authentication
   - Custom JSON
   - List Picker
   - Suggested Reply
   - Time Picker
   - Video Rich Link
   - Website Rich Link

Publish rich messages

For agents to send a rich message in conversations, the message must first be published.

1. Complete the steps for building your rich message, as defined above.

2. At the top of the designer page, select **Publish**. If there are any missing fields, the designer will highlight them in red, and won’t allow the rich message to be published.

3. You can confirm that your rich message was successfully published in two ways:

- The **Publish Save** button will no longer appear above the designer.
- The status will show as **Active** within the designer and the rich messages settings page.

Update a published rich message

You can update rich messages that are published and active.

1. Select the rich message and open it in the designer.
2. Fill in all required fields, and then select **Publish**. This step ensures that rich messages that are missing required fields don't become active.

Workstream association

Workstream association for rich messages behaves similarly to quick replies today. By default, an active rich message will be available to use across all Apple Messages for Business workstreams.

After a rich message has been associated with one or more specific workstreams, it will no longer be available to use in all other workstreams.

To associate rich messages with a workstream, complete the following steps:

1. Within a workstream, expand the **Advanced settings** panel by selecting **Show advanced settings**.
2. Within the advanced settings, navigate to **Rich messages**.
3. Select **Add rich messages**. All existing rich messages are displayed.
4. Select one or more rich messages from the list, then select **Add**. Any associated rich messages will appear within the **Rich messages** table in **Advanced settings**.
5. To edit a workstream's rich messages, select **Edit**, and then add or remove rich messages as required.
6. To add more rich messages, select **Add**. Select more rich messages, and then select **Add**. They should now appear in the list of rich messages.
7. To remove rich messages, select one or more within the table, and then select **Remove**. The removed rich message will no longer appear in the list.

Apple Pay

Properties

messageTitle

Text displayed in the message bubble.

Type: `string` - Required: Yes

imageURL

URL linking to the image displayed in the message bubble.

Type: `string` - Required: No

currencyCode

The three-letter ISO 4217 currency code for the currency used in the payment request.

Type: `string` - Required: Yes

requiredBillingContactFields

The customer's billing contact fields that are needed to process the transaction.

Type: `requiredBillingContactFields[]` - Required: Yes - Allowed values: - "email" - "name" - "phone" - "phoneticName" - "post"

requiredShippingContactFields

The customer's shipping address information. Include this value only if the purchase must be shipped.

Type: `requiredShippingContactFields[]` - Required: No - Allowed values: - "email" - "name" - "phone" - "phoneticName" - "post"

shippingMethods

An array of shippingMethods. Omnichannel currently supports only one shipping method per payment request. If more than one shipping methods are included, only the first will be used.

Type: `shippingMethods[]` - Required: No - Allowed values: - "shippingMethod"

shippingMethod

Describes the shipping method, which contains the amount, detail, label, and identifier properties.

amount

A non-negative value associated with this shipping method.

Type: `string` - Required: Yes

identifier

Internally defined, unique value used to identify this shipping method.

Type: `string` - Required: Yes

label

Description of the shipping method.

Type: `string` - Required: Yes

type

Property to represent whether the line item amount is final or pending.

Type: `string` - Required: Yes - Allowed values: - "final" - "pending"

total

Describes the final amount of the Apple Pay request. It contains the amount, label, and type properties.

amount

The monetary amount of the Apple Pay request. This value must be greater than zero.

Type: `string` - Required: Yes

label

The friendly business name customers will see when the charge appears on statements. For example, "Contoso Coffee".

Type: `string` - Required: Yes

type

Property to represent whether the Apple Pay request's total amount is final or pending.

Type: `string` - Required: Yes - Allowed values: - "final" - "pending"

Example

```
{
    "messageTitle" : "Purchase your Contoso Barista Home",

    "imageUrl" : "https://images-us-
prod.cms.commerce.dynamics.com/cms/api/qbvttlwqcm/imageFileData/search?
fileName=/Products%2FSP-
DCM1008_000_001.png&w=315&h=315&q=80&m=6&f=jpg&cropfocalregion=true",

    "imageStyle" : "large",

    "currencyCode" :"USD",

    //Billing contact information requested during purchase
    "requiredBillingContactFields" : [
        "post",
        "email",
        "phone",
        "name",
        "phoneticname"
    ],
    //Only required when customer's purchase must be shipped
    "requiredShippingContactFields" : [
        "post",
        "email",
        "phone",
        "name",
        "phoneticname"
    ],
    "shippingMethods" : [
        {
            "amount" : "0.00",
            "detail" :"Available within an Hour",
            "label" : "In-Store pickup",
            "identifier" : "in_store_pickup"
        }
    ],

    "lineItems" : [
        {
            "label" : "Barista Home Espresso Maker",
            "amount" : "899.00",
            "type" : "Final"
        },
        {
            "label" : "Contoso Customer Discount",
            "amount" : "-898.99",
            "type" : "Final"
        }
    ],

    "total" : {
        "label" : "Label",
```

```
        "amount" : "0.01",
        "type" : "Final"
    }
}
```

Limitations

Description	Limitation
Merchant country	Payment processing for merchants in China and Saudi Arabia, country codes CN and SA, respectively, is not supported in Omnichannel.
Merchant capabilities	EMV – Omnichannel does not currently support China Union Pay transactions.
Supported networks	The list of supported networks is limited to: - American Express - Discover - Mastercard - Visa

Authentication

Properties

receivedmessage

Text displayed in the message alongside the “sign in” button.

Type: `string` - Required: Yes

replymessage

Text displayed to the customer once they have successfully authenticated.

Type: `string` - Required: Yes

Example

```
{
    "receivedmessage":"Please sign-in",
    "replymessage":"You're signed in"
}
```

Limitations

Description	Limitation
Message contents	Images aren't currently supported for authentication.
Agent	Authentication request-type rich messages don't currently support agent configuration.

Custom JSON

Properties

bid

A string identifying the iMessage extension that the user interacts with while using Messages. The bid value format is `com.apple.messages.MSMessageExtensionBalloonPlugin:team-id:extension-id`. Replace `team-id` and `extension-id` with your Apple Developer team and extension IDs.

Type: `string` - Required: Yes

URL

A URL string containing data that the Messages app sends to the iMessage app.

Type: `string` - Required: Yes

Example

```
{   "bid":"com.apple.messages.MSMessageExtensionBalloonPlugin:{team-id}:
{ext-bundle-id}",
"URL":"?name=WWDC%20Goodies&deliveryDate=09-06-
2017&destinationName=Contoso%20Coffee%20Redmond&street=1%20Microsoft%20Way&s
tate=WA&city=Seattle&country=USA&postalCode=98052&latitude=47%2E6395&longitu
de=%2D122%2E1281&extraCharge=15%2E00"
}
```

Forms

Survey-level properties

1. When a form rich message is created, you'll see the form level properties panel and builder. First, provide a title by selecting **Form Title** in the builder, or **Title** in the properties panel. You can also provide information for the following optional fields, which appear as part of the form's opening page:

    - **Header** (Optional): A large central header with a short text greeting or call to action.
    - **Image URL** (Optional) The image displayed to customers within the list picker's message and customer response message. Image URLs must be a valid image type. Videos and GIFs aren't supported.
    - **Start button**: You can change the label from the default string, but it can't be left blank.

2. The following form behaviors may be configured by navigating to the **Behavior** section in the property panel:
   a. By default, form responses are shown to the customer before they submit responses. This summary can be removed by deselecting **Show summary page**.
   b. Form responses can be hidden from live agents, which may be helpful when designing automated processes to handle sensitive information. When **Hide customer responses in chat** is toggled on, agents will be unable to see any customer responses within the form. Privacy cannot be toggled per question.

3. The **Outbound message** properties determine the appearance of the message bubble containing the form. The outbound message may contain the following elements:
   a. **Message title**: The main text that informs the customer of what type of content the message contains. It could be the full or shortened title of your form.
   b. **Message description** (Optional): This text appears below the message title. It can be used as a call-to-action or to provide more context not included in the message title.
   c. **Image URL** (Optional): The image displayed to customers within the list picker's message and customer's response message. Image URLs must be a valid image type, and do not support videos or GIFs.

4. To begin adding questions, select one of the question types from the **toolbox** located between the properties panel and builder. Each question will contain required **Title** and optional **Header** fields, in addition to type-specific configurations. Apple Messages for Business forms support the following question types: Single input, multiline input, single-select, multi-select, dropdown picker, and date picker.

5. A form can contain no more than 10 questions, and should be completable without needing to leave the messages application. While building a form, select **Save** to keep your changes. An unpublished form can be saved with missing fields. Changes made to a published form may only be saved if rich message has all required fields filled.

6. New forms will be available for agents to use once they are published. To publish a new form, select **Publish** at the top of the page. To confirm that the form is published, confirm that its status displays as **Active**.

Single input question

Single input questions are a short-answer free response style question. This question type is good for collecting information like name, contact information, and numbers. These questions are limited to a maximum of 30 characters. For longer responses, see the multiline input question type.

1. Provide a **Question title**, optional **Header** text, and use the **Required** toggle to control whether the question may be left unanswered.

2. The **Input** type may be changed from the default **Text** type. Changing the input type will change the input keyboard on iOS devices. The keyboard input field won't verify whether the customer response matches the keys that are available on the keyboard. To limit customer responses and validate formatting, use the **Regular expression** field. The type options and their impact on input are as follows:

    - **Text** (Default): Default keyboard
    - **Name**: Default keyboard and name autofill suggestion
    - **Url**: URL keyboard and URL autofill suggestion
    - **Phone**: Phone pad keyboard and phone number autofill suggestion
    - **Email**: Email keyboard and email address autofill suggestion
    - **Number**: Numbers and punctuation keyboard

    > ⓘ **Note**
    >
    > Autofill suggestions are generated by Apple from the customer's Apple ID contact information, which isn't shared in forms responses.

3. The **Input place holder** value appears in the empty textbox to provide example data or relevant information. If no place holder value is provided the form will automatically set the place holder value to “Required” or “Optional” based on your selection in step 1.

4. The **Label** is an optional value that appears beside the text field and can serve as another prompt. For a question titled “What is your name?” the label might be set to “Name”.

5. A single input can have a **Maximum length** between 1 and 30 characters. By default, the maximum length is 30.

6. The **Prefix** value can be used to automatically add the first characters in an answer. For example, when asking for a LinkedIn profile link, the prefix might be set to “https://www.linkedin.com/in/”, so that the person completing the form would only need to type their specific information.

7. The **Regular expression** is a Regex expression used to validate the customer response. The regex is used to validate customer responses on their device to ensure they are providing correctly formatted information. For example, regex can be used when asking for an email address.

Multiline input question

Multiline input questions are a long-answer, free-response style question. This question type is good for collecting customer feedback, explanations, and responses that need line breaks. These questions are limited to a maximum of 300 characters. For shorter responses that support different iOS keyboards see the single input question type.

1. Provide a **Question title**, optional **HeaderI** text, and use the **Required** toggle to control whether the question may be left unanswered.

2. The **Input place holder** value appears in the empty textbox to provide example data or relevant information. If no place holder value is provided, the form will automatically set the place holder value to “Required” or “Optional” based on your selection in Step 1.

3. The **Regular expression** is a regex expression used to validate the customer response. The regex is used to validate customer responses on their device to ensure they are providing correctly formatted information. For example, regex can be used when asking for an email address.

4. A single input may have a **Maximum length** between 1 and 300 characters. By default, the maximum length is 300.

Single-select question

Single-select questions can be used to quickly select a single option from a set of two or more choices. Each choice can support an image. This question type is good for choosing between products and choices, simple triage questions, and any single-select question with a limited number of choices. For multi-select questions that support images, see the multi-select question type, or for single selection questions with ten or more choices, see the dropdown picker question type.

1. Provide a **Question title** and an optional **Header** text.

2. Under **Choices**, you can add each of your options. We recommend that the number of choices is between two and 10 or fewer. Each choice has the following fields:

   a. **Value**: The true identifier for a choice. This value is what appears in the conversation control when a customer selects a choice. By default, the value is also used as the text that is shown to customers. However, when working in multiple languages or listing products, you might prefer to show an agent the product reference number and product name.

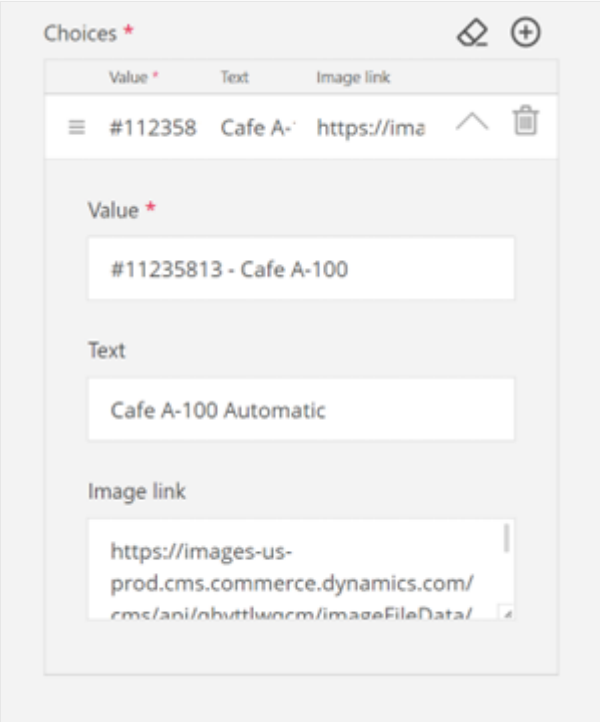
   b. **Text** (Optional): The text is what the customer will see when viewing the question. By default, this text will match the Value. Changing the **Text** content can allow you to localize selection questions without changing what the agent sees in the response.

   c. **Image link** (Optional): The image displayed to customers within the list picker's message and customer's response message. Image URLs must be a valid image type, and do not support videos or GIFs.

   For example, let's say we want to ask a Contoso customer to select the model of expresso maker that they own. The agent will need the model number, but a customer might only know the model by its name or image. In this instance, we would provide the following content:

Type	Description	Notes
Value	#11235813 Cafe A-100	The agent will see this text.
Text	Cafe A-100 Automatic	The customer will see this text.

Type	Description	Notes
Image link	https://contoso.com/[image].jpg	The customer will see this image.



3. To add more choices, select the + icon within the properties panel or builder. You can rearrange the choices by dragging them up or down while selecting the handle button to the left of each choice. You can remove a choice by selecting the delete button. To remove all choices, select the erase icon next to the + icon at the top of the list.

Multi-select question

Multi-select questions can be used to quickly select one or more options from a set of two or more choices. Each choice can support an image. This question type is good for selecting from a subset of choices, simple triage questions, and any multi-select other multi-select question types. For single selection questions that support images, see the single-select question type, or the dropdown picker question type for single-select questions with a large set of choices.

1. Provide a **Question title** you may also include an optional **Header** text.

2. Under **Choices**, you can add each of your options. We recommended that the number of choices is between two and 10 or fewer. Each choice has the following fields:

   a. **Value**: The true identifier for a choice. This value is what appears in the conversation control when a customer selects a choice. By default, the value is also

used as the text that is shown to customers. However, when working in multiple languages or listing products, you might prefer to show an agent the product reference number and product name.

b. **Text** (Optional): What the customer will see when viewing the question. By default, this text will match the Value. Changing the Text content can allow you to localize selection questions without changing what the agent sees in the response.

c. **Image link** (Optional): The image that is displayed to customers within the list picker's message and customer's response message. Image URLs must be a valid image type, and do not support videos or GIFs.

For an example of the difference between **Value** and **Text**, see the section on single-select question types.

3. To add more choices, select the + icon within the properties panel or builder. You can rearrange the choices by dragging them up or down while selecting the handle button to the left of each choice. A choice may be removed by selecting the delete icon. To remove all choices, press the erase icon that is located beside the + icon at the top of the list.

Dropdown picker question

Dropdown picker questions are used to quickly select a single option from a list of choices. These questions use a wheel-like scrolling interaction that only shows a small set of the options at a time. This question type is good for alphabetically sorted single-select questions like country, colors, brands, or categories. For single-select questions that support images but fewer choices, see the single-select question type.

1. Provide a **Question title**. You can also include an optional **Header** text.

2. Under **Choices**, you can add each of your options. As these questions can support a large number of options, it is recommended that you add choices in a logical ordering such as alphabetical. Each choice has the following fields:

a. **Value**: The true identifier for a choice. This value is what appears in the conversation control when a customer selects a choice. By default, the value is also used as the text that is shown to customers. However, when working in multiple languages or listing products, you might prefer to show an agent the product reference number and product name.

b. **Text** (Optional): What the customer will see when viewing the question. By default, the text will match the value. Changing the text content can allow you to

localize selection questions without changing what the agent sees in the response.

3. To add more choices, select the + icon within the properties panel or builder. Choices can be rearranged by dragging them up or down while selecting the handle button to the left of each choice. You can remove a choice by selecting the delete button. To remove all choices, select the erase icon located beside the + icon at the top of the list.

4. Once you've listed all your choices, you can choose a default answer by selecting **Set default value** and choosing an item from the dropdown. If you choose not to select one, the default is automatically set to the first item in your choices. For a large, sorted set of choices, setting the default value to an item in the middle or the most common answer might reduce the amount of scrolling needed.

Date picker question

Date picker questions are used to quickly select a date using a wheel-like scrolling interaction. Date picker can be configured to only allow dates within a pre-defined timespan. This question type is good for adding birthdays, purchase dates, or future events. Date pickers don't support times, which would need to be provided in a single line or multiline input question type.

1. Provide a **Question title**. You can also include an optional **Header** text.

2. **Label** is an optional value that appears beside the text field and can serve as an more prompt. For a question titled "When were you born", the label might be set to "Birthday".

3. To limit the timerange that customers can add, there are two optional range values:

   a. **Min**: This value represents the furthest back date that can be selected. When this value is set, no dates earlier than this date can be selected.

   b. **Max**: The value represents the furthest-forward date that can be selected. If this value isn't set, the maximum date will be the date that the customer responds. When asking a question about a future date, this value must be set.

4. The **Start date** value is the preset value that appears when the question opens. If this value isn't set, the start date will be the date when the customer is completing the form.

List Picker

Within the designer, the first fields are related to the message that appears within the messages application.

1. First, provide a message title that'll serve as title for both the message and the list picker.

2. The following fields are optional:

   a. **Message subtitle**: This text appears below the message title. It can be used as a call-to-action text or to provide more context that's not included in the header.

   b. **Image URL**: The image displayed to customers within the list picker's message and customer's response message. Image URLs must be a valid image type; videos and GIFs aren't supported.

3. A list picker is composed of one or more sections containing at least one item. The following fields are part of each section:

   a. **Section title**: A title for each section that can provide context and instructions for customer responses.

   b. **Allow multi-select**: Determines whether the customer can select one or more items within the section. By default, sections will be single-select.

   c. **List items**: Each section must include at least one option. Options can be added by selecting **Add option**, or removed by selecting **Remove**. Each option has the following fields:

   i. **Option title**: The title field is required and will be what appears as the customer's response in the messages app and in conversation control. Titles should be simple and straightforward, using the subtitle field for more details.

   ii. **Option subtitle**: Subtitles are an optional field that can be used to provide details about an option, such as add-on costs, item descriptions, and other secondary information.

   iii. **Image URL**: A valid image URL for adding an image beside a list option. Images are optional and shouldn't be used in place of the title or subtitle text.

4. To add more sections, select **Add section**. When there are two or more sections, a section can be deleted by selecting **Remove**.

5. An optional response message can be added to the list picker rich message. This text will appear in the customer's response, below selection choices.

Suggested reply

1. The **Summary text** field contains helper text for the customer to see after they've responded to a suggested reply message. This field shouldn't be used as the question, as customers won't see it until after they select a choice.

2. Suggested reply messages can have between two and five options that should be kept concise.

3. To add more options, select **Add option**. When there are more than two options, an option can be removed by selecting the option's corresponding **Remove** icon.

Time picker

1. Within the designer, the first fields are related to the message that appears within the messages application. First provide a message title, which will serve as the title for the message.

2. The following fields are optional:

   a. **Message subtitle**: This text appears below the message title. It can be used as a call-to-action or to provide more context not included in the header.

   b. **Image URL**: The image displayed to customers within the list picker's message and customer's response message. Image URLs must be a valid image type, and videos and GIFs aren't supported.

3. Under **Event information**, you can configure the details and time slots as follows:

   a. **Event title**: The event title will appear within the customer's calendar application if they choose to add the event to their calendar.

   b. **Location name**: The location name will appear within the customer's calendar application if they choose to add the event to their calendar.

   c. **Event time zone**: This field is the time zone where the event will take place.

   d. **Adjust for daylight saving time**: By default, time zones are listed by their standard offset from GMT. However, if the event takes place in a region that uses daylight savings, this can result in timeslots being incorrectly converted. By toggling this setting to **Yes**, the daylight saving offset will be automatically applied for each timeslot listed.

   e. **Customer display option**: By default, each time slot's start times will be converted to the customer's local time zone. To cause events to display in the

event time zone regardless of the customer's current time zone, select **match event time**. Matching the event time can be helpful when customers may be travelling across time zones for the event, and need to more clearly understand the start time.

f. **Duration**: The duration of an event is not visible during time slot selection. It's automatically added to the calendar event and used to calculate the end time of an event. Events can range from zero minutes to multiple days long. Duration can be defined in the following units:

- Minutes
- Hours
- Days

g. **Time slot**: The set of choices a customer can select from. To create time slots, select **Add date**, then add the following fields:

- **Date**: The date used for each associated start time.
- **Start time**: Define each time slot that a customer can select. These will be grouped under the selected date.
- To add more start times for a specific date, select the Add time slot button below existing start time.

h. To add more dates, select **Add date**, and then complete preceding steps for adding time slots.

> ⓘ **Note**
>
> Past time slots won’t display on the customer's device.

4. An optional response message can be added to the time picker rich message. This text will appear in the customer's response, below their time slot selection.
    - **Recommendation**: Use the response message as a call to action, encouraging customers to click the message for more details. The added details will include an **Add to Calendar** option that will display information such as event title and duration.

Video rich link

1. Provide a **Title** for the website rich link, which will be displayed alongside the image within the messages application.
2. Provide the **Video URL**, which is the plain text URL that links directly to a video file.

   > **Note**
   >
   > Embedded videos and video streaming websites won't work correctly. The video URL must link directly to a video's source. If a video streaming website's URL is used, the rich link won't work. To link to video streaming sites, instead use the **Website rich link** style rich message. Supported format types include .mp4, .mkv, .wmv, .m4v, .mov, .avi, .flv, .webm, .flac, .mka, .m4a, .aac, and .ogg.

3. Provide the **Image URL**, which is used to display a relevant image alongside the rich link title. The image URL must be a valid, still image in order to display correctly.

   While an image URL is not required for video rich link messages, it's highly recommended. Video rich links that are sent without an image preview will appear as blank previews. Adding a keyframe or relevant image will improve the customer experience.

Website rich link

1. Provide a **Title** for the website rich link, which will be displayed alongside the image within the messages application.
2. The **Website URL** is the plain text URL that the rich link will launch when the customer selects or long-presses on the message.
3. The **Image URL** is used to display a relevant image alongside the rich link title. The image URL must be a valid, still image in order for it to display correctly.

See also

Configure Apple Messages for Business
Understand and create workstreams
Set up unified routing for records
Configure automated messages
Configure a post-conversation survey
Skill-based routing
Create message templates

Templates
Delete a configured channel
Support for live chat and asynchronous channels
sendMessageToConversation JavaScript method
Retrieve and format rich messages

Enable personal quick replies for agents

Article • 03/08/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can allow agents to create their own personal quick replies that are stored in the agent's context and which the agent can invoke by using the associated tags during a session with a customer. Agents can use personal quick replies to respond to customer queries efficiently with minimal turnaround time.

As an administrator, you can use a Power Automate utility to delete unused tags.

Enable personal quick replies

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   - In the site map, in **Agent experience**, select **Productivity**.

2. For **Personal quick replies**, select **Manage**.

3. On the **Personal quick replies** tab, set the **Allow agents to create personal quick replies** toggle to **Yes**.

The settings for creating personal quick replies is made available for agents.

> **Note**
>
> - It can take up to 15 minutes for the setting to take effect.
> - We recommend that you do not assign the System administrator role to agents or supervisors to avoid enabling access to other users personal quick replies on the **Quick replies** panel of a conversation.

See also

Create quick replies
Create personal quick replies

Enable the transcription experience for messaging channels

Article • 08/02/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As an administrator, you can enable live transcription and recording of conversations, which allows agents and supervisors to view transcripts of customer conversations. The transcriptions include sentiment analysis data and can be searched through.

> **Important**
>
> Many countries and states have laws and regulations that apply to the recording of PSTN, voice, and video calls, and may require that users first consent to the recording of their communications. It is your responsibility to use the call recording capabilities in compliance with the law. Before using call recording features, you must obtain consent from the parties of recorded communications in a manner that complies with all applicable laws for each participant.

Enable the transcript experience

> **Note**
>
> The transcript feature is generally available; however, in some environments, you might see a preview tag or banner in the interface. Any preview annotations for this feature can safely be ignored.

To enable transcripts

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

a. In the site map, select **Productivity** in **Agent experience**.
b. On the **Productivity** page, select **Manage** for **Transcript**.

2. On the **Omnichannel Configuration - Transcript settings** page, turn on the **Try out our new transcript experience for digital messaging channels** toggle.

3. Select **Save**.

View the transcripts

You can view the conversation transcriptions in the Customer Service admin center, Omnichannel admin center, and Omnichannel for Customer Service apps.

To view transcripts in Omnichannel admin center, do the following:

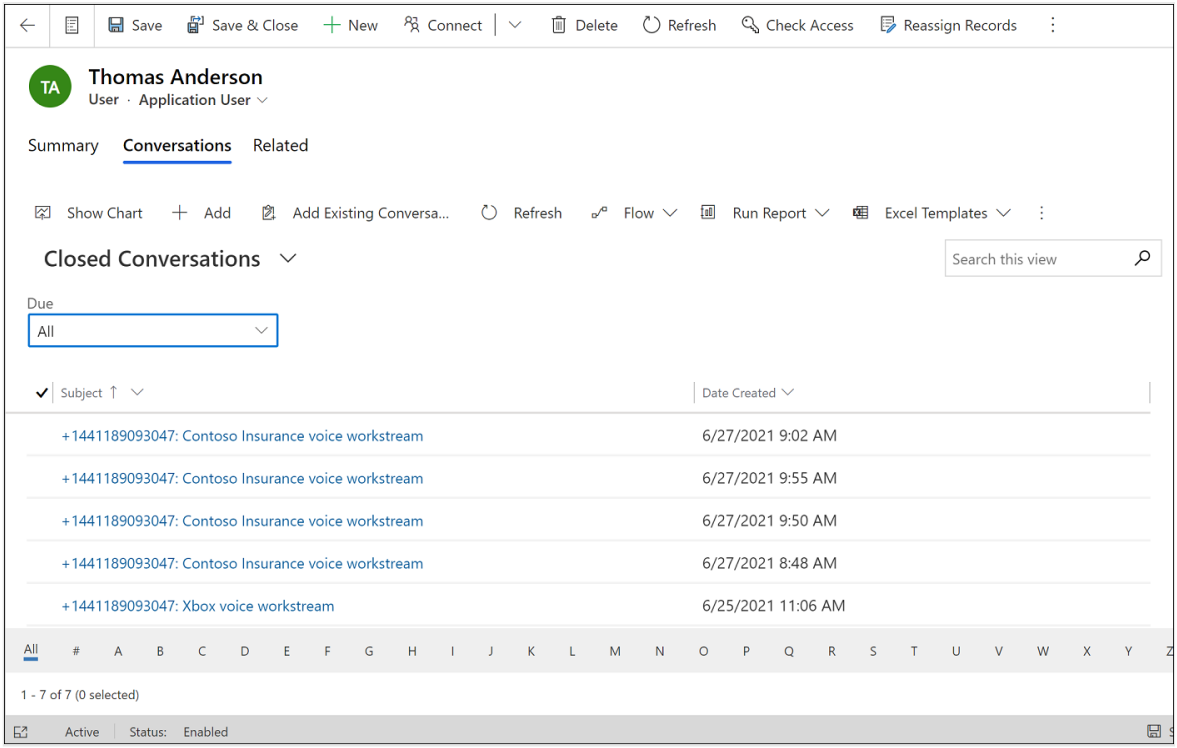
1. In the Customer Service admin center site map, select **User management**, and then select **Manage** for **Users**. If you're using Omnichannel admin center, in the site map, select **Users**.

2. Select the user whose conversations you want to view.

3. Select the **Related** tab, and then select **Conversations** from the dropdown menu.

4. Select **Closed conversations** from the dashboard dropdown menu.

5. Select the conversation for which you want to access the transcript.



To view transcripts in Omnichannel for Customer Service, do the following:

1. Open the Omnichannel for Customer Service app, and then switch to the **Omnichannel Agent Dashboard** view. Completed chat conversations are displayed in the **Closed work items** column.
2. Do one of the following:
   a. Select the closed work item for which you want to view the transcript.
   b. Right-click the three dots to view the transcript.

> **Note**
>
> As an administrator, only you have access to the conversations that are handled by other agents.

See also

Configure chat
View communication panel

Enable sound notifications for conversations

Article • 05/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Sound notifications for incoming conversation requests, such as live chat, that require immediate response are helpful in making sure the requests are not missed. Administrators can enable the sound notification settings in the configuration settings of Omnichannel for Customer Service. The option to personalize allows agents to customize their preferences for sound and volume selections, among other things. The sound notifications are available across all channels and can also be set for messages for ongoing conversations.

Prerequisite for sound notifications

Make sure the browsers used by agents allow sounds to be played. In Microsoft Edge, sound is allowed by default. However, if for some reason, sound settings are turned off, you can enable them by going to the media autoplay setting in Microsoft Edge. For information on how to enable sound notifications for other browsers, see the browser-specific documentation.

Enable sound notifications

When you enable sound settings, the options to personalize settings are available for all the channels that are provisioned in your environment.

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

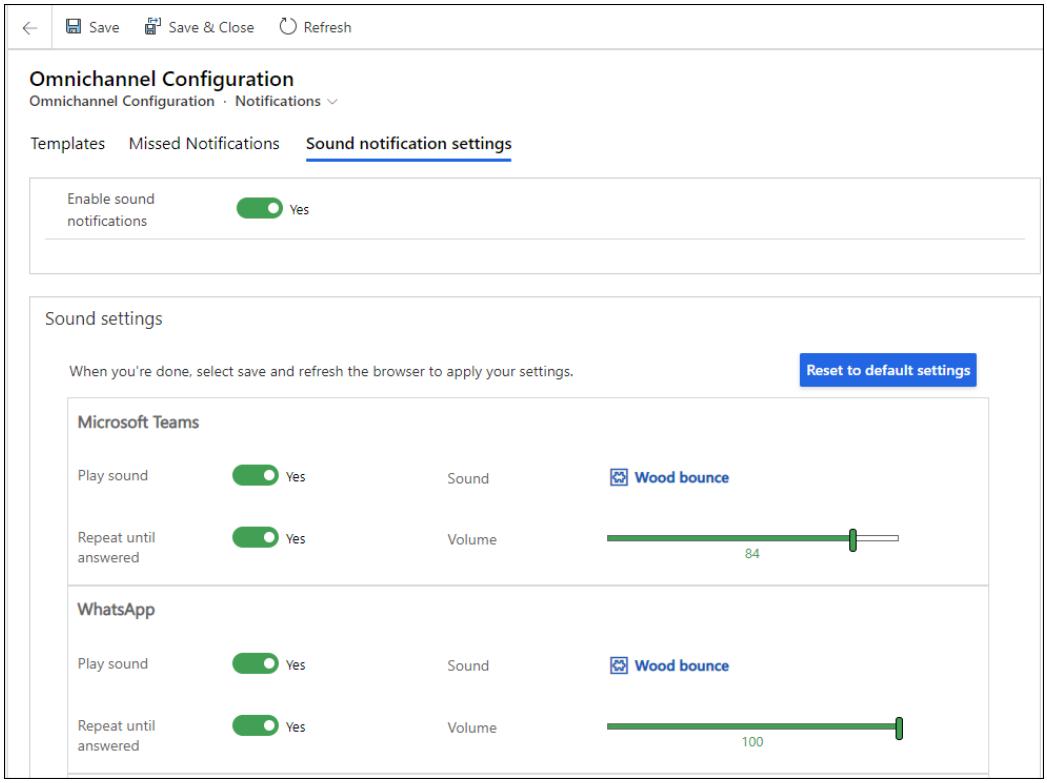
   a. In the site map, select **Workspaces** in **Agent experience**.
   b. On the **Workspaces** page, select **Manage** for **Notification templates**.

2. On the **Omnichannel Configuration - Notifications** page, select **Sound notification settings**.

3. Set the toggle to **Yes** for **Enable sound notifications**. The **Sound settings** area is displayed.

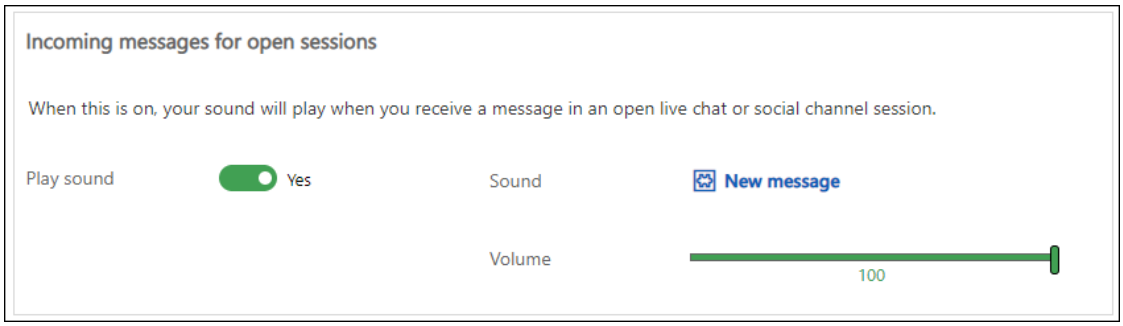
4. Customize the notification settings for the required channels. The following settings are for Microsoft Teams:

    - **Play Sound:** Set the toggle to **Yes**.
    - **Repeat until answered:** Set the toggle to **Yes** if you want the sound to be played till the agent responds.
    - **Sound:** Accept the default setting or search and select a different audio file. You can use the **New Audio File** option to upload and use an audio file of your choice. You also have the option to preview the audio.
    - **Volume:** Accept the default setting or use the slider to adjust the volume.



- **Reset to default settings:** When you customize any setting, the button is enabled for you to reset to the out-of-the-box settings.

5. In the **Incoming messages for open sessions** section, customize the options for sound notifications for messages in open sessions, such as live chat or a social channe



6. Select **Save.**

See also

Get started with Customer Service admin center

Personalize notifications

Enable missed notifications

Article • 04/04/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

With the missed notifications feature, you can choose to automatically set agent presence to inactive, so that no new tasks will be assigned when agents miss notifications for incoming chat requests. In addition to the status change, a message bar indicating that a notification has been missed will be displayed on the agent dashboard. Agents can reset their status by using the reset presence option that's displayed with the notification or by manually changing their status.

Important

- Missed notifications won't work if **Away** is included as an allowed presence for work streams. More information: **Understand and create work streams**
- Missed notifications is not supported in Omnichannel for Customer Service on Unified Service Desk.

Enable automatic update of agent presence when a notification is missed

1. In Dynamics 365, go to one of the apps, and perform the following steps.

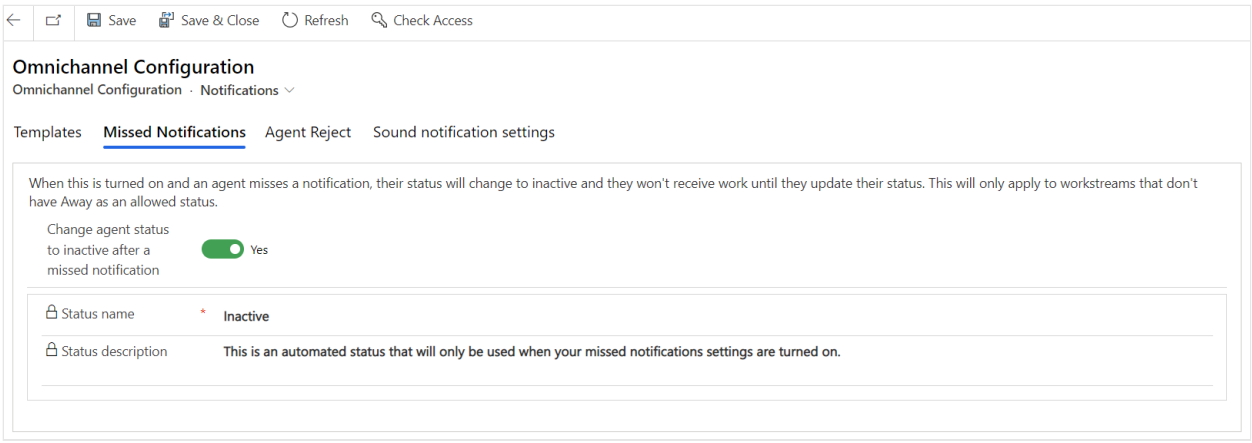
   Customer Service admin center

   - In the site map, select **Workspaces** in **Agent experience**, and then select **Notification templates**.

2. On the **Omnichannel Configuration** page, select the **Missed Notifications** tab.

3. Set the **Change agent status to inactive after a missed notification** toggle to **Yes**. The **Status name** and **Status description** settings appear.

4. Select **Save**.



See also

Manage notification settings and templates

View notifications

Enable automatic update of presence on rejection of work assignment

Article • 05/23/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can enable agent presence to be updated automatically to **Do not disturb** when agents reject an incoming notification for a work assignment. No new tasks are assigned when agents reject notifications for incoming chat requests. Also, a message indicating that the agent presence has been changed is displayed at the top of the agent dashboard. Agents can reset their status by using the reset presence option that's displayed with the notification, or by manually changing their status.

> **Important**
>
> - Work items will continue to be routed to the agent if **Do not disturb** is an allowed presence in the workstream. More information: **Create workstreams for unified routing**
> - Automatic change of agent status when agent rejects a notification is not supported in Omnichannel for Customer Service on Unified Service Desk.

Enable automatic update of agent presence

1. In Dynamics 365, go to one of the apps, and perform the following steps.

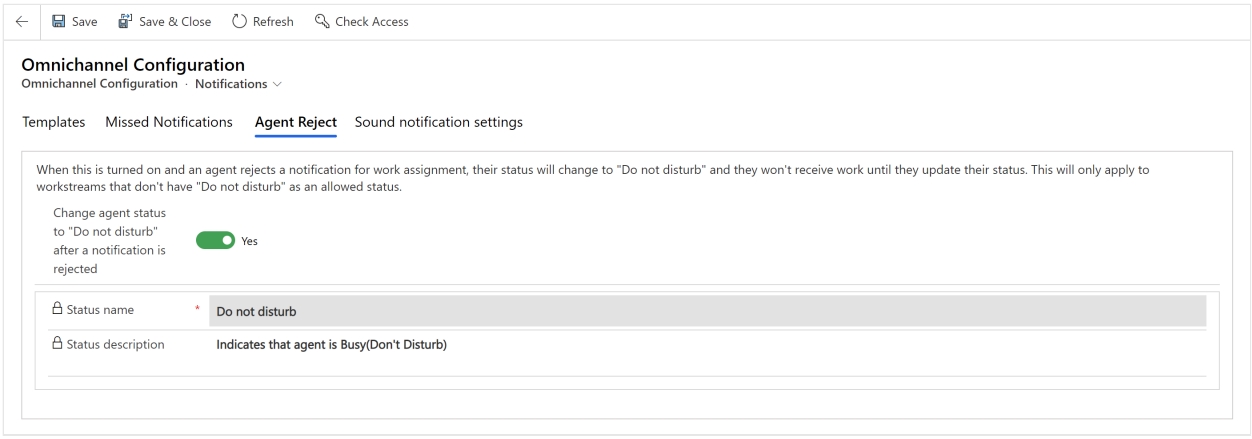
   Customer Service admin center

   a. In the site map, select **Workspaces** in **Agent experience**.
   b. On the **Workspaces** page, select **Manage** for **Notification templates**.

2. On the **Omnichannel Configuration** page, select the **Agent Reject** tab.

3. Set the **Change agent status to "Do not disturb" after a notification is rejected** toggle to **Yes**. The **Status name** and **Status description** settings appear.

4. Select **Save**.



See also

Manage notification settings and templates

View notifications

Enable conversations to be assigned automatically

Article • 04/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

Some customer conversation requests, such as those coming from a Facebook channel or an SMS channel, might not need an immediate response because of a longer service-level agreement. For such requests, you can enable the auto-assign option in the notification templates. When an incoming notification appears, the conversation is assigned to the agent automatically, either instantly or after the timeout period elapses.

> **Important**
>
> Auto-assign isn't supported in Omnichannel for Customer Service on Unified Service Desk.

Perform the following steps:

1. In Customer Service admin center, in the site map, go to **Workspaces** under **Agent experience**.
2. Select **Manage** for **Notification templates**.
3. On the **Omnichannel Configuration** > **Omnichannel Configuration - Notifications** page, select the template for which you want to enable the incoming conversation to be assigned.
4. On the **General** tab of the **<*notification_name*> Notification Template**, set the toggle to **Yes** for **Auto-assign work items**. The label for **Accept Button** changes to **Open**, and the toggle for **Show Reject Button** is disabled.
5. Select **Save**.

> **Note**
>
> We recommend that you don't enable the auto-assign setting in consult notification templates.

Enable voice calls and chats to be accepted automatically

When an agent rejects an incoming conversation, it is routed back to the queue. This impacts customer SLAs, queue wait times, and customer satisfaction. To avoid such scenarios, a conversation can be automatically accepted by an agent, either instantly or after the timer elapses.

Perform the following steps to enable the incoming conversations to be assigned automatically:

1. In Customer Service admin center, in the site map, go to **Workspaces** under **Agent experience**.
2. Select **Manage** for **Notification templates**.
3. On the **Omnichannel Configuration** > **Omnichannel Configuration - Notifications** page, select the required template.
4. On the **General** tab of the **<*notification_name*> Notification Template**, set the toggle to **Yes** for **Auto-assign work items**, and then set the **Auto-accept**

voice/chat calls toggle to **Yes**. The **Show Countdown** field is set to **Yes** and disabled.

5. Select **Save**.

See also

Manage notification templates
View notifications

Configure the agent calendar view

Article • 10/28/2023

As an administrator or a supervisor, you can help agents in your organization view their work schedules. The **My Schedule** view in the Dynamics 365 Customer Service workspace app lets agents quickly view their working hours, nonworking hours, breaks, and any scheduled time off.

The calendar view is a read-only visual that provides daily, weekly, and monthly views of an agent's schedule. It also has an agenda view that provides a list-type view of the agent's schedule.

Prerequisites

- You must have **Workforce Management for Customer Service** enabled in your environment.

  To enable Workforce Management, complete the following steps:

  1. Navigate to your environment in Power Platform admin center (PPAC).

     > **Note**
     >
     > You must have the System Administrator role to make changes to your environment.

  2. On the command bar, select **Resources** > **Dynamics 365 apps**. The Dynamics 365 apps page is displayed.
  3. Select **Install app**. The **Install Dynamics 365 apps** page is displayed.
  4. Scroll down to locate and select **Workforce Management for Customer Service**, and then select **Next**.
  5. You must agree to the terms of service, and then select **Install**.
  6. Wait until the **Workforce Management for Customer Service** shows as installed on the **Dynamics 365 apps** page.

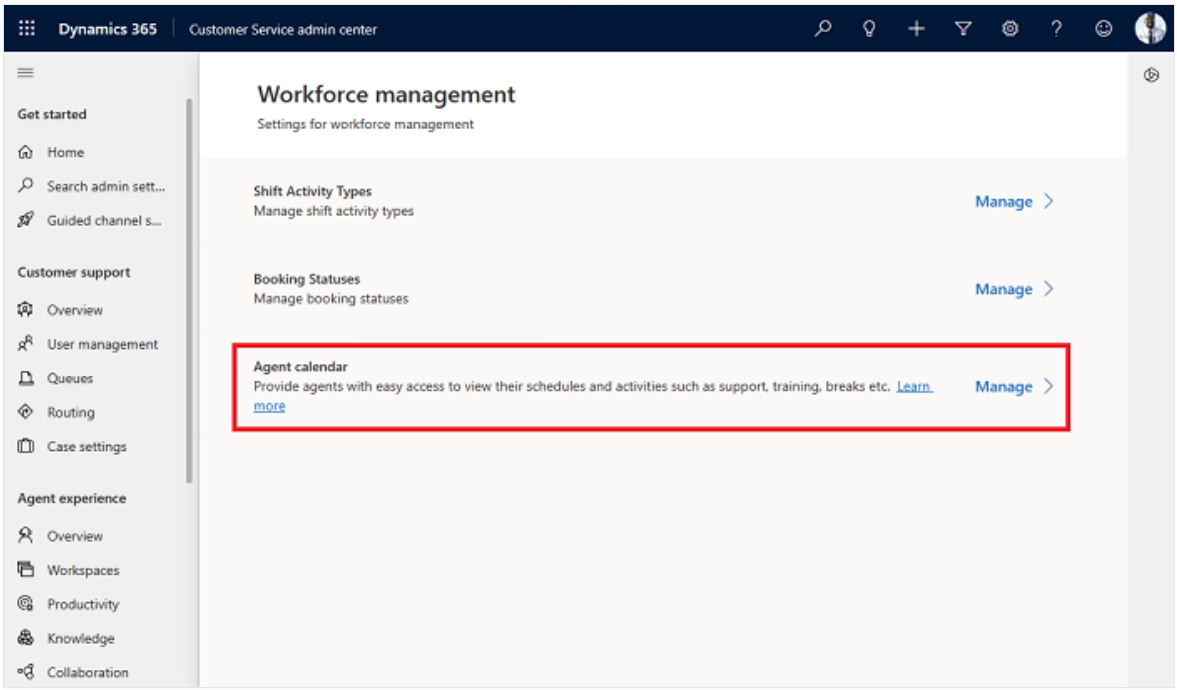
- To enable the calendar view for agents, you must have at least one of the following roles:
  - System Administrator

    - CSR Manager
    - Omnichannel administrator
    - Omnichannel supervisor

- You must have a third-party adapter configured to import agent bookings from an external system. Without an adapter in place, external bookings can't be surfaced in the agent calendar, and agents can't view their schedules.

Enable the agent calendar

1. In the Customer Service admin center site map, select **Workforce management**.
2. In the **Agent calendar** section, select **Manage**. The **Agent calendar** page is displayed.



3. Turn on the **Enable agent calendar** toggle.
4. Select **Save and close**.

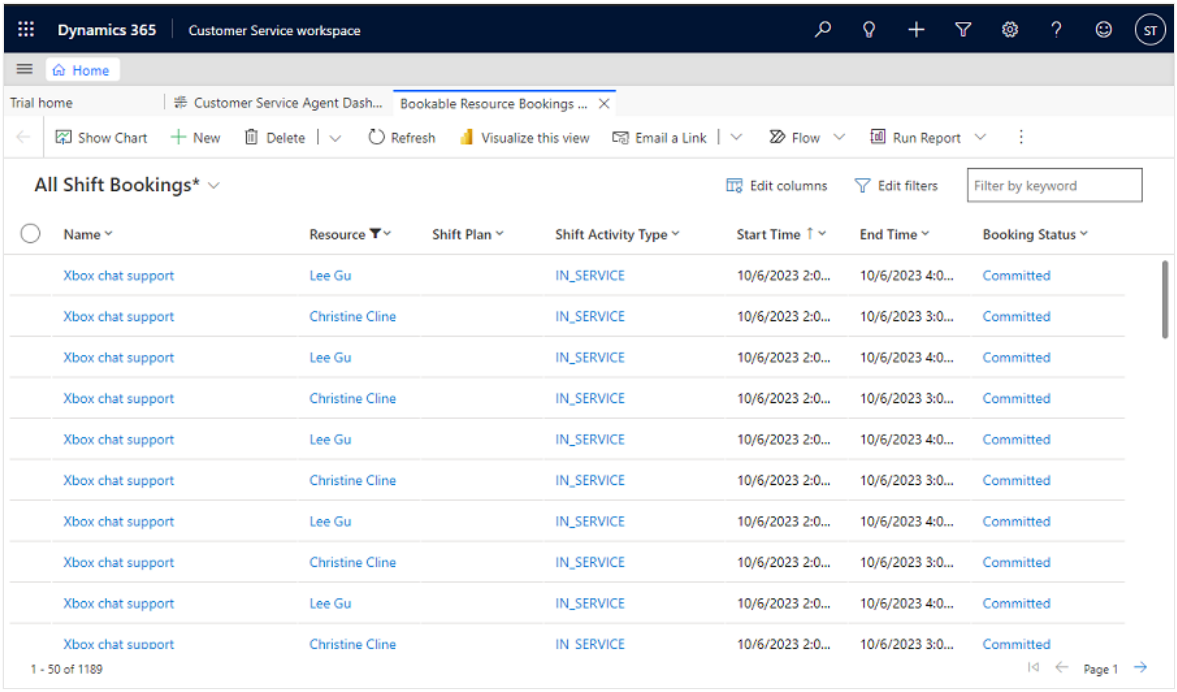
Shift bookings view for supervisors

The shift booking list view lets supervisors view the bookings that are imported from their third-party workforce management system. Supervisors can use this view to access a consolidated list of bookings for all agents in their system. The shift bookings view offers a comprehensive breakdown of each agent's individual activities, including work hours, time off, lunch breaks, trainings, and more.

Administrators can utilize this view to verify the proper functioning of the third-party adapter booking sync process.

1. In Customer Service workspace, expand the site map, and then select **Shift Bookings**.

2. Select the **All Shift Bookings** view.



Next Steps

Get started with Customer Service workspace

Use the agent calendar view

Configure knowledge management

Article • 07/03/2023

Introduction

A comprehensive knowledge base is a key to increased customer satisfaction and improved productivity of users. Give users quick access to the knowledge base by setting up knowledge management in Dynamics 365 Customer Service.

> **ⓘ Important**
>
> Usage of Parature knowledgebase as a knowledge management solution has been deprecated. For more information, see **Important changes coming**.

After knowledge management is set up, users will be able to:

- Search for relevant knowledge base articles from Customer Service while they're working on a record.
- Set up the search logic, suggest-as-you-type option, and search filters to get only the required knowledge articles, thereby providing timely and consistent information to customers while working on their cases.
- Use smart assist to receive AI suggestions on related knowledge articles and similar cases.
- See the content of the knowledge base article inline, including images and videos.

Setup overview

You can set up knowledge management on the Customer Service admin center, Customer Service Hub, or manually for a model-driven app.

- Set up knowledge management
- Set up knowledge management settings page manually for a model-driven app

After you have configured knowledge management on your app, you must also set up the various other aspects of knowledge management, based on your organizational requirements, such as:

- Configure knowledge base article URLs

- Create and manage categories
- Create templates for knowledge articles
- Set up AI suggestions for article keywords and description
- Set up external search providers

Set up knowledge management

Make sure that you have the System Administrator or System Customizer security role or equivalent permissions. You must also be the tenant administrator of Microsoft 365.

You can set up knowledge management in the Customer Service admin center or Customer Service Hub app. The settings you configure for knowledge management in the Customer Service Hub app are carried over to the Customer Service admin center app, and vice versa.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.

2. In the **Record types** section, select **Manage**.
   a. On the **Record Types** page, add and configure the record types for which you want to turn on knowledge management. More information: Configure knowledge search control on app side pane for an entity record. By default, knowledge management is enabled for **Case** and **Conversation** record types. The ability to set up knowledge search control for app side pane is available only in the Customer Service admin center app.

3. In the **General Settings** section, select **Manage**. The **General Settings** page appears.
   a. In the **Search results display count** section, select the display count from the dropdown. This option is only available for the app side pane knowledge base search control, and standalone knowledge base search control in single session and multisession apps.
   b. In the **Feedback** section, set the **Enable feedback** toggle to **Yes**. To learn more about how users use this option, see Submit ratings and feedback for knowledge articles.
   c. In the **Authoring language** section, set the **Enable default authoring language** for your users to **Yes**.

- If you want to select a default knowledge authoring language for your organization, then select the **Organization's UI language** radio button.
- If you want to use the organizations' s UI language as the default knowledge authoring language, select the **Other language** radio button, and then select a language from the **Language** dropdown.
- If you also want to allow users to set their default knowledge authoring language, set the **Allow users to set default knowledge authoring language** toggle to **Yes**. More information: Configure a default knowledge article authoring language for your organization
- In the **Origins allow list** section, add your origins links to the **Add origin links** field. More information: Configure origins allowlist for knowledge articles.
- In the **Knowledge search logic** section, set the **Set search mode as all** toggle to **Yes**. More information: Set up knowledge search logic
- Select **Save**.

4. Optionally, in the **Categories** section, select **Manage**. The **Categories System Views** page appears. You can create and manage a logical structure of categories for your records. More information: Create and manage categories.

5. In the **Filters** section, set the **Enable search filters** toggle to **Yes**. If you want to allow agents to save the the search filters according to their areas, set the **Allow agent to personalize** toggle to **Yes**.

6. In the **Portals** section, select **Manage**. The **Portals** page appears.
   a. In the **Support portal connection** section, do the following to share knowledge articles as URLs:

      - Set the **Use an external portal** toggle to **Yes** to integrate an external portal to publish knowledge articles.
      - **URL Format**: Type the portal URL that will be used to create external (public-facing) portal links for knowledge articles, which the service agents can share with the customers. The external URL is created in the following format: https://support portal URL/kb/{kbnum}. The placeholder, "{kbnum}", is replaced by an actual knowledge article number.

   b. In the **Sync knowledge article attachments to portal** section, set the **Sync attachments to the portal** toggle to **Yes**. More information: Update knowledge article attachments for portal

7. Optionally, in the **Article templates** section, select **Manage**. The **Article Templates System Views** page appears. You can create templates to help

knowledge authors use consistent language and messaging. More information: Create templates for articles.

8. Optionally, in the **Search providers** section, select **Manage**. The **Search providers System Views** page appears. You can use search providers to federate the search of files, documents, or articles from data sources outside of your current Dynamics 365 organization. More information: Set up external search providers

> **Note**
>
> During the creation of knowledge articles, duplicate detection rules aren't supported on the Knowledge Article entity.

Set up knowledge management settings page manually for a model-driven app

> **Note**
>
> The embedded knowledge search control is deprecated in the web client. You must use the Knowledge Settings page in Unified Interface.

If you are using the custom model-driven app, you need to manually update your sitemap with the Knowledge Settings page. To update the sitemap:

1. Select your custom app.
2. Select **Open in app designer**.
3. Select **Site Map**.
4. Select **Add** > **Subarea** to create a new sub area for your area.
5. In the **Properties** > **SUB AREA** section, provide the following information:
   - Type: Select **URL**.
   - URL: Enter `/main.aspx?pagetype=inlinedialog&name=KnowledgeSettings`

Configure knowledge base article URLs

Knowledge articles can be configured with their portal URLs, and then agents can copy and share the URL links.

> **Note**
>
> Before you can configure knowledge articles with their own URLs, you must create a portal using your domain name. For information on how to create a portal, see **Create a portal in an environment containing customer engagement apps**.

You can configure a knowledge base article URL in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Support portal connection** section.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
2. On the **Knowledge** page, go to the **Portal** section and select **Manage**. The **Portal** page appears.
3. On the **Portal** page, go to the **Support portal connection** section.

2. Set the **Use an external portal** toggle to **Yes**.
3. In the **URL format** field, enter the URL name.
4. Select **Save**.

The knowledge base article link is now active and can be copied and shared.

Update knowledge article attachments for portal

With the knowledge article attachments option, you can stop using notes attachments for the portal. To use knowledge article attachments for the portal, you must enable the feature in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Sync knowledge article attachments to portal** section.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**. The **Knowledge** page appears.
2. In the **Portals** section, select **Manage**. The **Portal** page appears.
3. On the **Portals** page, go to the **Sync knowledge article attachments to portal** section.

2. Set the **Sync attachments to portal** toggle to **Yes**.
3. Select **Save**.

Set up AI suggestions for article keywords and description

You can enable knowledge authors to get suggested keywords and description based on the article content stored in the built-in knowledge article entity. More information: Configure AI suggestions for article keywords and description.

Set up knowledge search logic

If you have Dataverse search enabled, you can apply knowledge search logic for your knowledge articles to help agents find only the articles they need. By default, knowledge search works by the `searchMode=any` logic, which brings up articles that match any of the keywords used in your search. If you search for Contoso Coffee, the search results will show articles that have either "Contoso" or "Coffee", as seen in the following example:

- Article 1: Contoso machine repair
- Article 2: Coffee powder quality
- Article 3: Contoso coffee order price
- Article 4: Coffee machine order for Contoso
- Article 5: Espresso coffee machine troubleshooting

You can enable the knowledge search to work by the `searchmode=all` logic, which matches all the keywords that you used in the search. If you search for Contoso Coffee, the search results will show articles that match both "Contoso" and "Coffee", as seen in the following example:

- Article 1: Contoso coffee order price
- Article 2: Coffee machine order for Contoso

You can set up the knowledge search logic in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Settings** page.

Customer Service admin center

1. In the site map, select **Knowledge** in **Agent experience**.
2. On the **Knowledge** page, in the **General settings** section, select **Manage**. The **General settings** page appears.

2. In the **Knowledge search experience** section, set the **Set search mode as all** toggle to **Yes**.
3. Select **Save**.

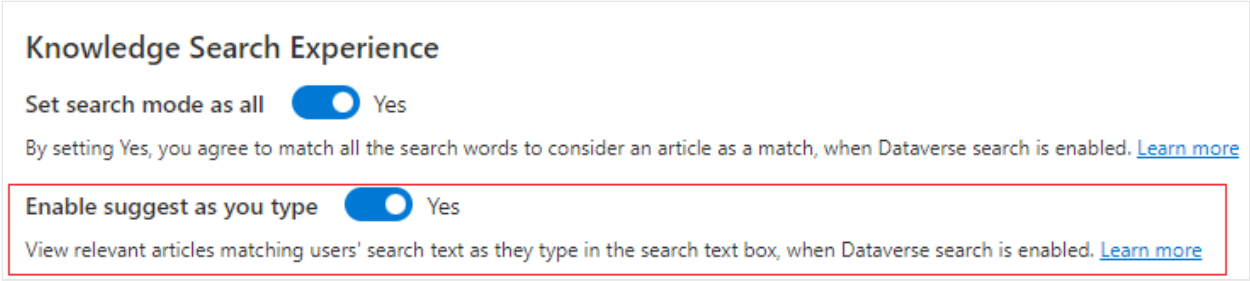
More information: Search across table data using Dataverse search

Enable the suggest-as-you-type option

You can help agents improve their productivity by setting the **Enable suggest as you type** toggle to **Yes**. This feature provides suggestions on the most relevant records as agents type keywords in the search box. The search phrase is matched against the title of the article, and the matching results appear in a flyout menu. The matched text is highlighted to show the presence of the keyword.

When an agent selects the record, the system displays the article inline on the knowledge search control embedded on a form, on an application tab in Customer Service workspace, and as an inline view in the independent knowledge search control. More information: Use suggest-as-you-type

1. In the Customer Service admin center site map, select **Knowledge** in **Agent experience**.
2. On the **Knowledge** page, in the **General settings** section, select **Manage**. The **General settings** page appears.
3. In the **Knowledge search experience** section, set the **Enable suggest as you type** toggle to **Yes**.
4. Select **Save**.



See also

Add the Knowledge Base Search control to a form

Use the productivity pane to help resolve customer issues

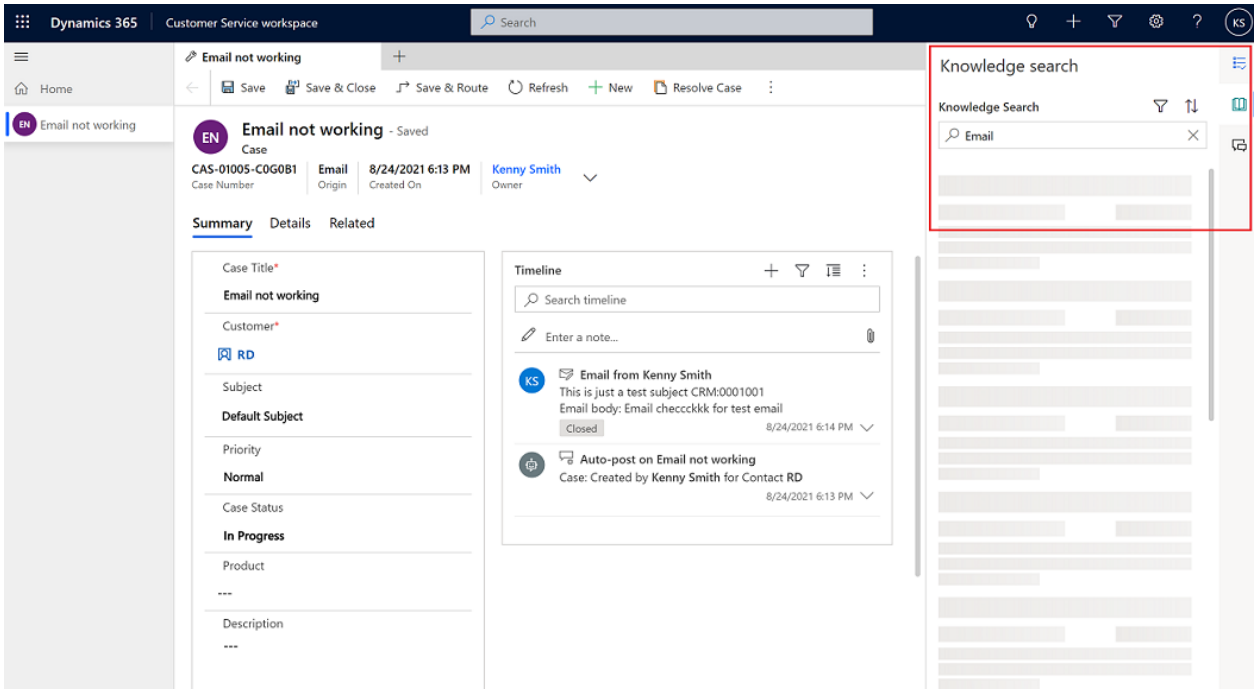
Article • 11/10/2021

The productivity pane in the Customer Service workspace is an auxiliary work area that contains tools for supporting or expediting tasks when agents are resolving customer issues.

Currently, the productivity pane includes controls to help agents quickly view and interact with relevant AI-generated knowledge articles and similar cases suggestions for the case they are working on, work with agent scripts and macros, and search for knowledge base articles.

The productivity pane and the controls are enabled for agents through profiles that are managed in app profile manager. More information: App profile manager

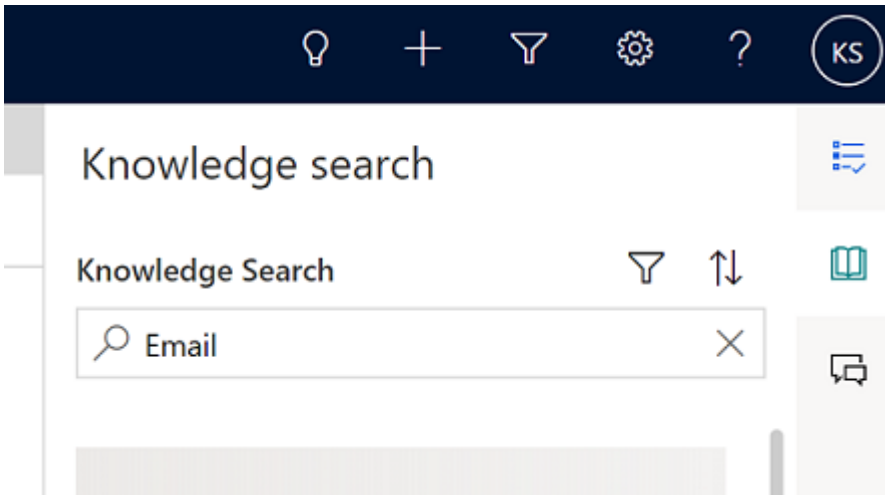
> **Important**
>
> The productivity pane displays information (for example, knowledge article and similar case suggestions) for the first tab (referred to as the anchor tab) of an active case session.



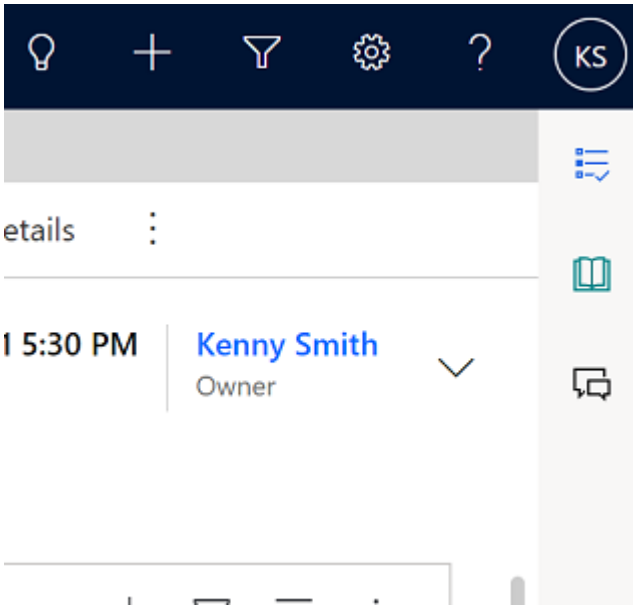
Productivity pane modes

The productivity pane has two modes: expanded and collapsed. Depending on which settings your administrator has configured, you can use the arrow to set the mode of the productivity pane, and the mode you choose is preserved in different sessions. For example, say in session A you expanded the pane, but while in session B, you collapsed it. When you switch from session A to session B, the pane mode changes from expanded to collapsed. Then if you switch back to session A, the pane is still in its expanded mode.

Expanded mode:



Collapsed mode:



Two things to keep in mind about the productivity pane modes:

The productivity pane stays collapsed for entities that don't have productivity controls configured to use it. For example, if you open an account record, which typically doesn't have smart assist or knowledge enabled for it, or if agent scripts or macros aren't enabled by your administrator, the pane remains collapsed.

The productivity pane places focus on the first control that has data for any table. Typically, the order is smart assist, agent scripts and macros, and then knowledge controls. For example, if you open an account record that has only scripts configured, when the record opens, the productivity pane expands and the focus is on the agent scripts and macros.

Smart assist

Smart assist is an intelligent assistant that provides real-time recommendations to help you take actions while interacting with customers. It allows organizations to build a custom bot and plug-in to their environment. These custom bots interpret conversations in real time and provide relevant recommendations such as knowledge articles, similar cases, and next-best steps to the agent's user interface.

Smart assist displays the relevant suggestions as individual cards that are grouped as either Knowledge article suggestions or Similar cases suggestions. For more information, see View AI-suggested similar cases and knowledge articles.

Agent scripts and macros

> **Important**
>
> - In the out-of-box Customer Service workspace application, you must first create a custom profile before you can enable agent scripts. Only the Smart assist and knowledge article search functions are available in the out-of-box experience. For information about creating custom profiles, see **Overview of app profile manager**.

Agent scripts in Customer Service workspace help provide guidance for what you should do when you have a customer issue, and helps ensure that you share only accurate and company-endorsed information. These scripts help you be accurate, effective, and efficient in customer handling. For more information, see Guide customer interaction with agent scripts. For administrator information about configuring scripts, see Guide agents with scripts.

A macro is a set of instructions that tells the system how to complete a task. When a macro runs, the system performs each instruction. Macros in agent scripts show a title, instruction that system performs, and the macro icon. For administrator information about configuring macros, see Automate tasks with macros.

Knowledge article search

The knowledge base search lets you search for relevant knowledge articles to resolve a case. These articles are displayed based on relevance and full-text search mechanisms. For more information, see Search for knowledge articles.

See also

Customer Service workspace - overview
View AI-suggested similar cases and knowledge articles
Guide customer interaction with agent scripts
Automate tasks with macros
Search for knowledge articles

View smart assist suggestions for knowledge articles and similar cases using AI

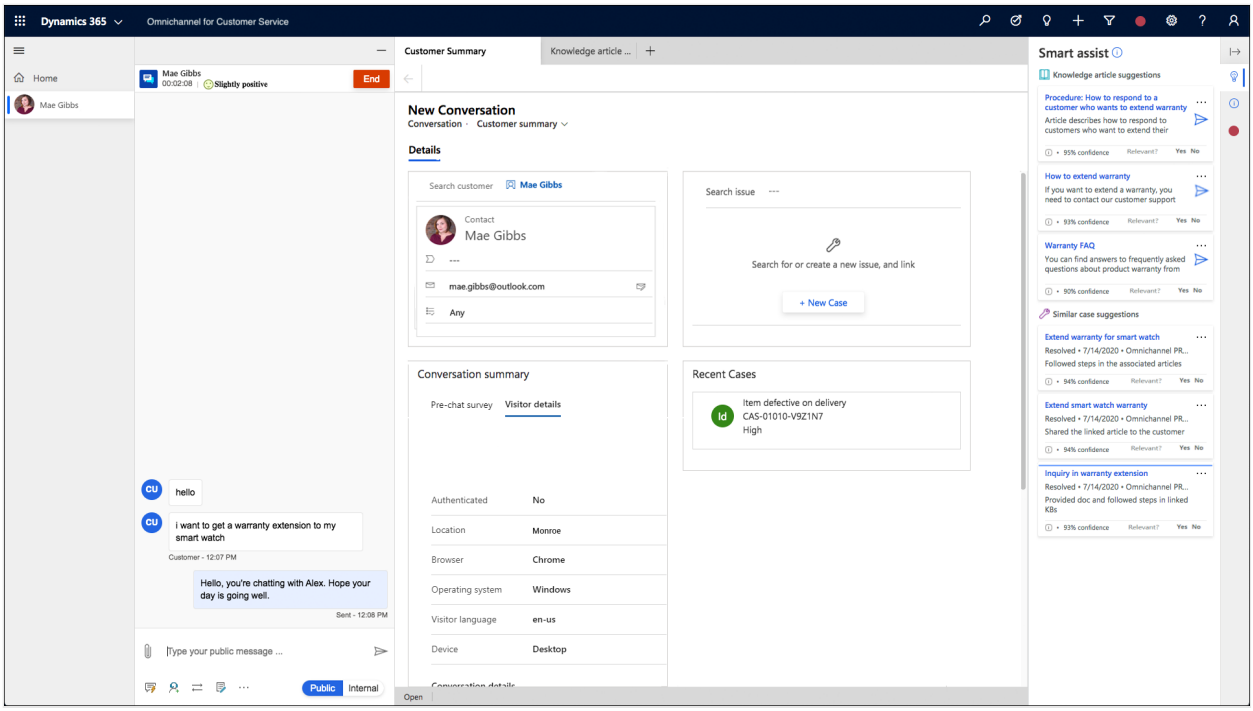
Article • 08/13/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Introduction

The AI suggestions are displayed in smart assist, which is an intelligent assistant that provides real-time recommendations to you, helping you take actions during your interactions with customers.

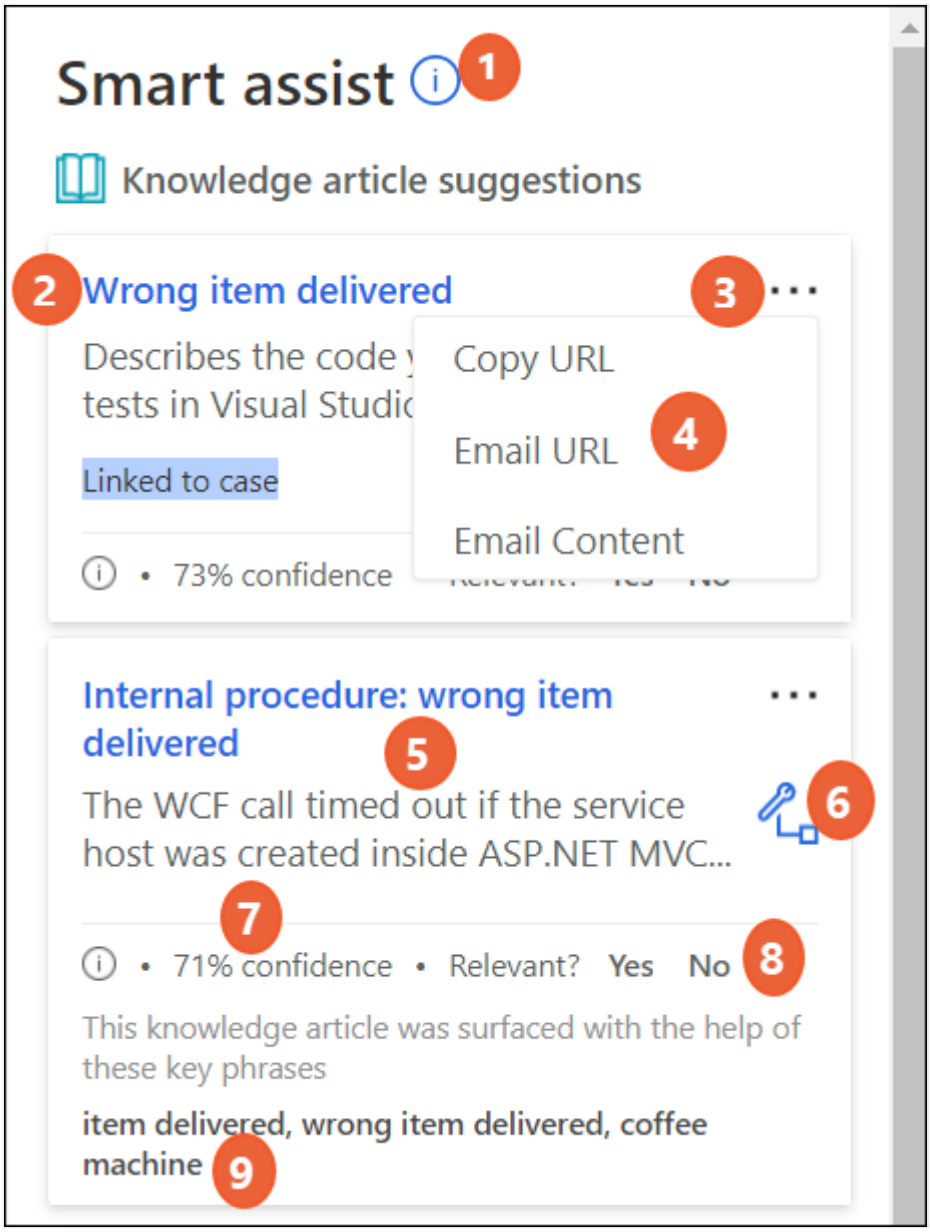
The AI-suggestions for similar cases and knowledge articles are powered by a set of pretrained natural language understanding models that help you find relevant knowledge articles or similar cases quickly, based on the context of ongoing conversations that you're handling. Your administrator can enable AI-suggested similar cases and knowledge articles through a single click. These suggestions are displayed in real time based on the conversation context.



If the productivity pane has been enabled for you, the smart assist cards appear on the productivity pane when you're interacting with a customer in an ongoing conversation. By default, the productivity pane is enabled out of the box.

Understand the knowledge article components in smart assist

When you're interacting with a customer in an ongoing conversation, up to three top knowledge articles that match the conversation context are displayed in the **Smart assist** pane. The suggestions are dynamically refreshed based on the conversation context.



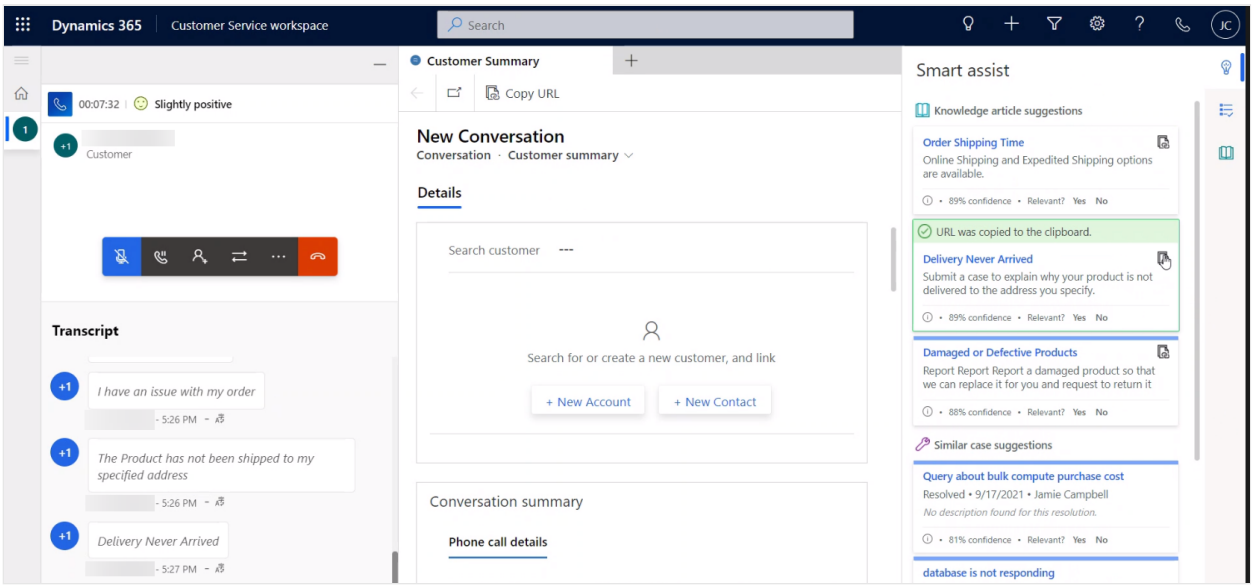
The following table lists the components of the smart assist card for AI-suggested knowledge articles.

Label	Description
1	Displays the information about the cards when selected.
2	Title of the related knowledge article. When selected, opens the knowledge article in an application tab.
3	More commands.
4	Displays the actions that can be performed when you select more commands.
5	A brief summary of the knowledge article that is generated by the AI model.
6	When selected, the link to the knowledge article is pasted in the conversation window that the agent can share with the customer.

Label	Description
7	Displays the confidence score based on which knowledge article was selected by the AI model. Usually, the suggested knowledge articles are highly relevant to the context of conversations when the confidence score is above 80%; suggestions with lower confidence score may still be relevant based on the semantic meaning of some key words in the conversation. The minimum confidence score is 65%.
8	The feedback from agents is used by the AI model to retrain and improve the suggestions over time. When agent selects **Yes**, the label is highlighted and the card remains on the pane. If agent selects **No**, the card is replaced with a new suggestion, if it exists.
9	Displays information on the keywords that were used by the AI model to match the article.

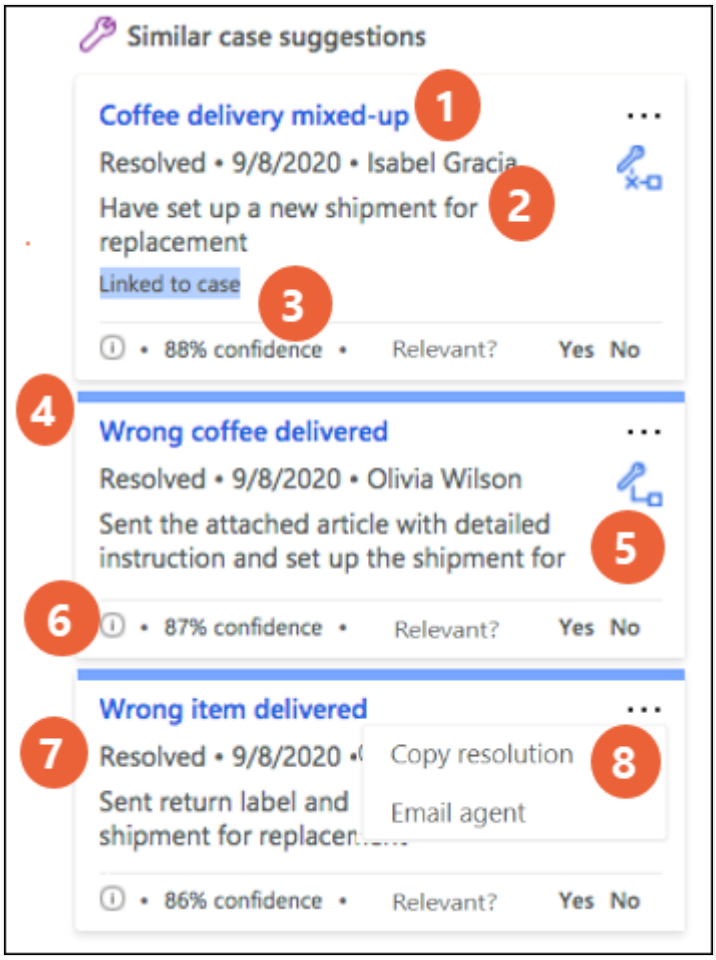
Understand the knowledge article components in smart assist for the voice channel

When you're on a call with a customer and want to share knowledge articles for the customer issue, you can select the **Copy URL** option on the **Smart assist** pane, whereby the article link gets copied to the clipboard. You can then email the link to your customer.



Understand the similar cases components in smart assist

When you're interacting with a customer in an ongoing conversation, up to three top similar cases that match the conversation context are displayed in the **Smart assist** pane. The suggestions are dynamically refreshed based on the conversation context.



The following table lists the components of the smart assist card for AI-suggested similar cases.

Label	Description
1	Title of the similar case. When selected, opens the **Active Conversation** form in an application tab.
2	Summary of the case resolution that is generated by the AI model.
3	The confidence score based on which the similar case was selected by the AI model. Usually, the suggested similar cases are highly relevant to the context of conversations when the confidence score is above 80%; suggestions with lower confidence score may still be relevant based on the semantic meaning of some key words in the conversation. The minimum confidence score is 65%.
4	A blue bar indicates that the user hasn't interacted with the card yet.
5	When selected, links to the current active case or removes the link to the similar case.
6	When selected, displays information on the keywords that were used by the AI model to match the article.
7	Status of the similar case.
8	The actions that can be performed when you select more commands.

If no cases match, then the card displays an appropriate message, such as "No suggestions found for similar cases."

See also

Enable AI-suggested cases and knowledge articles
Smart assist suggestions using bot user
Use agent dashboard and call controls in the voice channel

View smart assist suggestions

Article • 06/08/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Smart assist is an intelligent assistant that provides real-time recommendations to you, thereby helping you take actions during your interactions with customers. It shows relevant recommendations such as knowledge articles, similar cases, and the next-best steps.

By default, the productivity pane is enabled. The smart assist cards appear on the productivity pane.

How smart assist suggestions work

The smart assist bot interprets the conversation in the communication panel and provides real-time recommendations.

The recommendations appear in the user interface as cards. The most recent card (recommendation) appears at the top on the control. If you feel a recommendation doesn't meet the context of the conversation, you can choose to dismiss the card.

For a macro recommendation card, if the run is successful, a success message is displayed; otherwise, an error message is displayed in the user interface.

When a conversation is escalated from a bot, the agent needs to accept the request and start the conversation with the customer. Now, from this instance, the smart assist bot interprets the conversation in real time and provides recommendations.

See also

Smart assist for agents (admin)
View smart assist suggestions using AI

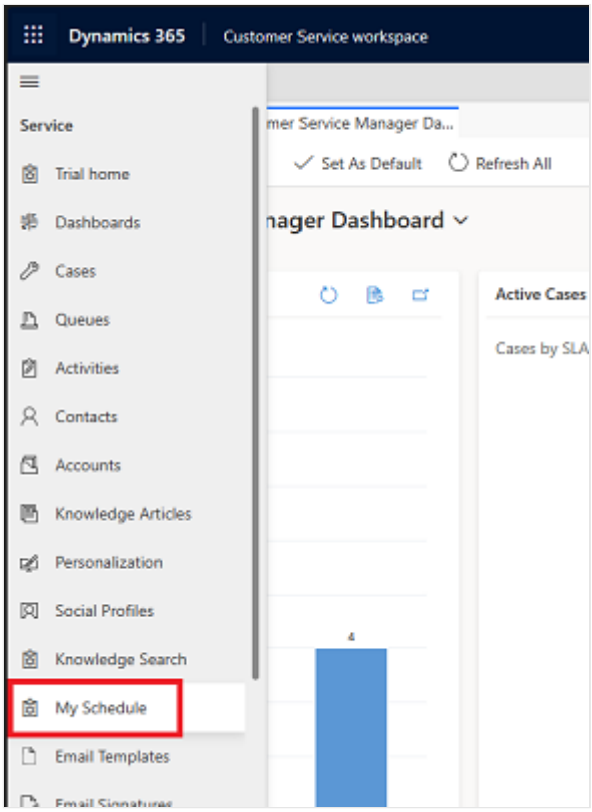
View the agent calendar

Article • 10/28/2023

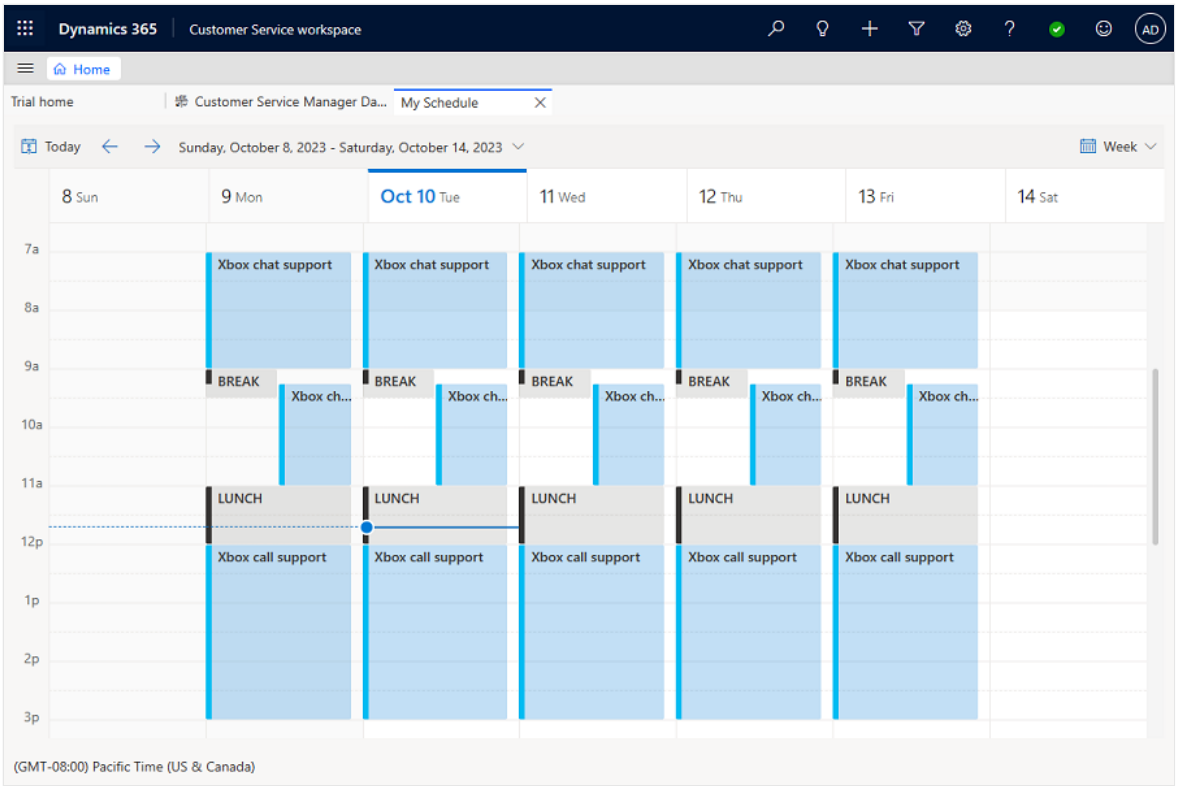
As an agent, it's helpful to know your work schedule, breaks, trainings, and other activities. If your administrator has enabled the calendar view, you can quickly see your work hours, nonwork hours, and any scheduled time off.

The calendar view is read-only and has daily, weekly, and monthly views. It also has an agenda view where you can see a list-type view of your schedule.

1. In Customer Service workspace, expand the site map, and then select **My Schedule**.



   The **My Schedule** page opens with a read-only calendar view of your work hours, nonwork hours, and any scheduled time off. Work hours are displayed in blue, and nonwork hours are displayed in gray.



2. (Optional) Use the top-right menu to change the view to agenda, daily, weekly, or monthly.

See also

Get started with Customer Service workspace

Configure the agent calendar view

Use agent diagnostics as a self-help tool (preview)

Article • 09/21/2023

[This article is prerelease documentation and is subject to change.]

> **Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

The agent diagnostics tool helps you identify and address issues in your environment. Use the tool to run a set of predefined rules from Microsoft to diagnose frequent issues. You can download a report to send to admins or support and reduce support tickets.

Out of the box, the following rules are available:

- App Profile Assignment
- Inbox
- Live Chat Communication
- Omnichannel Presence
- Omnichannel Provider URL
- Productivity Pane

One of the following rule result messages appear after you run the rules.

- **No issues found**: When the rule runs successfully.
- **Issue found**: When the rule identifies one or more issues.
- **Not reproduced**: When something unexpected occurs with the rule. You'll need to run the rule after refreshing the app. If the issue persists, contact your support team.

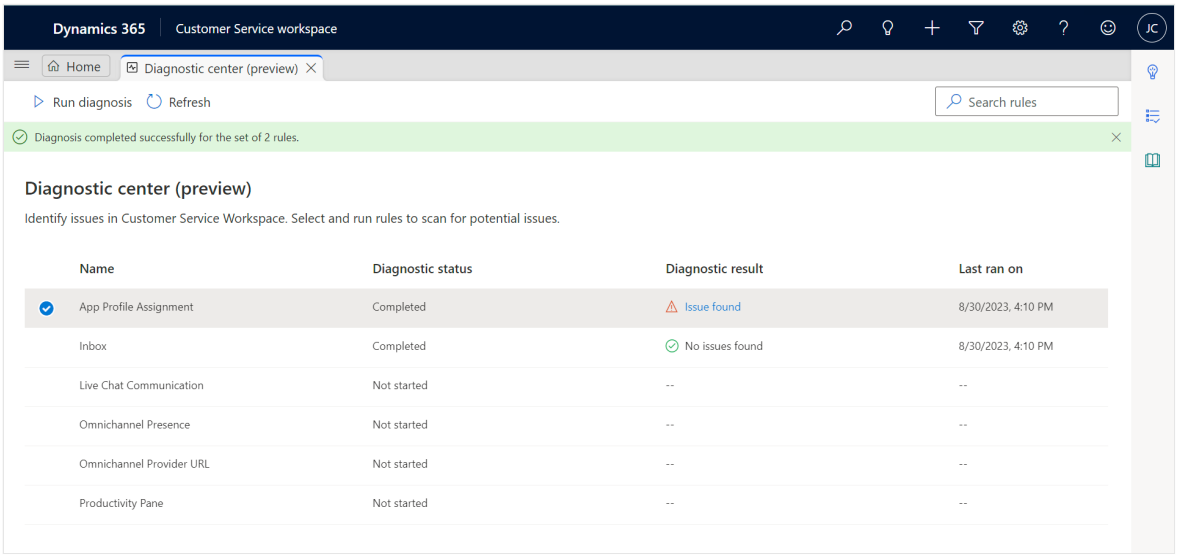
Run agent diagnostics

The rules that you can run in the agent app are specific to your permissions.

1. Sign in to Customer Service workspace.

2. After the presence loads, select **Ctrl**+**Shift**+**F12**. Optionally, you might need to select the **fn** key. The **Diagnostic center (preview)** page displays a list of tests.

3. Select one or more rules, and then select **Run diagnosis**. The rule results are displayed in the **Diagnostic result** column.



4. If you see a result as **Issue found**, select its link. The **Diagnostic Report** pane displays the issue details.

5. Select **Download Report**. The report details are available in a text file that you can share with the administrator.

6. Optionally, run the rule again after the administrator resolves the issue to make sure that no further issues are present.

See also

View the communication panel for conversations
Get started with Customer Service workspace

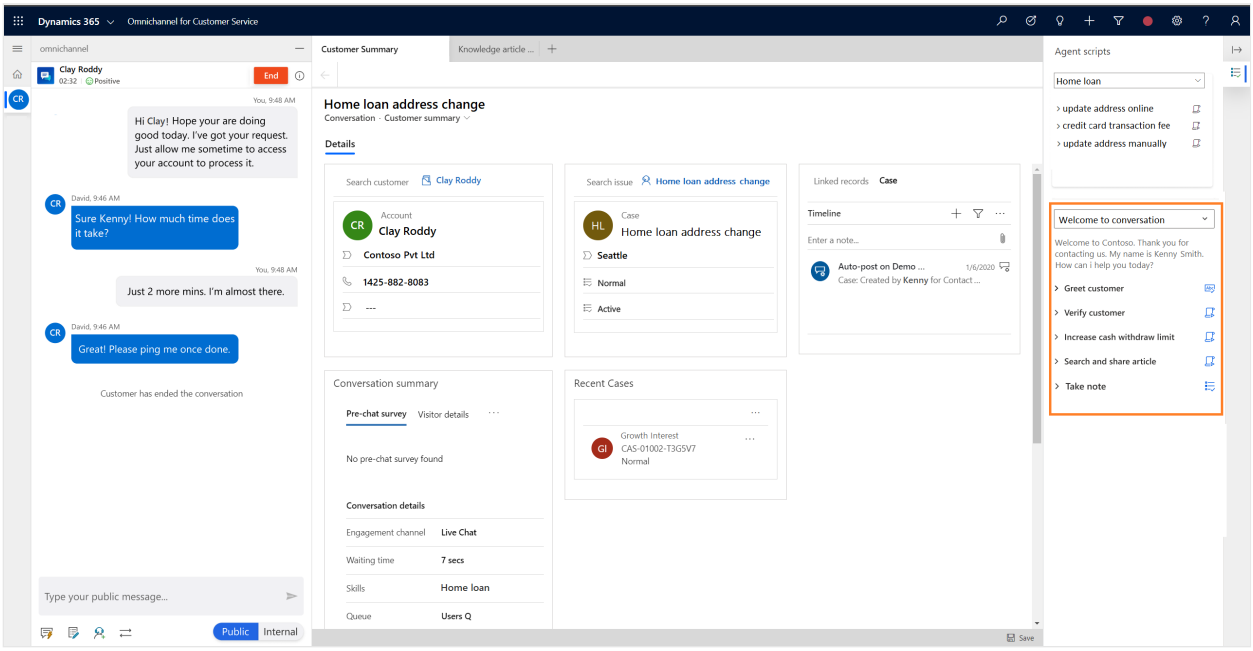
Guide customer interaction with agent scripts

Article • 05/26/2022

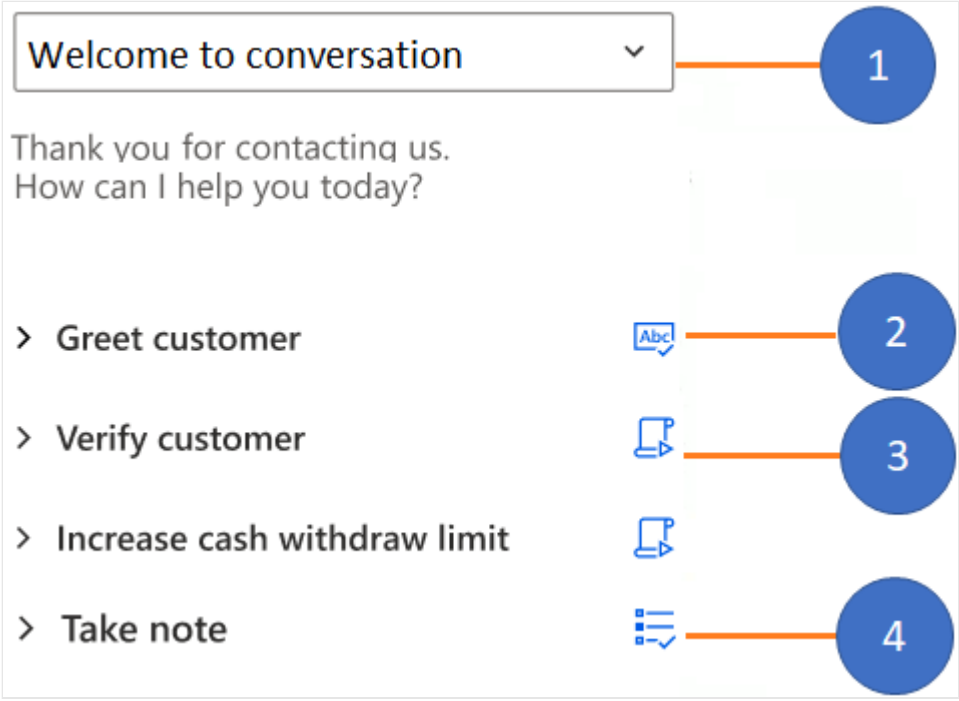
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Overview of agent scripts

Agent scripts in Omnichannel for Customer Service provide guidance about what you (an agent) should do when you get a customer issue and ensure that you share only accurate and company-endorsed information. Agent scripts help you be accurate, effective, and efficient in customer handling.



Components in agent script



1. Agent script menu
2. Text instructions
3. Macro
4. Agent script

The agent script section consists of a set of steps. Based on the type of agent script the administrator has configured, you might see the following types:

- Text instructions
- Macro
- Agent script

Each of the steps can be identified with the actionable icon. When you expand a step, the section displays a short description of what the step entails and the action you need to perform using the icons next to it. The step that is executed successfully is indicated with a green Tick icon, and the step that has an error is indicated with a red Cross icon. You can run the steps again as needed, and the final state of the step, green Tick or red Cross, is based on the last run.

Prerequisite

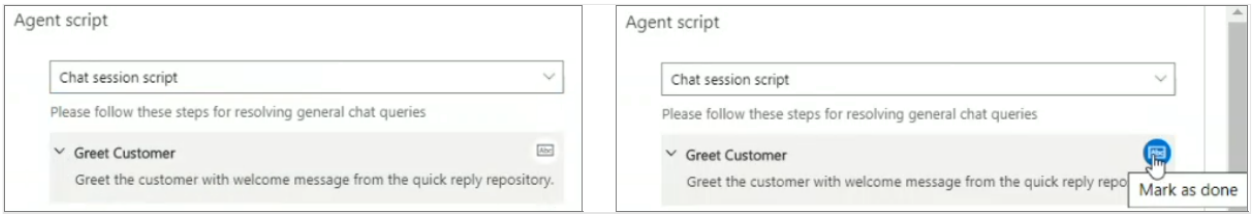
Ensure you (agent and supervisor) have the **Productivity tools user** security role. To learn more, see Assign roles and enable users.

Text instructions

The text instruction provides guidance on the actions you need to perform. The step in the agent script shows the title, instructions, and the Text instruction icon that is actionable. After you perform the step based on the instructions, you can select the **Mark as done** icon to indicate that you've completed the step.

Example:

Title	Action you need to perform
Greet customer	Greet the customer with welcome message from the quick reply repository.



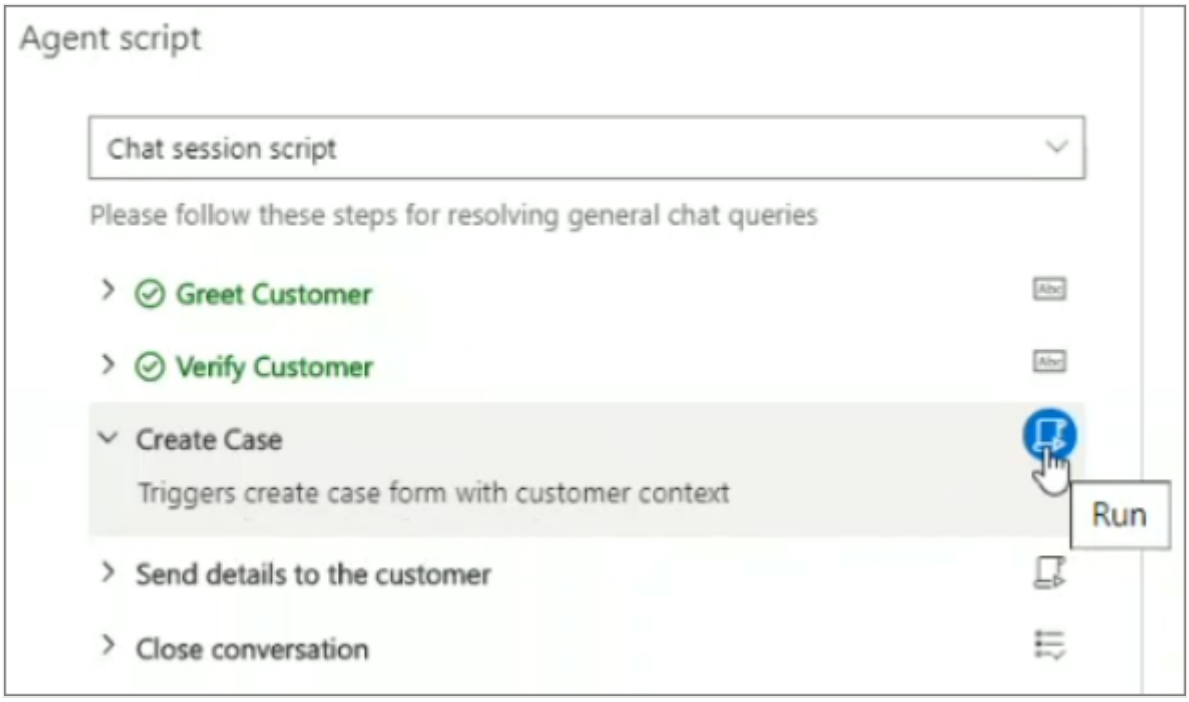
Macro

A macro is a set of instructions that tells the system how to complete a task. When a macro runs, the system performs each instruction. The **Macro** step in the agent script shows a title, instruction that system performs, and the macro icon. When you select **Run** icon, the system performs the macro.

Example:

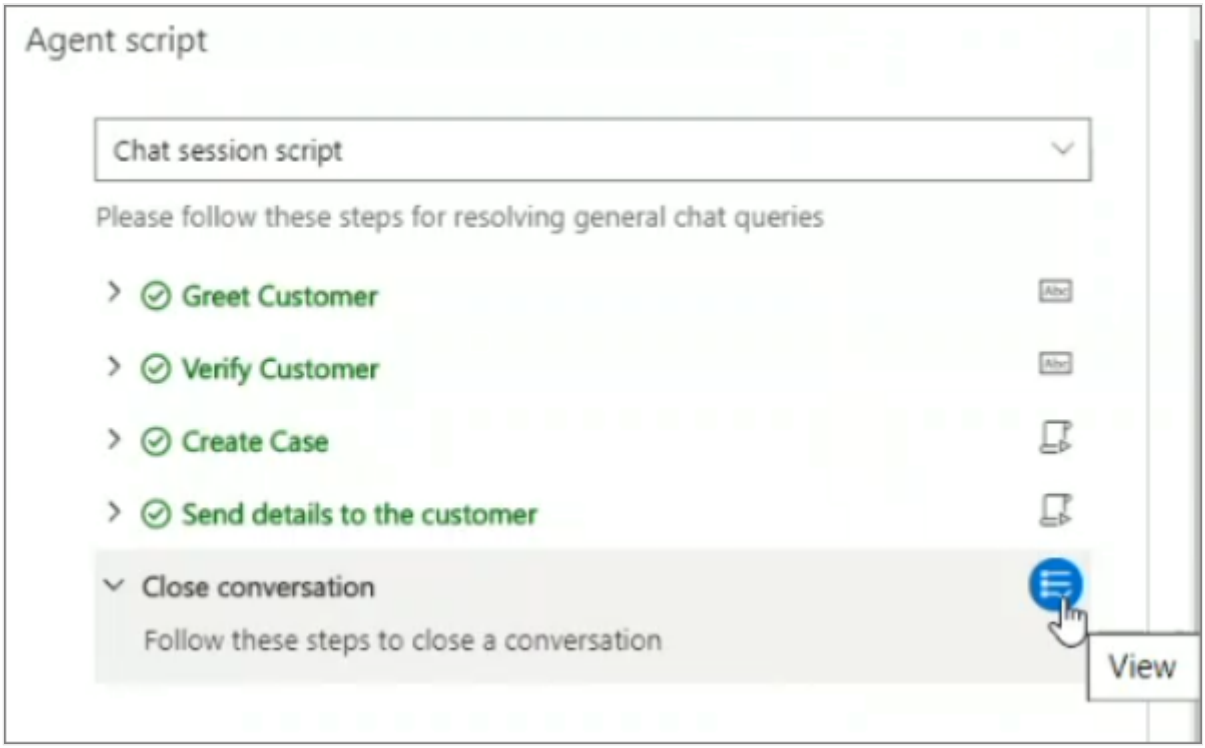
Title	Instruction system performs
Create case	Triggers create case from customer context

In this example, when an agent selects the **Macro** icon, the system opens a new **Create case** form in the application tab panel with prepopulated fields based on the customer context.



Agent script

The step is used to load another agent script from the current agent script. When you select the view icon, the system loads the agent script. You can see that newly loaded script replaces the current script in the Agent script menu.



Sample agent script

When you get an incoming conversation notification, you accept the conversation request and then a chat session starts. Now, the agent script is available in a form based

on the administrator configuration.

For example, if the administrator has configured agent scripts in the **Active Conversation** form, then you can view the agent script in the **Active Conversation** form.

Let's see the sample agent script:

- Chat session
- Close session

Below the menu you can see the description for the selected script.

When the Chat session script is selected, the step you see is:

Please follow these steps for resolving general chat queries

The **Chat session** script has the following steps

Step	Title	Instruction	Icon	Agent action
Text instruction	Greet Customer	Greet the customer with welcome message from the quick reply repository.	Mark as done	After you greet the customer, select the mark as done icon.
Text instruction	Verify Customer	Use any two of the following to verify the customer Kenny Smith: 1. Date of Birth 2. Email id 3. Zip code 4. Mobile	Mark as done	After you verify the customer, select the mark as done icon.
Macro	Create case	Triggers create case form with customer context	Run	When you select the run macro icon, the system opens a case form in a new application tab panel.
Macro	Send details to the customer	Opens email to send details to the customer	Run	When you select the run macro icon, the system opens an draft email so you can send an email to the linked customer.

Step	Title	Instruction	Icon	Agent action
Agent script	Close conversation	Follow these steps to close a conversation	View	When you select the view icon, the system loads another agent script from the current agent script. In this sample, the another agent script is **Close conversation** script.

Similarly, the administrator can create more agent scripts as per your business scenarios. To learn how to configure agent scripts, see Guide agents with scripts.

See also

Guide agents with scripts

Rich messages in conversation control

Article • 11/08/2022

When conversing in supported channels, the communication panel includes an additional feature for sending rich messages. These interactive messages can help you collect and share information with customers more easily.

> **ⓘ Important**
>
> Rich messages are currently supported only in the Apple Messages for Business channel.

Start using rich messages in your conversation with one of the following options:

- Select the **Rich messages** button to launch the rich message panel.
- Use a keyboard command to see the list of rich messages. Type "/rm" (forward slash followed by the letters "rm").

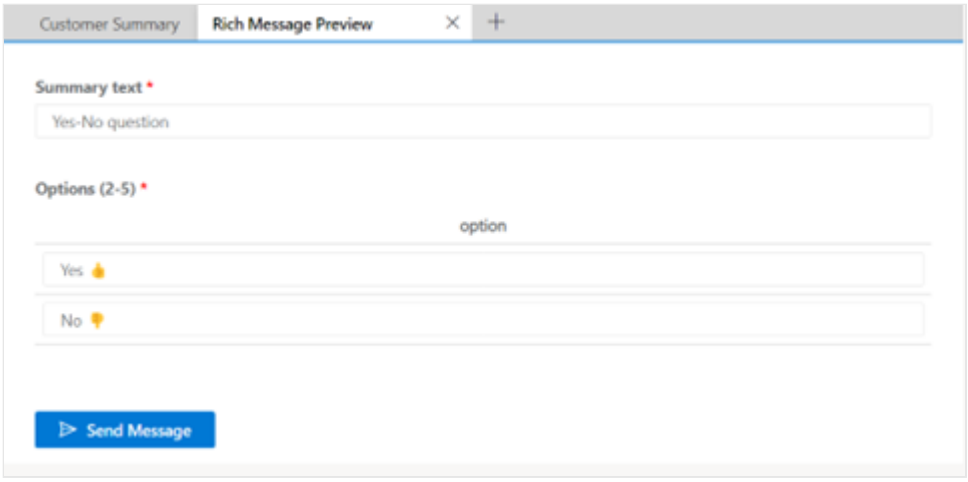
Search for rich messages and tags

After launching the rich message panel by selecting the rich message icon or typing /rm, you can type any of the following options in the compose box to search for relevant rich messages:

- Type "/rm", followed by <keyword>, to list messages that match the keyword.
- Type "/rm", followed by the number sign (#), to list all tags. All rich messages will have a tag containing their type.
- Type "/rm", followed by <tagname><keyword>, to list quick replies that match the tag and keyword.
- Type "/rm", followed by <tagname>, to list all rich messages that match the tag. Additionally, you can also add another tag after the <tagname>. For example, type "/rm", followed by <tagname> <tagname>, to further refine the rich messages matching both the tags.

View and send rich messages

When you find the rich message you want to send, you can select the rich message to open it. This will open the **Rich Message Preview** application pane.



Within the preview tab, you'll be able to see the contents of the rich message you've selected, along with a **Send Message** button. When you're ready to send a rich message, use **Send Message**.

If your administrator has enabled agent configuration, you can customize some types of rich messages before sending them. These customizations are single-use and aren't saved for the next time you send the same rich message.

> ⓘ Note
>
> As an agent, you must understand how customizable rich messages are constructed and how they appear on the customer's device before editing them.

Customizable rich messages

Some types of rich messages may need their content to be customized before they can be sent to customers. Others can be customized to add personalized touches or additional options that might change depending on context.

The following rich messages support admin-enabled customization:

Channel	Message type
Apple Messages for Business	List picker Suggested reply Time picker Video rich link Website rich link

See also

Configure Apple Messages for Business
Retrieve and format rich messages
Manage rich messages
Understand and create workstreams
Create and manage routing rules
Configure automated messages
Configure a post-conversation survey
Skill-based routing
Create message templates
Templates
Delete a configured channel
Support for live chat and asynchronous channels

Build a smart assist bot

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

To quickly get started, follow the instructions mentioned in this topic for building a smart assist bot that displays knowledge article recommendations to the agent. After this, you can do additional steps for creating custom scenarios.

Prerequisites

You must understand how to create a bot using Azure Bot Service.

Sample bot that displays knowledge article recommendations

For setting up a sample for smart assist bot for displaying knowledge article recommendations to the agent, please see the instructions mentioned in the sample README file.

For information on how to create a knowledge article using template, see Create a knowledge article using a template.

Sample bot that displays similar case recommendations

After setting up a sample bot using above steps, you can configure your bot to show similar case recommendations for 'printer noise' using the instructions mentioned in the topic Implement a custom scenario.

Important

See this administrator guide topic on how to enable smart assist: **Smart assist for agents**. It provides instructions on how to create a bot user, how to add a smart assist bot to a workstream and how to enable a productivity pane.

See Next: Implement a custom scenario for smart assist bot

See also

Sample code: Build a smart assist bot
Smart assist for agents
Create a bot with Azure bot service
Automate tasks with macros
Integrate an Azure bot
Create knowledge article template
Client API reference for model driven apps

Implement a custom scenario for smart assist bot

Article • 08/09/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This topic provides information on how you can enable similar case suggestions in your smart assist bot.

Prerequisites

> **Important**
>
> Read the topic **Build a smart assist bot** for information on how to get started with building a custom smart assist bot.

- You need to have an understanding on how to create a bot using Azure Bot Service.
- Create a LUIS app by following the instructions mentioned in Add natural language understanding to your bot. See the section Retrieve application information from the LUIS.ai portal for information on how to retrieve the values you need to setup the bot.

Scenario: Similar case suggestion

This scenario enables you to suggest similar cases with open case action button. The customer service agent is presented with a list of similar cases as a recommendation. The agent clicks on the case that they finds most similar and relevant, and then goes to the case note and looks at the resolution in note. The agent suggests the same resolution to the customer over chat.

Generate intent to interpret the context of the conversation

It is necessary analyze the conversation and understand its context before recommending an action to the agent. Use Language Understanding (LUIS) to find the intent of the ongoing conversation. Here is an example on how you can create a LUIS app to find intent from a given text: Quickstart: Use prebuilt Home automation app.

You can create intents for each issue type or topic that you want to address for incoming requests from customers or the most common topics being discussed.

For the example scenario of similar case recommendations for 'printer noise' issue, create an intent with the same name and add 10-15 examples like 'printer noise, loud noise from printer, printer making grinding noise, loud clicking noise, loud sound' etc. The LUIS app then needs to be trained for this intent.

Author adaptive cards to display recommendations in the smart assist UI

Adaptive cards is an open-source standard that helps apps and services exchange rich snippets of native UI.

Custom actions for implementing custom functionalities

Custom actions can help you implement custom functionalities in your smart assist bot.

Given below are the steps for enabling the similar case scenario.

1. **Set up Similarity Rules**

Setup similarity rule by following the steps 1 to 7 in mentioned here: Create a new similarity rule to view similar cases.

2. **Turn Relevance search ON**

Turn On Relevance Search in the administrator section. More information: Enable a field for exact matching of similar cases.

3. **Similar cases API**

Similar cases can be fetched using the `GetSimilarRecords` function. But before you execute the Web API query with this function, make sure that you have set up similarity rules. More information: Use advanced similarity rules to view similar case suggestions.

Also, make sure to enable **Relevance Search** in the administrator section to ensure that similarity rules work in the expected manner. Also, in the **Match Field** section add a few criteria such as case title and case type.

Request

HTTP

```
GET [Organization
URI]/api/data/v9.1/GetSimilarRecords(Id=@Id,Filter=@Filter,ReturnFields=@Ret
urnFields)?@Id={"@odata.id":"incidents(<incident
id>)"}&@Filter=null&@ReturnFields={"AllColumns":false,"Columns":
["title","description"]}
Accept: application/json
OData-MaxVersion: 4.0
OData-Version: 4.0
```

Replace the `incident id` in the Web API request above with the unique identifier of the case for which you want to find similar cases.

Response

JSON

```
{
    "@odata.context": "[Organization
URI]/api/data/v9.1/$metadata#incidents",
    "value": [
        {
            "@odata.type": "#Microsoft.Dynamics.CRM.incident",
            "@odata.etag": "W/\"1571835\"",
            "title": "Product question re warranty",
            "modifiedon": "2019-03-03T12:58:25Z",
            "incidentid": "f69e62a8-90df-e311-9565-a45d36fc5fe8"
        },
        {
            "@odata.type": "#Microsoft.Dynamics.CRM.incident",
            "@odata.etag": "W/\"1572750\"",
            "title": "Shipment question re order",
            "modifiedon": "2019-03-03T12:58:27Z",
            "incidentid": "129f62a8-90df-e311-9565-a45d36fc5fe8"
        }
    ]
}
```

Calling custom actions using adaptive cards

You will have to create a web resource if you want to use embed a custom action within a suggestion. See the Power Apps topic on Create your own actions for information on how to build a custom action. See the topic Web resources in model-driven apps for information on how to create web resources. These web resources will have to be uploaded under the **Active Conversation** form. Given below are the supported custom actions.

OpenForm custom action

This custom action enables you to open any entity record.

JSON

```
{
              "type": "Action.Submit",
              "title": "Open",
              "data": {
                            "CustomAction": "OpenForm",
                            "CustomParameters": {
                                          "entityName": "incident",
                                          "entityId": "c3356c37-bba6-4067-
b1a1-8c66e1c203a1",
                                          "data": {}
                            }
              }
}
```

SendKB custom action

This custom action enables you to send a knowledge base article.

> **Note**
>
> The `CustomAction` key should contain `SendKB` and `kbLink` key should contain the link of the KB article. You cannot have another custom action with the same name as `SendKB`.

JSON

```
{

          "type": "Action.Submit",
          "title": "Send",
          "data": {
                        "CustomAction": "SendKB",
                        "CustomParameters": {
                        "kbLink":
```

```
"https://ocddemoebc.powerappsportals.com/knowledgebase/article/KA-01011/en-
us"
                    }
            }
}
```

You can use the client-side APIs to open knowledge base articles. See Client API reference for model driven apps for more information.

See also

Build a smart assist bot
Sample code: Smart Assist for Bots
Smart assist for agents

Retrieve and format rich messages

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Because the Power Virtual Agents and Omnichannel for Customer Service platforms process rich messages differently, you'll need to modify the strings to get valid `MessageObject` type strings that can be sent via the `sendMessageToConversation` method to the conversation. You must process the rich message payload before sending it to the conversation, else the method will send the desired rich object payload in plain `String` format.

This articles describes how you can programmatically retrieve and format rich messages that can then be passed using the `MessageObject` type to the `sendMessageToConversation` method.

Retrieve the rich message payload

1. In Dynamics 365, go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Productivity** in **Agent experience**.
   b. On the **Productivity** page, select **Manage** for **Rich messages**.

2. From the list of all available list messages, select a rich message that you'd like to send to the conversation.

3. Select the **Details** tab and select **Copy** under the **Rich message JSON** field.

You'll use this JSON value when you format the rich message types.

Format rich messages

This section includes JSON samples for the rich message types available in the Apple Messages for Business channel in Omnichannel for Customer Service. More information: Manage rich messages

> **Note**
>
> You can't send rich messages of the Forms type to conversations.

Apple Pay

JavaScript

```
let applePayJSON = // <copy_and_paste_details_content>
applePayJSON.survey = { Questions: JSON.parse(applePayJSON.survey)
[0].Questions, Answers: JSON.parse(applePayJSON.survey)[1].Answers };
applePayJSON.survey.Answers.AppleMessagesforBusinessJSON =
JSON.parse(applePayJSON.survey.Answers.AppleMessagesforBusinessJSON);
applePayJSON.survey.Answers.AppleMessagesforBusinessJSON =
JSON.stringify(applePayJSON.survey.Answers.AppleMessagesforBusinessJSON);
applePayJSON.survey = JSON.stringify(applePayJSON.survey);

// Can now send this payload using the API
Microsoft.Omnichannel.sendMessageToConversation(applePayJSON, false);

// Or take the JSON elsewhere for use in bringing your own logic
copy(applePayJSON);
```

Authentication

JavaScript

```
let authJSON = // <copy_and_paste_details_content>
authJSON.survey = { Questions: JSON.parse(authJSON.survey)[0].Questions,
Answers: JSON.parse(authJSON.survey)[1].Answers };
authJSON.survey = JSON.stringify(authJSON.survey);

// Can now send this payload using the API
Microsoft.Omnichannel.sendMessageToConversation(authJSON, false);

// Or take the JSON elsewhere for use in bringing your own logic
copy(authJSON);
```

Custom JSON (iMessage Application)

JavaScript

```
let customJSON = // <copy_and_paste_details_content>
customJSON.survey = { Questions: JSON.parse(customJSON.survey)[0].Questions,
Answers: JSON.parse(customJSON.survey)[1].Answers };
customJSON.survey.Answers.AppleMessagesforBusinessJSON =
JSON.parse(customJSON.survey.Answers.AppleMessagesforBusinessJSON);
customJSON.survey.Answers.AppleMessagesforBusinessJSON =
JSON.stringify(customJSON.survey.Answers.AppleMessagesforBusinessJSON);
customJSON.survey = JSON.stringify(customJSON.survey);

// Can now send this payload using the API
Microsoft.Omnichannel.sendMessageToConversation(customJSON, false);

// Or take the JSON elsewhere for use in bringing your own logic
copy(customJSON);
```

List Picker

JavaScript

```
listPickerJSON = // <copy_and_paste_details_content>
listPickerJSON.survey = { Questions: JSON.parse(lpFromDetails.survey)
[0].Questions, Answers: JSON.parse(listPickerJSON.survey)[1].Answers };
listPickerJSON.survey = JSON.stringify(listPickerJSON.survey);

// Can now send this payload using the API
Microsoft.Omnichannel.sendMessageToConversation(listPickerJSON, false);

// Or take the JSON elsewhere for use in bringing your own logic
copy(listPickerJSON);
```

Suggested Reply

JavaScript

```
suggestedReplyJSON = // <copy_and_paste_details_content>
suggestedReplyJSON.survey = { Questions:
JSON.parse(suggestedReplyJSON.survey)[0].Questions, Answers:
JSON.parse(suggestedReplyJSON.survey)[1].Answers };
suggestedReplyJSON.survey = JSON.stringify(suggestedReplyJSON.survey);

// Can now send this payload using the API
Microsoft.Omnichannel.sendMessageToConversation(suggestedReplyJSON, false);

// Or take the JSON elsewhere for use in bringing your own logic
copy(suggestedReplyJSON);
```

Time Picker

JavaScript

```
timePickerJSON = // <copy_and_paste_details_content>
timePickerJSON.survey = { Questions: JSON.parse(timePickerJSON.survey)
[0].Questions, Answers: JSON.parse(timePickerJSON.survey)[1].Answers };
timePickerJSON.survey = JSON.stringify(timePickerJSON.survey);

// Can now send this payload using the API
Microsoft.Omnichannel.sendMessageToConversation(timePickerJSON, false);

// Or take the JSON elsewhere for use in bringing your own logic
copy(timePickerJSON);
```

Video Rich Link

JavaScript

```
videoRichLinkJSON = // <copy_and_paste_details_content>
videoRichLinkJSON.survey = { Questions: JSON.parse(videoRichLinkJSON.survey)
[0].Questions, Answers: JSON.parse(videoRichLinkJSON.survey)[1].Answers };
timePickerJSON.survey = JSON.stringify(videoRichLinkJSON.survey);

// Can now send this payload using the API
Microsoft.Omnichannel.sendMessageToConversation(videoRichLinkJSON, false);

// Or take the JSON elsewhere for use in bringing your own logic
copy(videoRichLinkJSON);
```

Website Rich Link

JavaScript

```
websiteRichLinkJSON = // <copy_and_paste_details_content>
websiteRichLinkJSON.survey = { Questions:
JSON.parse(websiteRichLinkJSON.survey)[0].Questions, Answers:
JSON.parse(websiteRichLinkJSON.survey)[1].Answers };
timePickerJSON.survey = JSON.stringify(websiteRichLinkJSON.survey);

// Can now send this payload using the API
Microsoft.Omnichannel.sendMessageToConversation(websiteRichLinkJSON, false);

// Or take the JSON elsewhere for use in bringing your own logic
copy(websiteRichLinkJSON);
```

See also

Live chat SDK JavaScript API reference
Omnichannel JavaScript API reference
sendMessageToConversation

Manage Copilot features in Customer Service

Article • 10/20/2023

Copilot in Customer Service provides real-time AI assistance that helps agents automate time-consuming tasks to handle cases efficiently and resolve issues faster so that they can deliver value to customers.

Enable the Copilot features for agents to use Copilot to:

- Respond to questions
- Compose an email
- Draft a chat response
- Summarize a case and conversation

> **Note**
>
> Respond to questions, Compose an email, and summarize case and conversations are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

License requirements

Requirement type	You must have
License	• Dynamics 365 Customer Service Enterprise for summarize cases, ask a question, draft emails, and copilot analytics • Customer Service add-in (Chat, Digital Messaging, or Voice) for draft a chat response and summarize conversations

Prerequisites

- You have the System Administrator role.
- Knowledge management is configured in your environment.
- Your knowledge article parameters are as follows:
  - Updated with the latest version
  - The state is set to Published

- The locale is set to English

Region availability and supported languages

Copilot AI features are available by default to only those customers with environments that have United States as their geography for data processing and storage. See: Region availability of analytics and insights.

For enabling the Copilot features outside the United States, see Copilot data movement across geographies.

To learn about supported languages for Copilot, see Language support for AI-based analytics and insights in Customer Service.

Enable public preview for geographies outside of United States

1. Enable cross geo support based on your location.
2. Go to Power Platform admin center and select **Environments**.
3. Select the environment in which you'd like to enable the copilot features, and then copy the value of the **Organization ID**.
4. Email a request to `d365_csaipreview@microsoft.com` with your **Organization ID** to enable the preview.

Opt in to continue with Copilot setup

Before you enable a Copilot feature, review the terms and conditions, and then provide your consent to use Copilot. To opt in, go to the **Copilot help pane** or **Summaries** pages in Customer Service admin center, and then select **Opt in** to continue with the setup.

Record feedback

In the **Summaries** and **Copilot help pane** configuration pages, you can select **Record transcripts of agent interaction with Copilot, agent actions, and agent feedback on AI suggestions** to record and understand how agents are interacting with Copilot and how Copilot is performing in a support organization. Agents can also share feedback about Copilot actions, which helps Copilot perform better. You can use the data to analyze knowledge sources, and also build usage reports.

Make Copilot available to agents

For agents to be able to use the copilot help pane and copilot summaries in Customer Service workspace, you need to enable the copilot features in agent experience profiles. For Customer Service Hub, when you enable the feature, it will be available to all the agents.

1. Go to Agent experience profiles in **Agent experience** > **Workspaces**.
2. Select the required agent experience profile.
3. In the **Productivity Pane**, select **Turn On** for **Copilot**. The **Copilot AI features** section appears.
4. In **Copilot AI features**, select the required features **Ask a question**, **Scan customer conversation and suggest a response**, **Write an email**, **Case summary**, **Live conversation summary**, you want to enable for that profile.

Assign roles and privileges

Out of the box, users with the Customer Service Representative role only can use the copilot features. Therefore, make sure that users with custom roles have the following privileges:

- prvCreatemsdyn_copilotinteraction
- prvAppendmsdyn_copilotinteraction
- prvCreatemsdyn_copilotinteractiondata
- prvReadmsdyn_copilotagentpreference
- prvCreatemsdyn_copilotagentpreference
- prvWritemsdyn_copilotagentpreference
- prvReadmsdyn_agentcopilotsetting
- prvReadmsdyn_copilotsummarizationsetting
- prvReadmsdyn_conversationinsight
- prvWritemsdyn_copilottranscriptdata
- prvAppendTomsdyn_copilottranscriptdata
- prvReadmsdyn_copilottranscript
- prvCreatemsdyn_copilottranscript
- prvWritemsdyn_copilottranscript
- prvAppendTomsdyn_copilottranscript
- prvReadmsdyn_copilottranscriptdata
- prvCreatemsdyn_copilottranscriptdata
- prvWritemsdyn_copilottranscriptdata
- prvAppendmsdyn_copilottranscriptdata
- prvIntelligenceUsage

More information: Security roles and privileges

Data sharing for copilot features

You can enable data sharing for Dynamics 365 copilot features in the Power Platform admin center. This allows Microsoft to capture and manually review customer data including, but not limited to, users' natural language inputs, outputs, and related telemetry to build, improve, and/or validate Microsoft's features, services, machine learning models, and related systems for Dynamics 365 and Power Platform Copilot AI features. We don't use customer data to train Azure OpenAI Service foundation models.

More information: Tenant settings and FAQ for optional data sharing for Copilot AI features in Dynamics 365 and Power Platform

Next steps

Display Copilot case summary on custom case forms
Use Copilot features
Responsible AI FAQ for copilot features

Enable Copilot case and conversation summaries

Article • 10/18/2023

Copilot case and conversation summaries help you to quickly understand the context of a case and resolve customer issues more efficiently.

> ⓘ **Note**
>
> Copilot conversation and case summaries are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

Enable case summaries

Case summaries help agents understand the context of a case, enabling them to resolve customer issues efficiently. Agents get a concise summary of the case with the case title, customer, case subject, product, priority, case type, and case description.

1. In Customer Service admin center, select **Make Copilot available to agents** in **Copilot help pane (preview)** for Copilot case summaries to be available.
2. Use one of the following navigation options:

    - **Agent Experience** > **Productivity** > **Summaries**
    - **Operations** > **Insights** > **Summaries**

3. Select **Manage** in **Summaries**.
4. Select **Make case summaries available to agents** to display a summary of the case on the **Case** page.

Perform the steps in Display case summary on custom case forms for the Copilot case summary to be displayed on custom case forms.

Enable conversation summaries

Conversation summaries enable agents to collaborate effectively with other agents and contacts, by enabling agents to easily recap an ongoing chat or a transcribed voice conversation.

For Copilot to automatically trigger a conversation summary for a live conversation, in Customer Service admin center, select the following options on the **Summaries** page:

- **When an agent joins a conversation**: Generates a summary when an agent joins a conversation. A summary is also generated when the primary agent invites a collaborator and a second agent joins the conversation or when the primary agent transfers a conversation.
- **When a conversation ends**: Generates a summary when the conversation ends.
  - Select **Allow agents to create case with a button in the summary** to allow agents to see the **Create case** button in the conversation summary. A new case is created when the agent selects **Create case**.
- **On demand, by selecting a button to summarize the conversation**: Generate a summary at any point in the conversation, whenever the agent selects the copilot **Summarize conversation**.

Next steps

Use Copilot to summarize cases and conversations Enable features in Copilot pane

Enable Copilot case and conversation summaries

Article • 10/18/2023

Copilot case and conversation summaries help you to quickly understand the context of a case and resolve customer issues more efficiently.

> ⓘ **Note**
>
> Copilot conversation and case summaries are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

Enable case summaries

Case summaries help agents understand the context of a case, enabling them to resolve customer issues efficiently. Agents get a concise summary of the case with the case title, customer, case subject, product, priority, case type, and case description.

1. In Customer Service admin center, select **Make Copilot available to agents** in **Copilot help pane (preview)** for Copilot case summaries to be available.
2. Use one of the following navigation options:

    - **Agent Experience** > **Productivity** > **Summaries**
    - **Operations** > **Insights** > **Summaries**

3. Select **Manage** in **Summaries**.
4. Select **Make case summaries available to agents** to display a summary of the case on the **Case** page.

Perform the steps in Display case summary on custom case forms for the Copilot case summary to be displayed on custom case forms.

Enable conversation summaries

Conversation summaries enable agents to collaborate effectively with other agents and contacts, by enabling agents to easily recap an ongoing chat or a transcribed voice conversation.

For Copilot to automatically trigger a conversation summary for a live conversation, in Customer Service admin center, select the following options on the **Summaries** page:

- **When an agent joins a conversation**: Generates a summary when an agent joins a conversation. A summary is also generated when the primary agent invites a collaborator and a second agent joins the conversation or when the primary agent transfers a conversation.
- **When a conversation ends**: Generates a summary when the conversation ends.
  - Select **Allow agents to create case with a button in the summary** to allow agents to see the **Create case** button in the conversation summary. A new case is created when the agent selects **Create case**.
- **On demand, by selecting a button to summarize the conversation**: Generate a summary at any point in the conversation, whenever the agent selects the copilot **Summarize conversation**.

Next steps

Use Copilot to summarize cases and conversations Enable features in Copilot pane

Enable features in Copilot pane

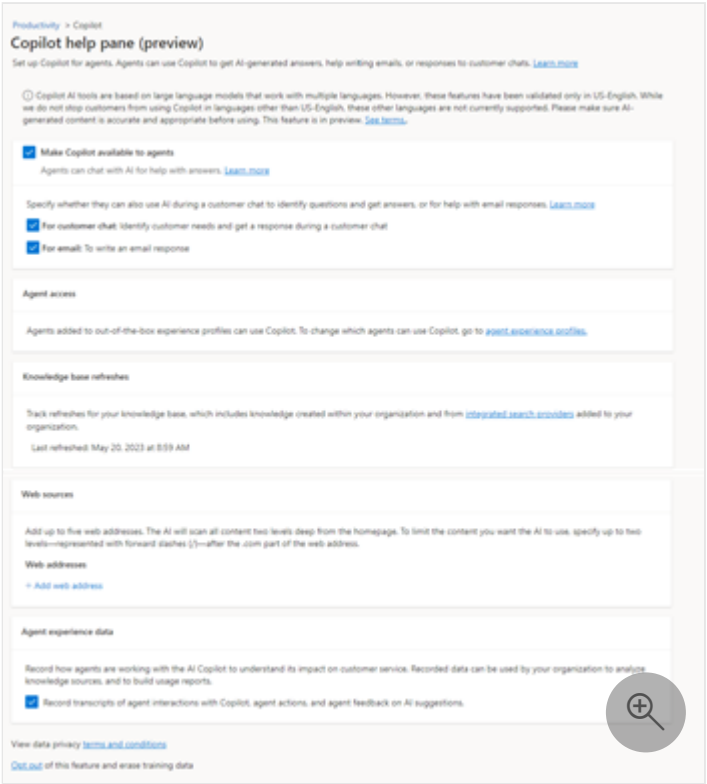
Article • 10/20/2023

The Copilot help pane allows agents to use Copilot features such as respond to questions, compose an email, and draft a chat response in Customer Service workspace.

> **Note**
>
> Respond to questions and compose an email features are generally available in the North America region only. These features are in preview in the rest of the supported regions.

Perform the following steps to enable the Copilot features in Customer Service admin center:

1. Use one of the following navigation options:
    - **Agent Experience** > **Productivity** > **Copilot help pane**
    - **Operations** > **Insights** > **Copilot help pane**
2. Select **Manage** in **Copilot help pane**. The **Copilot help pane** page appears. You can select the Copilot features you'd like to enable for agents on this page.



Features supported with different knowledge sources

The following table summarizes the Copilot features supported for a configured knowledge source.

Feature	Knowledge base	External web resources
Ask a question	✓	X
Write an email	✓	✓
Draft a response	✓	✓

Enable ask a question

Select **Make Copilot available to agents** in the **Copilot help pane** page of Customer Service admin center. The **Ask a question** tab on the **Copilot help pane** appears when agents sign in to Customer Service workspace. Agents can ask questions conversationally, and Copilot answers the questions based on the internal and external knowledge base sources and trusted domains.

Enable draft a response (Preview)

> **ⓘ Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Select **For customer chat** in the **Copilot help pane** page of Customer Service admin center. The one-click response generation button appears on both the conversation panel for a conversation and on the **Ask a question** tab on the Copilot help pane in Customer Service workspace. Copilot retrieves the context and drafts the response based on the knowledge resources configured for your organization.

Enable write an email

Select **For email** in the **Copilot help pane** page of Customer Service admin center. The **Write an email** tab appears on **Copilot help pane** in Customer Service. Copilot helps agents create email responses based on the context of the case.

Add trusted webpages as sources

You can select **Add web address** in **Web resources** to add trusted domains. You can add up to five trusted web domains for Copilot to search and generate responses from. Copilot searches for information up to two levels down from the configured domain.

Copilot uses articles that are two nodes down the configured domain.

> **Note**
>
> - The knowledge base content is refreshed every day.
> - Web domains are used by Copilot to only draft emails and chat replies.

Set up filters

Filters enable Copilot to generate responses based on a specific set of topics. You can set up filters for ask a question and draft a response features by sending an email a request to d365_csaipreview@microsoft.com. See: Apply filters.

Next steps

Use Copilot to solve customer issues

Enable features in Copilot pane

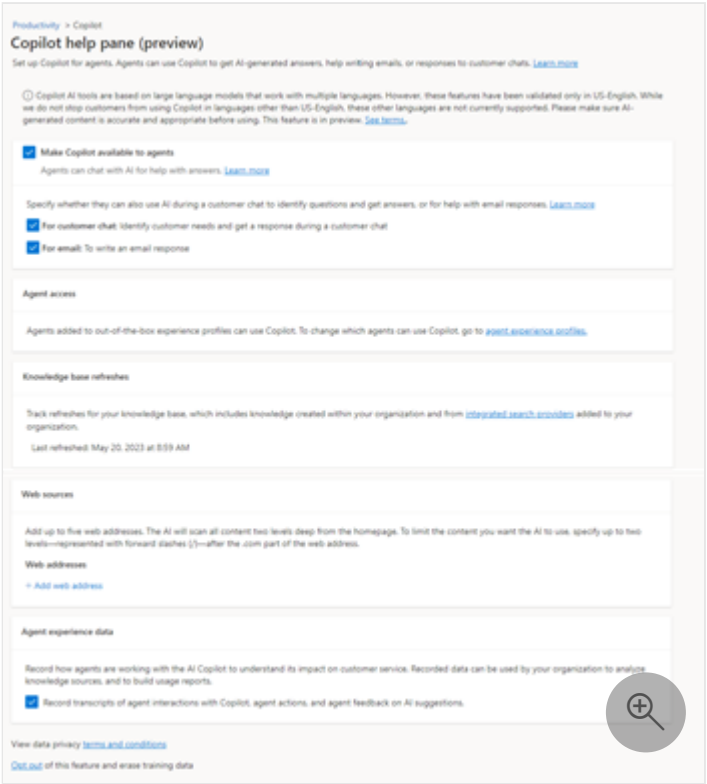
Article • 10/20/2023

The Copilot help pane allows agents to use Copilot features such as respond to questions, compose an email, and draft a chat response in Customer Service workspace.

> **Note**
>
> Respond to questions and compose an email features are generally available in the North America region only. These features are in preview in the rest of the supported regions.

Perform the following steps to enable the Copilot features in Customer Service admin center:

1. Use one of the following navigation options:
    - **Agent Experience** > **Productivity** > **Copilot help pane**
    - **Operations** > **Insights** > **Copilot help pane**
2. Select **Manage** in **Copilot help pane**. The **Copilot help pane** page appears. You can select the Copilot features you'd like to enable for agents on this page.



Features supported with different knowledge sources

The following table summarizes the Copilot features supported for a configured knowledge source.

Feature	Knowledge base	External web resources
Ask a question	✓	X
Write an email	✓	✓
Draft a response	✓	✓

Enable ask a question

Select **Make Copilot available to agents** in the **Copilot help pane** page of Customer Service admin center. The **Ask a question** tab on the **Copilot help pane** appears when agents sign in to Customer Service workspace. Agents can ask questions conversationally, and Copilot answers the questions based on the internal and external knowledge base sources and trusted domains.

Enable draft a response (Preview)

> **ⓘ Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Select **For customer chat** in the **Copilot help pane** page of Customer Service admin center. The one-click response generation button appears on both the conversation panel for a conversation and on the **Ask a question** tab on the Copilot help pane in Customer Service workspace. Copilot retrieves the context and drafts the response based on the knowledge resources configured for your organization.

Enable write an email

Select **For email** in the **Copilot help pane** page of Customer Service admin center. The **Write an email** tab appears on **Copilot help pane** in Customer Service. Copilot helps agents create email responses based on the context of the case.

Add trusted webpages as sources

You can select **Add web address** in **Web resources** to add trusted domains. You can add up to five trusted web domains for Copilot to search and generate responses from. Copilot searches for information up to two levels down from the configured domain.

Copilot uses articles that are two nodes down the configured domain.

> **Note**
>
> - The knowledge base content is refreshed every day.
> - Web domains are used by Copilot to only draft emails and chat replies.

Set up filters

Filters enable Copilot to generate responses based on a specific set of topics. You can set up filters for ask a question and draft a response features by sending an email a request to d365_csaipreview@microsoft.com. See: Apply filters.

Next steps

Use Copilot to solve customer issues

Enable features in Copilot pane

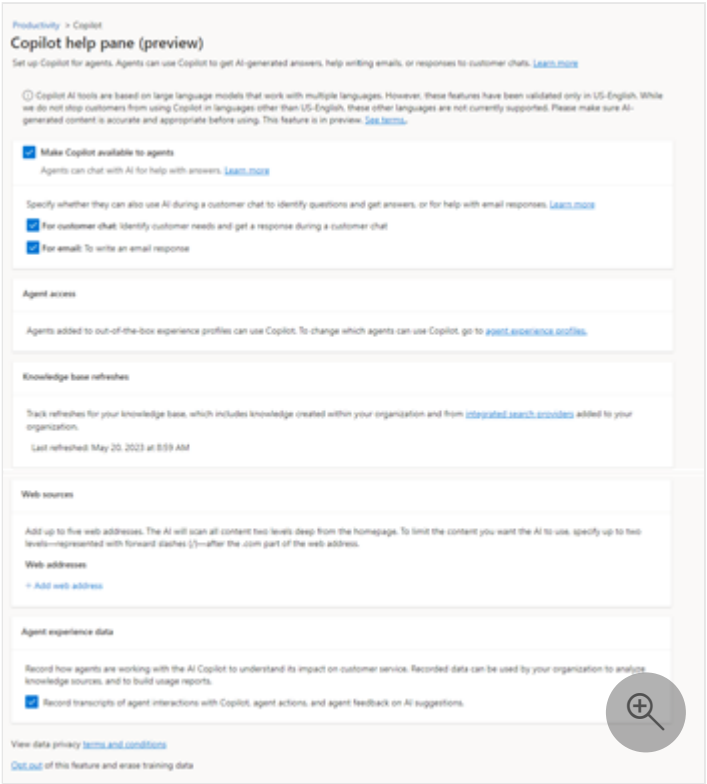
Article • 10/20/2023

The Copilot help pane allows agents to use Copilot features such as respond to questions, compose an email, and draft a chat response in Customer Service workspace.

> **Note**
>
> Respond to questions and compose an email features are generally available in the North America region only. These features are in preview in the rest of the supported regions.

Perform the following steps to enable the Copilot features in Customer Service admin center:

1. Use one of the following navigation options:
    - **Agent Experience** > **Productivity** > **Copilot help pane**
    - **Operations** > **Insights** > **Copilot help pane**
2. Select **Manage** in **Copilot help pane**. The **Copilot help pane** page appears. You can select the Copilot features you'd like to enable for agents on this page.



Features supported with different knowledge sources

The following table summarizes the Copilot features supported for a configured knowledge source.

Feature	Knowledge base	External web resources
Ask a question	✓	X
Write an email	✓	✓
Draft a response	✓	✓

Enable ask a question

Select **Make Copilot available to agents** in the **Copilot help pane** page of Customer Service admin center. The **Ask a question** tab on the **Copilot help pane** appears when agents sign in to Customer Service workspace. Agents can ask questions conversationally, and Copilot answers the questions based on the internal and external knowledge base sources and trusted domains.

Enable draft a response (Preview)

> **ⓘ Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Select **For customer chat** in the **Copilot help pane** page of Customer Service admin center. The one-click response generation button appears on both the conversation panel for a conversation and on the **Ask a question** tab on the Copilot help pane in Customer Service workspace. Copilot retrieves the context and drafts the response based on the knowledge resources configured for your organization.

Enable write an email

Select **For email** in the **Copilot help pane** page of Customer Service admin center. The **Write an email** tab appears on **Copilot help pane** in Customer Service. Copilot helps agents create email responses based on the context of the case.

Add trusted webpages as sources

You can select **Add web address** in **Web resources** to add trusted domains. You can add up to five trusted web domains for Copilot to search and generate responses from. Copilot searches for information up to two levels down from the configured domain.

Copilot uses articles that are two nodes down the configured domain.

> **Note**
>
> - The knowledge base content is refreshed every day.
> - Web domains are used by Copilot to only draft emails and chat replies.

Set up filters

Filters enable Copilot to generate responses based on a specific set of topics. You can set up filters for ask a question and draft a response features by sending an email a request to d365_csaipreview@microsoft.com. See: Apply filters.

Next steps

Use Copilot to solve customer issues

Manage Copilot features in Customer Service

Article • 10/20/2023

Copilot in Customer Service provides real-time AI assistance that helps agents automate time-consuming tasks to handle cases efficiently and resolve issues faster so that they can deliver value to customers.

Enable the Copilot features for agents to use Copilot to:

- Respond to questions
- Compose an email
- Draft a chat response
- Summarize a case and conversation

> **Note**
>
> Respond to questions, Compose an email, and summarize case and conversations are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

License requirements

Requirement type	You must have
License	• Dynamics 365 Customer Service Enterprise for summarize cases, ask a question, draft emails, and copilot analytics • Customer Service add-in (Chat, Digital Messaging, or Voice) for draft a chat response and summarize conversations

Prerequisites

- You have the System Administrator role.
- Knowledge management is configured in your environment.
- Your knowledge article parameters are as follows:
  - Updated with the latest version
  - The state is set to Published

- The locale is set to English

Region availability and supported languages

Copilot AI features are available by default to only those customers with environments that have United States as their geography for data processing and storage. See: Region availability of analytics and insights.

For enabling the Copilot features outside the United States, see Copilot data movement across geographies.

To learn about supported languages for Copilot, see Language support for AI-based analytics and insights in Customer Service.

Enable public preview for geographies outside of United States

1. Enable cross geo support based on your location.
2. Go to Power Platform admin center and select **Environments**.
3. Select the environment in which you'd like to enable the copilot features, and then copy the value of the **Organization ID**.
4. Email a request to `d365_csaipreview@microsoft.com` with your **Organization ID** to enable the preview.

Opt in to continue with Copilot setup

Before you enable a Copilot feature, review the terms and conditions, and then provide your consent to use Copilot. To opt in, go to the **Copilot help pane** or **Summaries** pages in Customer Service admin center, and then select **Opt in** to continue with the setup.

Record feedback

In the **Summaries** and **Copilot help pane** configuration pages, you can select **Record transcripts of agent interaction with Copilot, agent actions, and agent feedback on AI suggestions** to record and understand how agents are interacting with Copilot and how Copilot is performing in a support organization. Agents can also share feedback about Copilot actions, which helps Copilot perform better. You can use the data to analyze knowledge sources, and also build usage reports.

Make Copilot available to agents

For agents to be able to use the copilot help pane and copilot summaries in Customer Service workspace, you need to enable the copilot features in agent experience profiles. For Customer Service Hub, when you enable the feature, it will be available to all the agents.

1. Go to Agent experience profiles in **Agent experience** > **Workspaces**.
2. Select the required agent experience profile.
3. In the **Productivity Pane**, select **Turn On** for **Copilot**. The **Copilot AI features** section appears.
4. In **Copilot AI features**, select the required features **Ask a question**, **Scan customer conversation and suggest a response**, **Write an email**, **Case summary**, **Live conversation summary**, you want to enable for that profile.

Assign roles and privileges

Out of the box, users with the Customer Service Representative role only can use the copilot features. Therefore, make sure that users with custom roles have the following privileges:

- prvCreatemsdyn_copilotinteraction
- prvAppendmsdyn_copilotinteraction
- prvCreatemsdyn_copilotinteractiondata
- prvReadmsdyn_copilotagentpreference
- prvCreatemsdyn_copilotagentpreference
- prvWritemsdyn_copilotagentpreference
- prvReadmsdyn_agentcopilotsetting
- prvReadmsdyn_copilotsummarizationsetting
- prvReadmsdyn_conversationinsight
- prvWritemsdyn_copilottranscriptdata
- prvAppendTomsdyn_copilottranscriptdata
- prvReadmsdyn_copilottranscript
- prvCreatemsdyn_copilottranscript
- prvWritemsdyn_copilottranscript
- prvAppendTomsdyn_copilottranscript
- prvReadmsdyn_copilottranscriptdata
- prvCreatemsdyn_copilottranscriptdata
- prvWritemsdyn_copilottranscriptdata
- prvAppendmsdyn_copilottranscriptdata
- prvIntelligenceUsage

More information: Security roles and privileges

Data sharing for copilot features

You can enable data sharing for Dynamics 365 copilot features in the Power Platform admin center. This allows Microsoft to capture and manually review customer data including, but not limited to, users' natural language inputs, outputs, and related telemetry to build, improve, and/or validate Microsoft's features, services, machine learning models, and related systems for Dynamics 365 and Power Platform Copilot AI features. We don't use customer data to train Azure OpenAI Service foundation models.

More information: Tenant settings and FAQ for optional data sharing for Copilot AI features in Dynamics 365 and Power Platform

Next steps

Display Copilot case summary on custom case forms
Use Copilot features
Responsible AI FAQ for copilot features

Manage Copilot features in Customer Service

Article • 10/20/2023

Copilot in Customer Service provides real-time AI assistance that helps agents automate time-consuming tasks to handle cases efficiently and resolve issues faster so that they can deliver value to customers.

Enable the Copilot features for agents to use Copilot to:

- Respond to questions
- Compose an email
- Draft a chat response
- Summarize a case and conversation

> **Note**
>
> Respond to questions, Compose an email, and summarize case and conversations are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

License requirements

Requirement type	You must have
License	• Dynamics 365 Customer Service Enterprise for summarize cases, ask a question, draft emails, and copilot analytics • Customer Service add-in (Chat, Digital Messaging, or Voice) for draft a chat response and summarize conversations

Prerequisites

- You have the System Administrator role.
- Knowledge management is configured in your environment.
- Your knowledge article parameters are as follows:
  - Updated with the latest version
  - The state is set to Published

- The locale is set to English

Region availability and supported languages

Copilot AI features are available by default to only those customers with environments that have United States as their geography for data processing and storage. See: Region availability of analytics and insights.

For enabling the Copilot features outside the United States, see Copilot data movement across geographies.

To learn about supported languages for Copilot, see Language support for AI-based analytics and insights in Customer Service.

Enable public preview for geographies outside of United States

1. Enable cross geo support based on your location.
2. Go to Power Platform admin center and select **Environments**.
3. Select the environment in which you'd like to enable the copilot features, and then copy the value of the **Organization ID**.
4. Email a request to `d365_csaipreview@microsoft.com` with your **Organization ID** to enable the preview.

Opt in to continue with Copilot setup

Before you enable a Copilot feature, review the terms and conditions, and then provide your consent to use Copilot. To opt in, go to the **Copilot help pane** or **Summaries** pages in Customer Service admin center, and then select **Opt in** to continue with the setup.

Record feedback

In the **Summaries** and **Copilot help pane** configuration pages, you can select **Record transcripts of agent interaction with Copilot, agent actions, and agent feedback on AI suggestions** to record and understand how agents are interacting with Copilot and how Copilot is performing in a support organization. Agents can also share feedback about Copilot actions, which helps Copilot perform better. You can use the data to analyze knowledge sources, and also build usage reports.

Make Copilot available to agents

For agents to be able to use the copilot help pane and copilot summaries in Customer Service workspace, you need to enable the copilot features in agent experience profiles. For Customer Service Hub, when you enable the feature, it will be available to all the agents.

1. Go to Agent experience profiles in **Agent experience** > **Workspaces**.
2. Select the required agent experience profile.
3. In the **Productivity Pane**, select **Turn On** for **Copilot**. The **Copilot AI features** section appears.
4. In **Copilot AI features**, select the required features **Ask a question**, **Scan customer conversation and suggest a response**, **Write an email**, **Case summary**, **Live conversation summary**, you want to enable for that profile.

Assign roles and privileges

Out of the box, users with the Customer Service Representative role only can use the copilot features. Therefore, make sure that users with custom roles have the following privileges:

- prvCreatemsdyn_copilotinteraction
- prvAppendmsdyn_copilotinteraction
- prvCreatemsdyn_copilotinteractiondata
- prvReadmsdyn_copilotagentpreference
- prvCreatemsdyn_copilotagentpreference
- prvWritemsdyn_copilotagentpreference
- prvReadmsdyn_agentcopilotsetting
- prvReadmsdyn_copilotsummarizationsetting
- prvReadmsdyn_conversationinsight
- prvWritemsdyn_copilottranscriptdata
- prvAppendTomsdyn_copilottranscriptdata
- prvReadmsdyn_copilottranscript
- prvCreatemsdyn_copilottranscript
- prvWritemsdyn_copilottranscript
- prvAppendTomsdyn_copilottranscript
- prvReadmsdyn_copilottranscriptdata
- prvCreatemsdyn_copilottranscriptdata
- prvWritemsdyn_copilottranscriptdata
- prvAppendmsdyn_copilottranscriptdata
- prvIntelligenceUsage

More information: Security roles and privileges

Data sharing for copilot features

You can enable data sharing for Dynamics 365 copilot features in the Power Platform admin center. This allows Microsoft to capture and manually review customer data including, but not limited to, users' natural language inputs, outputs, and related telemetry to build, improve, and/or validate Microsoft's features, services, machine learning models, and related systems for Dynamics 365 and Power Platform Copilot AI features. We don't use customer data to train Azure OpenAI Service foundation models.

More information: Tenant settings and FAQ for optional data sharing for Copilot AI features in Dynamics 365 and Power Platform

Next steps

Display Copilot case summary on custom case forms
Use Copilot features
Responsible AI FAQ for copilot features

Copilot data movement across geographies (preview)

Article • 09/28/2023

[This article is prerelease documentation and is subject to change.]

> **ⓘ Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Copilot AI features use Azure OpenAI Service and are provided by default to only those customers with environments that have United States as their geography for data processing and storage. While the Azure OpenAI Service is available in multiple geographies including Australia, Canada, United States, France, Japan and UK, Copilot does not follow the same regional rollout schedule.

Meanwhile, customers with environments outside the United States can use Copilot AI features by opting in to share relevant data with the Azure OpenAI Service in United States or Switzerland.

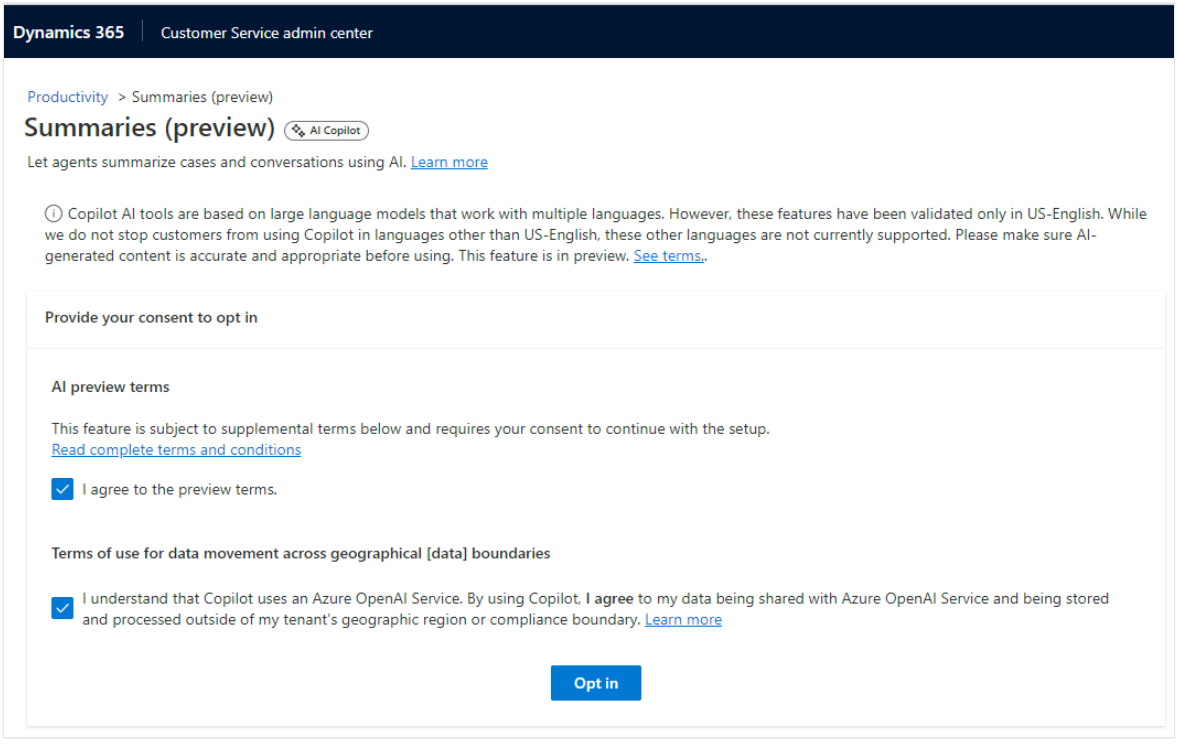
The information in the following table outlines the Azure OpenAI service that's used by the Copilot services based on the geography of their Dynamics 365 environment when they opt-in to share data.

Copilot availability	Dynamics 365 geography	Azure OpenAI geography
Yes	Asia Pacific	United States
Yes	Australia	United States
Yes	Canada	United States
No	China	N/A
Yes	Europe	Switzerland
Yes	France	Switzerland
Yes	Germany	Switzerland

Copilot availability	Dynamics 365 geography	Azure OpenAI geography
No	Government Community Cloud (GCC)	N/A
Yes	India	United States
Yes	Japan	United States
No	Korea	N/A
No	Norway	N/A
No	Singapore	N/A
No	South Africa	N/A
Yes	South America	United States
Yes	Switzerland	Switzerland
Yes	United Arab Emirates	United States
Yes	United Kingdom	Switzerland
Yes	United States	United States

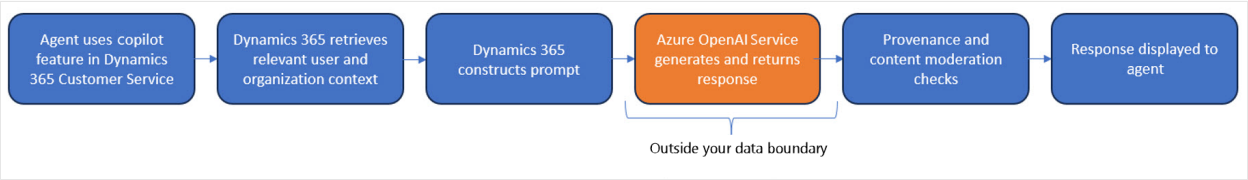
The copilot AI opt-in is in limited preview. Do the following steps to opt-in to data movement across geographies:

1. Send an email to `d365_csaipreview@microsoft.com` with the Organization ID of the Dynamics 365 instance where you want to use Copilot. In two business days, the copilot setup experience will be visible in your Dynamics 365 instance.



2. Opt-in and set up Copilot using Enable copilot features in Customer Service. The opt-in terms don't apply to organizations in the United States and therefore aren't visible to them.

When you use any copilot feature in an organization that's outside the United States or Switzerland geography, your data, including personal data, that's used in prompts or returned in responses might be transmitted outside the geographic locations that you've selected for your primary data residency.



To learn more about how Azure OpenAI protects your data, read Data, privacy, and security for Azure OpenAI Service.

Examples of customer data, along with personal data that's shared with Azure OpenAI, include relevant customer and agent chat messages, emails, case attributes, knowledge articles, agent name, email address, and customer name. Personal information is used to provide replies to a specific user.

See also

Responsible AI FAQ for Dynamics 365 Customer Service Region availability of analytics and insights
Configure copilot capabilities

Use Copilot to solve customer issues

Article • 09/28/2023

> **Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Copilot is an AI-powered tool that revolutionizes the agent experience in Dynamics 365 Customer Service. It provides real-time assistance to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks so you can focus on delivering high-quality service to your customers.

> **Important**
>
> The AI-generated content is a suggestion. It's your responsibility to review and edit the suggested content to make sure it's accurate and appropriate before sharing the responses.

License requirements

Requirement type	You must have
License	• Dynamics 365 Customer Service Enterprise for summarize cases, ask a question, draft emails, and copilot analytics • Customer Service add-in (Chat, Digital Messaging, or Voice) for draft a chat response and summarize conversations

Prerequisites

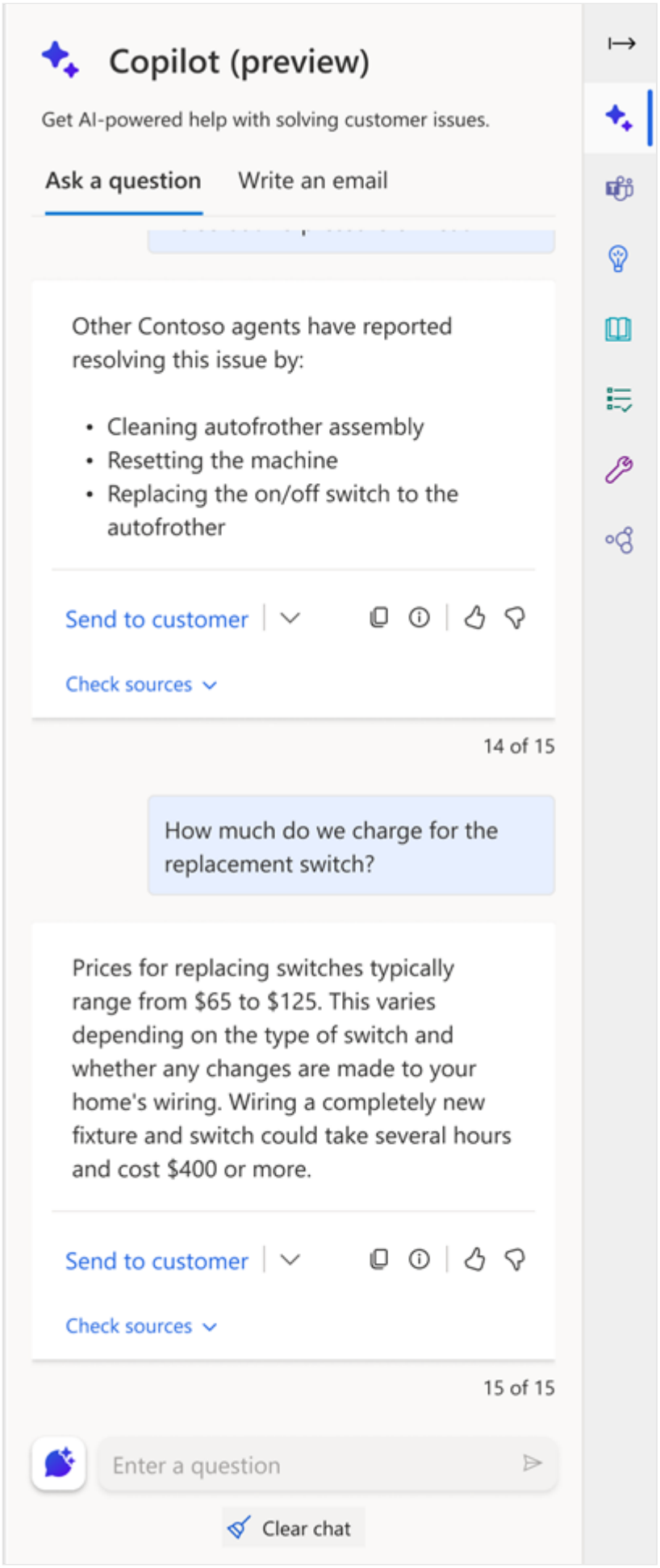
Make sure that your administrator has turned on the copilot features.

Ask a question

When you sign in to any of the Customer Service agent apps, Copilot opens in the right side panel with the **Ask a question** tab ready. Copilot acts as your partner, helping to answer questions without your having to search for the information.

Draft questions

You can ask free-form questions just as you'd ask your colleague or supervisor who might know the answers.



With Copilot, you can take the following actions:

- **Ask a direct question**: Copilot shows the most relevant answer from the knowledge sources your organization has made available.
- **Ask follow-up turn by turn questions**: If Copilot's response isn't immediately useful, you can ask follow-up questions and guide Copilot in a natural, conversational way.
- **Ask Copilot to attempt a better response**: Copilot can also rephrase responses based on more guidance such as, "Can you summarize your response?" or "Can you attempt a response providing details for each of the steps you mentioned?"

Use the responses

If you're satisfied with the response Copilot provides, you can use the whole thing or a part of it to answer the customer's question:

- Copy part of Copilot's reply into your chat or read from it during a voice conversation. Select the copy icon to copy the entire response to the clipboard.
- When you're in an active digital messaging conversation, select **Send to customer** to open an editing window where you can revise the response and send it to the customer. You can also change customer keywords to prompt Copilot to generate a more accurate response.
- Select **Check sources** to see the knowledge base or website links from which Copilot drew the response. You can use this supplemental information as a resource or share it with the customer.

Clear chat to start over

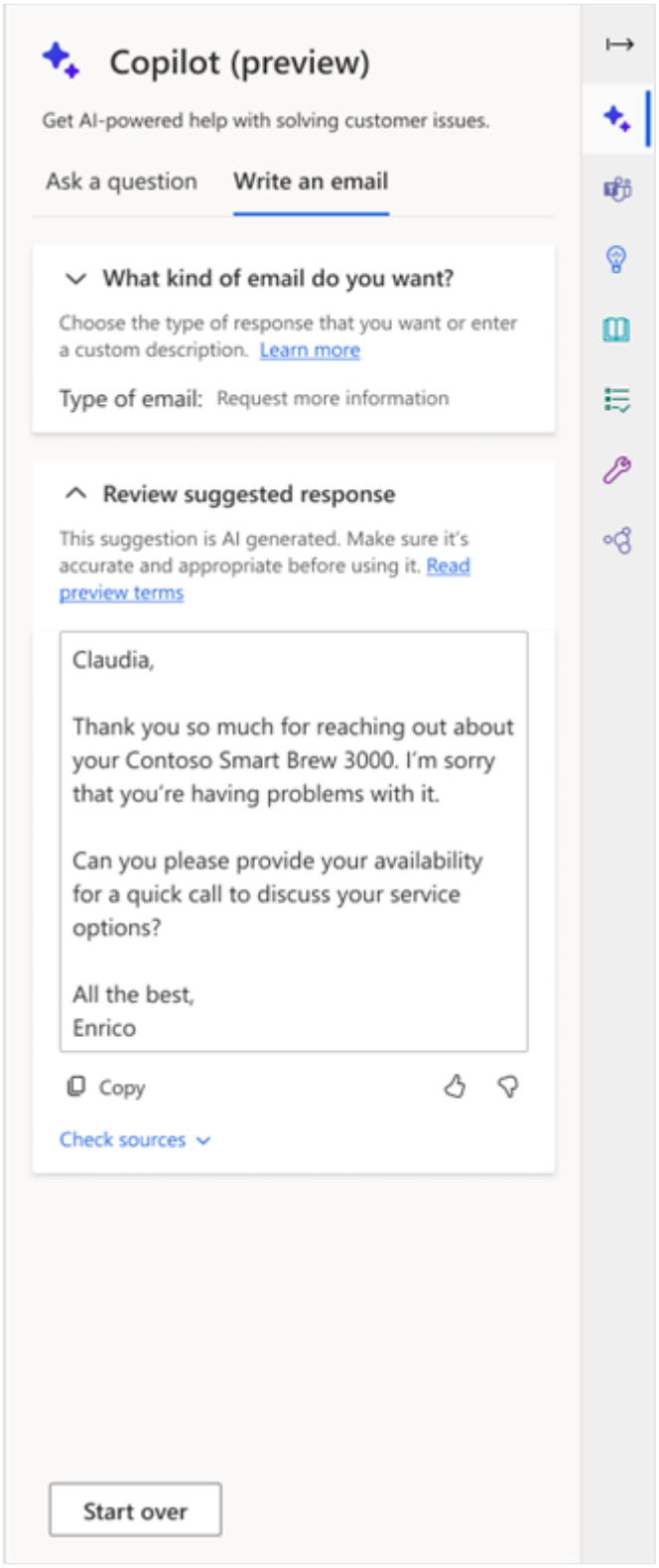
After a customer conversation has ended, or if you want Copilot to disregard the conversation so far, select **Clear chat** at the bottom of the Copilot pane.

Provide feedback

To rate the usefulness of Copilot's responses, select the thumbs-up or thumbs-down icon.

Draft emails

With Copilot, you can draft email replies to customers quickly and be more effective in solving customer issues.



Write an email with Copilot

When you start to draft an email, Copilot opens in the right side panel and presents five predefined prompts and one custom prompt:

- **Suggest a call**: Drafts a reply that suggests a call with the customer today or tomorrow.
- **Request more information**: Drafts a reply that requests more details from the customer to help resolve the problem.

- **Empathize with feedback**: Drafts a reply that provides an empathetic response to a customer who expresses a complaint.
- **Provide product/service details**: Drafts a reply that offers details or answers customer questions about a particular product or service.
- **Resolve the customer's problem**: Drafts a reply that provides a resolution—and resolution steps, if applicable—to the customer's problem.
- **Custom**: Allows you to provide your own prompt for the reply.

Review and copy suggested replies

When you select one of the predefined prompts, Copilot generates a suggested reply. *Always review the response.* Make any necessary changes, and then select **Copy to email** to copy the entire response to your draft. Or, select part of the response and use the right-click menu to copy and paste the selection.

Use the custom prompt

Use the custom prompt to include talking points, provide your objectives for the email, and determine its length and tone. Then select the **Create response** arrow to generate the response. *Always review the response* before sharing it with your customer. You can revise the custom prompt, if needed, above the reply and select **Refresh** to update the response.

How Copilot uses knowledge base and web sources

By default, Copilot uses internal knowledge base sources for generating responses. If your administrator has set up trusted domains, Copilot searches the internal knowledge base and up to five trusted domains to produce the result.

Start over

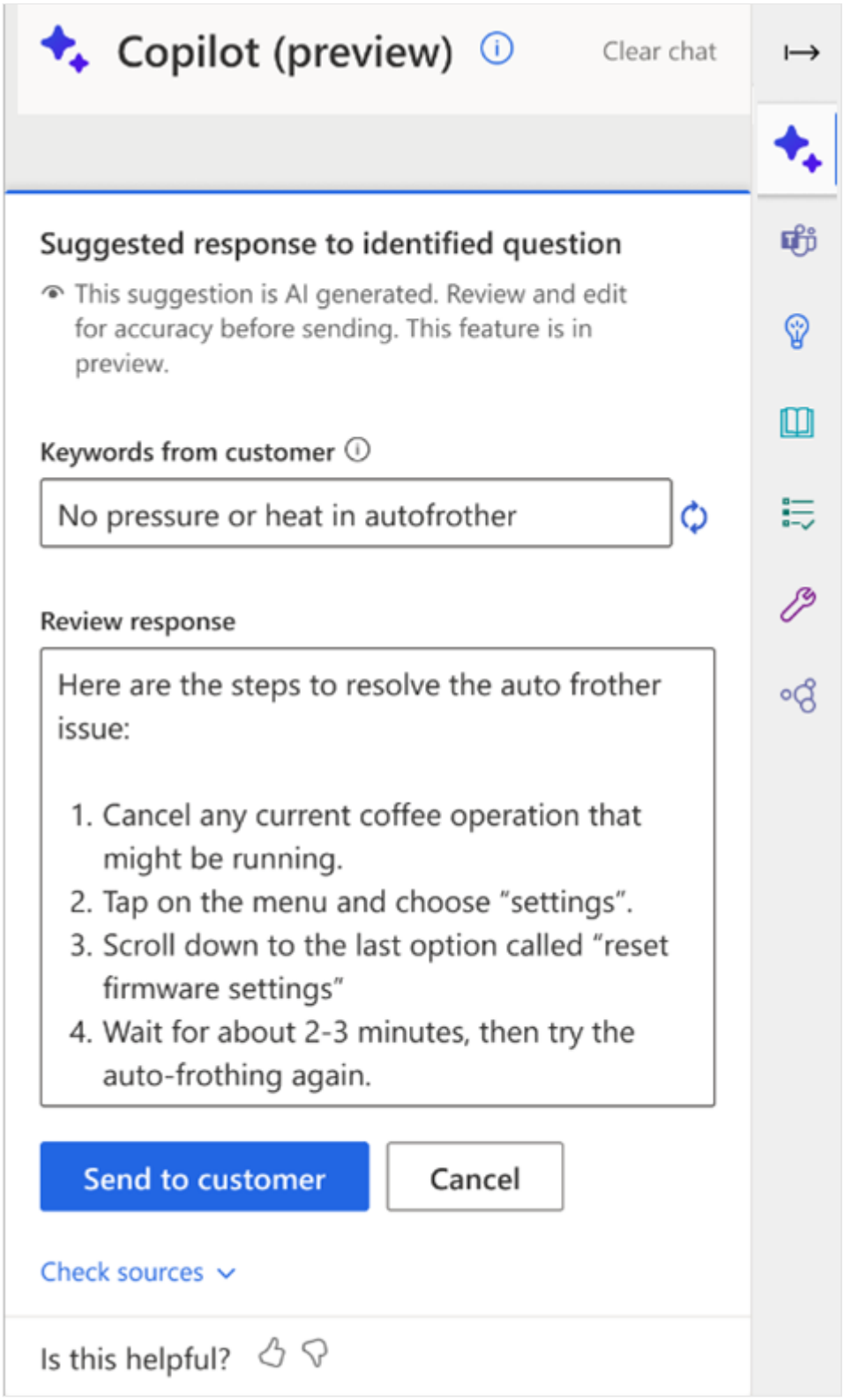
To return to the choice of six prompts, select **Start over** at the bottom of the Copilot pane.

Draft a chat response (Preview)

> **Important**
>
> - This is a preview feature.

- Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Use Copilot to draft chat responses when you're in a conversation with a customer.



Generate a chat response

Select the one-click response generation button at the lower-right corner of the Conversation control panel and at the lower-left corner of the Copilot pane. Copilot analyzes the context of the conversation and the latest customer question or message, and drafts a response to send directly to the customer. You don't need to manually type the question.

> ⓘ **Note**
>
> The one-click response generation feature is available in North America, Europe, and the United Kingdom only.

Apply filters

You can setup filters for Copilot to generate responses based on a specific set of topics. Filters provide immediate context and reduce the chance of getting irrelevant responses.

For example, your organization has several departments and you work only on credit card related queries. If you apply the credit card filter, Copilot retrieves only the relevant credit card content from the knowledge source and which is then used to generate responses.

To apply a filter, perform the following steps:

- Select **Filters** on the Copilot (preview) pane. The **Select filters** menu appears.
- Select the required options. You can also search for a filter option.
- Select **Apply**.

Once you set a filter, the following actions are applicable:

- A message indicating the filters are applied when Copilot generates new responses appears on the Copilot (preview) pane. This message also appears whenever you modify the filter configuration.
- A visual indicator with the number of filter options selected is displayed next to **Filters**..
- The filters set apply to the following Copilot features: ask a question, draft a chat, and email.
- The filter is saved. You don't have to set the filter each time you log in.

See also

Manage copilot features in Customer Service

Responsible AI FAQ for copilot features

Use Copilot to summarize cases and conversations

Article • 10/20/2023

You can use Copilot to summarize cases and conversations if your administrator has turned on this feature.

> **Note**
>
> Copilot conversation and case summaries are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

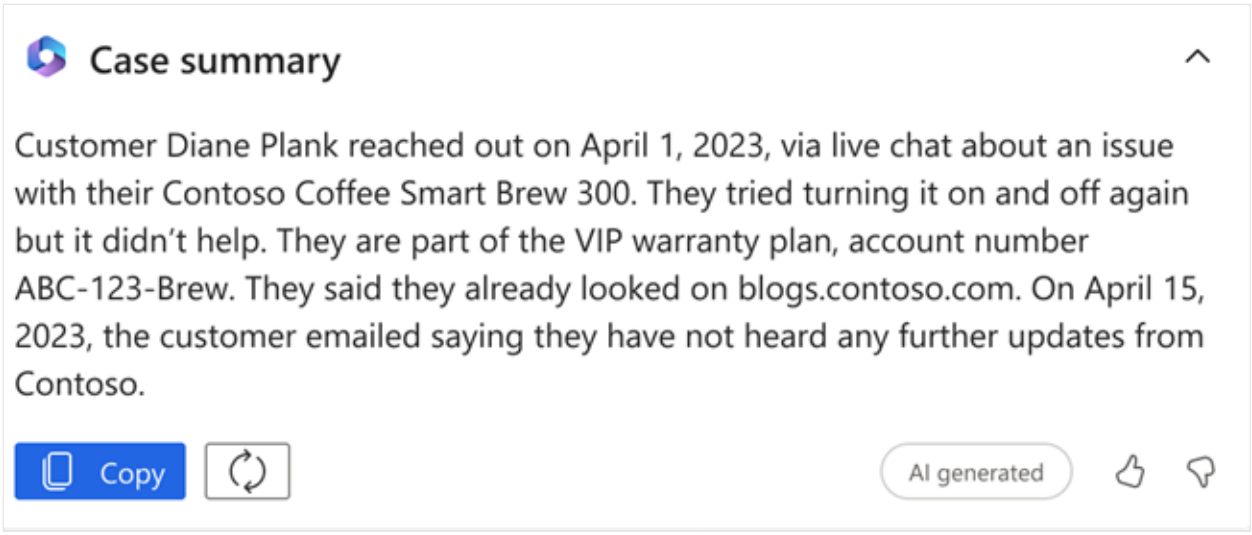
> **Note**
>
> Copilot conversation and case summaries are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

Summarize cases

Copilot case summaries help you to quickly understand the context of a case and resolve customer issues more efficiently. The case summary includes key information such as the case title, customer, subject, product, priority, case type, and description.

Get a case summary

The case summary appears as a card on the case form. When you open a case, the case summary card is collapsed by default so that that your screen isn't cluttered with information. Select the card to expand the summary.



You can copy the summary, refresh it, and provide feedback.

> **Note**
>
> You can also generate a case summary for cases that are resolved or canceled.

Summarize conversations

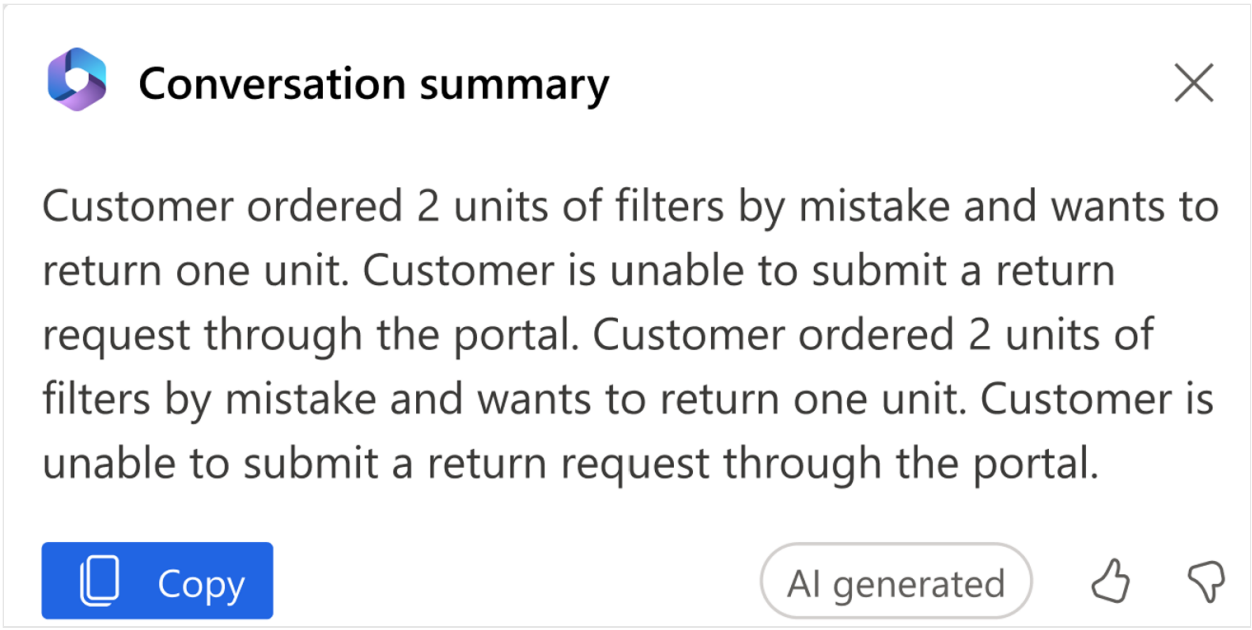
Copilot conversation summaries provide context and relay the steps that you've already taken to solve the issue. You can summarize chat and transcribed voice conversations.

> **Note**
>
> If your administrator has turned on auto-summarization for ongoing conversations, you get an AI-generated summary of the conversation along with the Copilot-generated conversation summary. The two summaries may be slightly different. **Learn more about auto-summarized conversations**.

Get a conversation summary

Depending on the triggers your administrator has set up, the Copilot conversation summary is generated like this:

- Automatically when you request a consultation with another agent, transfer the conversation, or end the conversation.
- When you select **Summarize conversation** in an ongoing conversation.



You can also take the following actions:

- Copy the summary.
- Select **Create case** to create a case and populate the description with the summary, if your administrator has turned on this feature.
- Share feedback about the summary.
- Close the summary card.

Next steps

Use Copilot to solve customer issues

Use Copilot to summarize cases and conversations

Article • 10/20/2023

You can use Copilot to summarize cases and conversations if your administrator has turned on this feature.

> **Note**
>
> Copilot conversation and case summaries are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

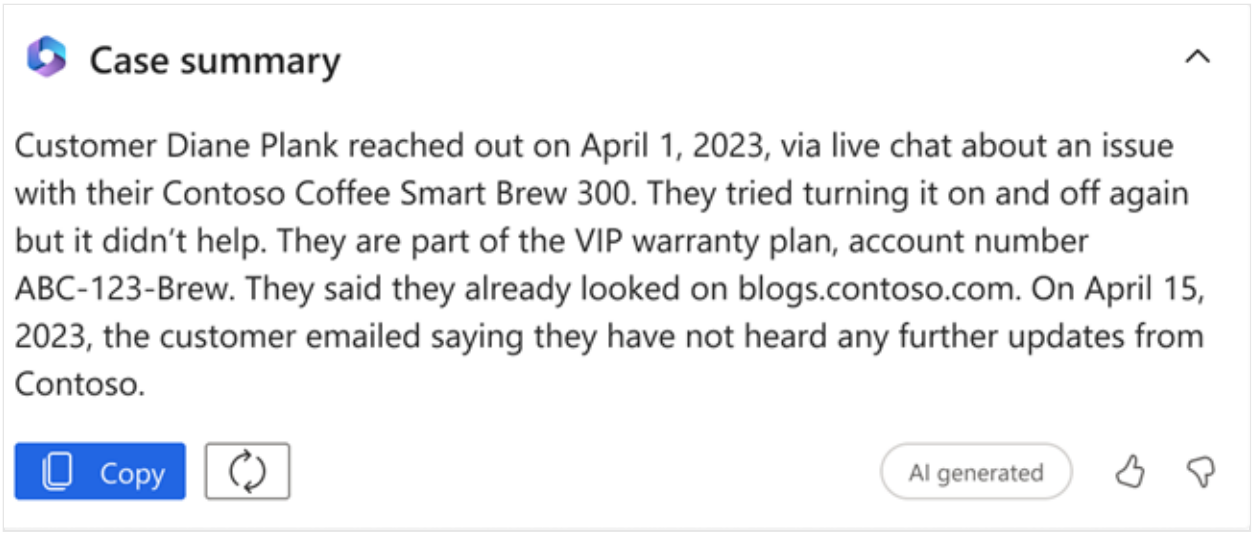
> **Note**
>
> Copilot conversation and case summaries are generally available in the North America region only. This feature is in preview in the rest of the supported regions.

Summarize cases

Copilot case summaries help you to quickly understand the context of a case and resolve customer issues more efficiently. The case summary includes key information such as the case title, customer, subject, product, priority, case type, and description.

Get a case summary

The case summary appears as a card on the case form. When you open a case, the case summary card is collapsed by default so that that your screen isn't cluttered with information. Select the card to expand the summary.



You can copy the summary, refresh it, and provide feedback.

> **Note**
>
> You can also generate a case summary for cases that are resolved or canceled.

Summarize conversations

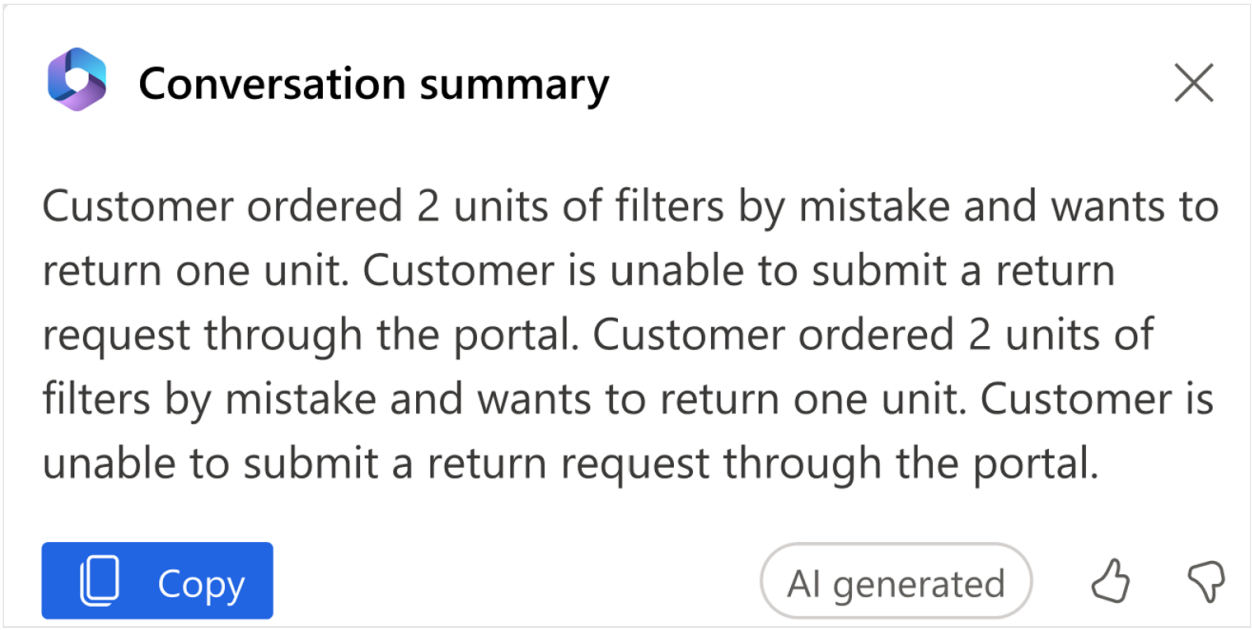
Copilot conversation summaries provide context and relay the steps that you've already taken to solve the issue. You can summarize chat and transcribed voice conversations.

> **Note**
>
> If your administrator has turned on auto-summarization for ongoing conversations, you get an AI-generated summary of the conversation along with the Copilot-generated conversation summary. The two summaries may be slightly different. **Learn more about auto-summarized conversations**.

Get a conversation summary

Depending on the triggers your administrator has set up, the Copilot conversation summary is generated like this:

- Automatically when you request a consultation with another agent, transfer the conversation, or end the conversation.
- When you select **Summarize conversation** in an ongoing conversation.



You can also take the following actions:

- Copy the summary.
- Select **Create case** to create a case and populate the description with the summary, if your administrator has turned on this feature.
- Share feedback about the summary.
- Close the summary card.

Next steps

Use Copilot to solve customer issues

Use Copilot to solve customer issues

Article • 09/28/2023

> **Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Copilot is an AI-powered tool that revolutionizes the agent experience in Dynamics 365 Customer Service. It provides real-time assistance to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks so you can focus on delivering high-quality service to your customers.

> **Important**
>
> The AI-generated content is a suggestion. It's your responsibility to review and edit the suggested content to make sure it's accurate and appropriate before sharing the responses.

License requirements

Requirement type	You must have
License	• Dynamics 365 Customer Service Enterprise for summarize cases, ask a question, draft emails, and copilot analytics • Customer Service add-in (Chat, Digital Messaging, or Voice) for draft a chat response and summarize conversations

Prerequisites

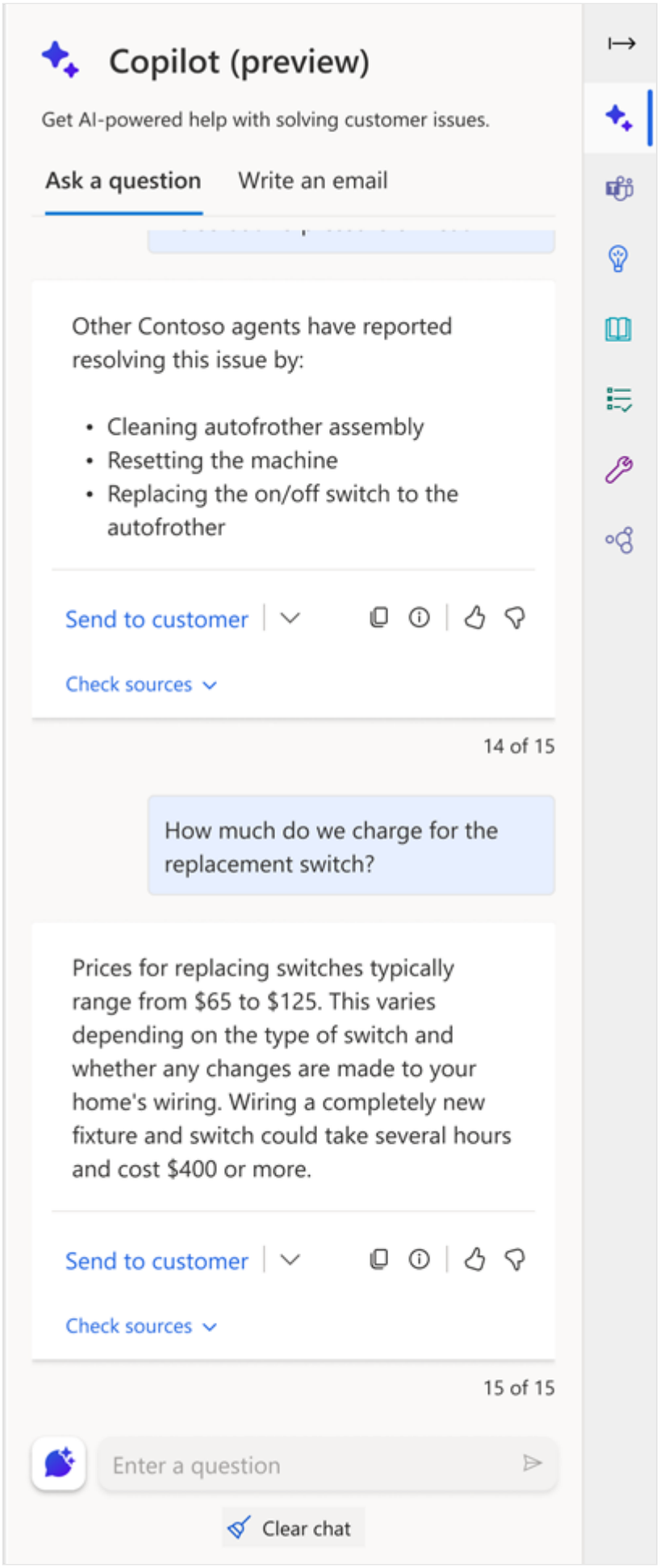
Make sure that your administrator has turned on the copilot features.

Ask a question

When you sign in to any of the Customer Service agent apps, Copilot opens in the right side panel with the **Ask a question** tab ready. Copilot acts as your partner, helping to answer questions without your having to search for the information.

Draft questions

You can ask free-form questions just as you'd ask your colleague or supervisor who might know the answers.



With Copilot, you can take the following actions:

- **Ask a direct question**: Copilot shows the most relevant answer from the knowledge sources your organization has made available.
- **Ask follow-up turn by turn questions**: If Copilot's response isn't immediately useful, you can ask follow-up questions and guide Copilot in a natural, conversational way.
- **Ask Copilot to attempt a better response**: Copilot can also rephrase responses based on more guidance such as, "Can you summarize your response?" or "Can you attempt a response providing details for each of the steps you mentioned?"

Use the responses

If you're satisfied with the response Copilot provides, you can use the whole thing or a part of it to answer the customer's question:

- Copy part of Copilot's reply into your chat or read from it during a voice conversation. Select the copy icon to copy the entire response to the clipboard.
- When you're in an active digital messaging conversation, select **Send to customer** to open an editing window where you can revise the response and send it to the customer. You can also change customer keywords to prompt Copilot to generate a more accurate response.
- Select **Check sources** to see the knowledge base or website links from which Copilot drew the response. You can use this supplemental information as a resource or share it with the customer.

Clear chat to start over

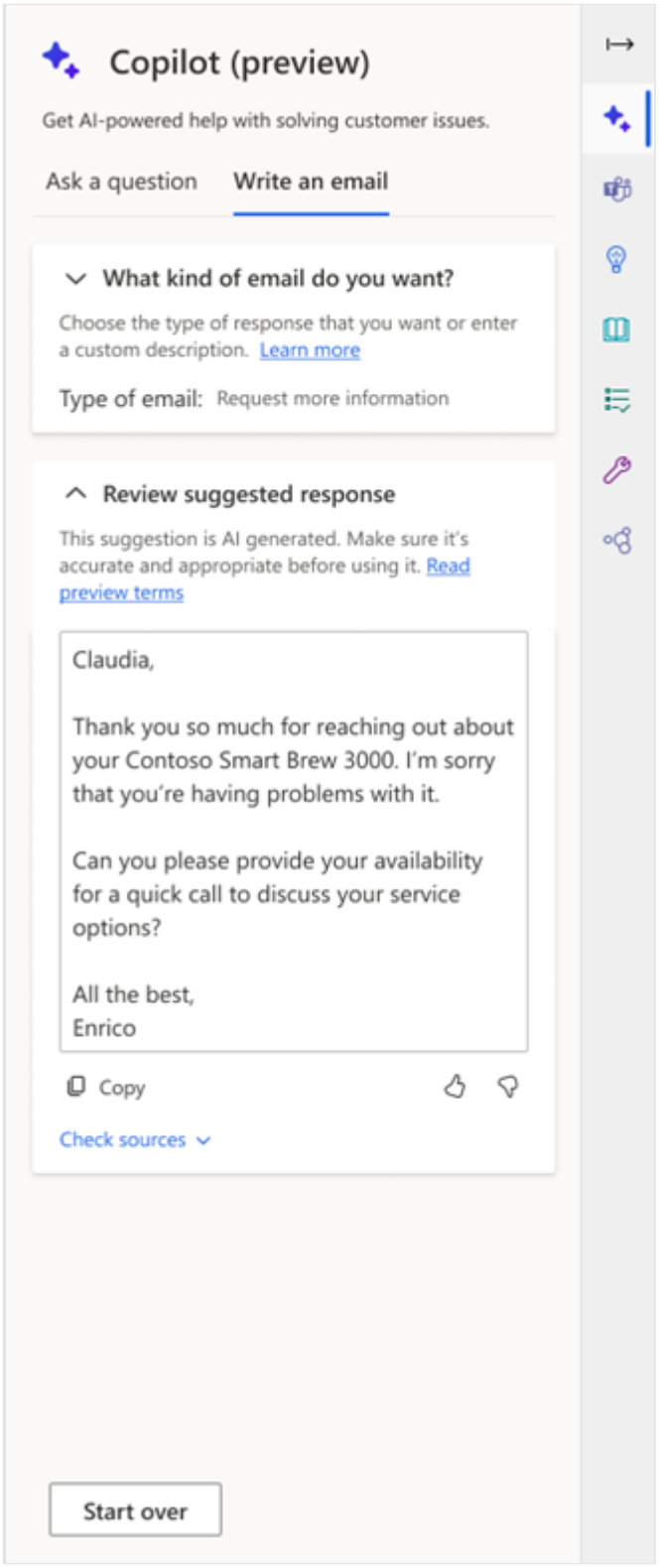
After a customer conversation has ended, or if you want Copilot to disregard the conversation so far, select **Clear chat** at the bottom of the Copilot pane.

Provide feedback

To rate the usefulness of Copilot's responses, select the thumbs-up or thumbs-down icon.

Draft emails

With Copilot, you can draft email replies to customers quickly and be more effective in solving customer issues.



Write an email with Copilot

When you start to draft an email, Copilot opens in the right side panel and presents five predefined prompts and one custom prompt:

- **Suggest a call**: Drafts a reply that suggests a call with the customer today or tomorrow.
- **Request more information**: Drafts a reply that requests more details from the customer to help resolve the problem.

- **Empathize with feedback**: Drafts a reply that provides an empathetic response to a customer who expresses a complaint.
- **Provide product/service details**: Drafts a reply that offers details or answers customer questions about a particular product or service.
- **Resolve the customer's problem**: Drafts a reply that provides a resolution—and resolution steps, if applicable—to the customer's problem.
- **Custom**: Allows you to provide your own prompt for the reply.

Review and copy suggested replies

When you select one of the predefined prompts, Copilot generates a suggested reply. *Always review the response.* Make any necessary changes, and then select **Copy to email** to copy the entire response to your draft. Or, select part of the response and use the right-click menu to copy and paste the selection.

Use the custom prompt

Use the custom prompt to include talking points, provide your objectives for the email, and determine its length and tone. Then select the **Create response** arrow to generate the response. *Always review the response* before sharing it with your customer. You can revise the custom prompt, if needed, above the reply and select **Refresh** to update the response.

How Copilot uses knowledge base and web sources

By default, Copilot uses internal knowledge base sources for generating responses. If your administrator has set up trusted domains, Copilot searches the internal knowledge base and up to five trusted domains to produce the result.

Start over

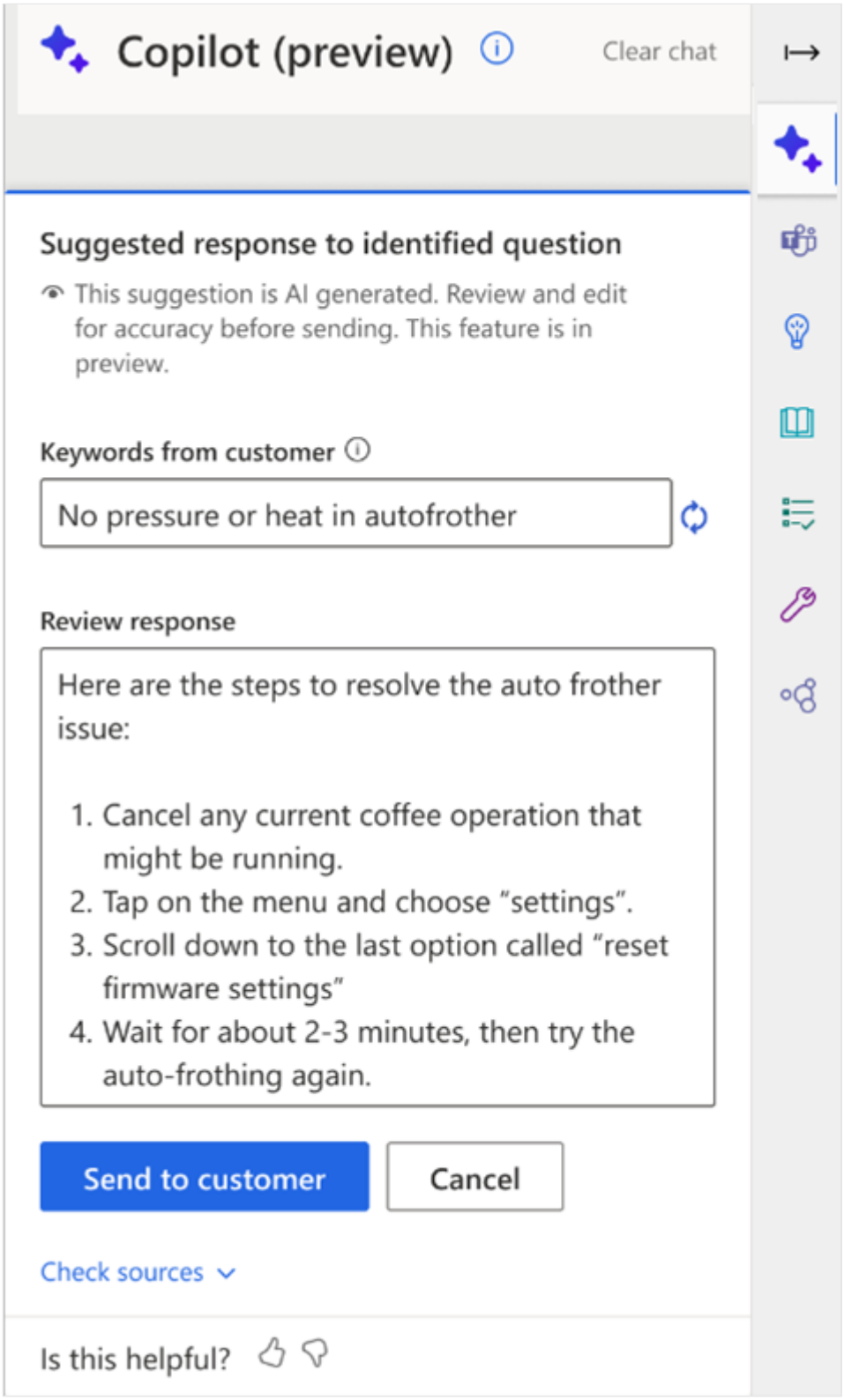
To return to the choice of six prompts, select **Start over** at the bottom of the Copilot pane.

Draft a chat response (Preview)

> **Important**
>
> - This is a preview feature.

- Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Use Copilot to draft chat responses when you're in a conversation with a customer.



Generate a chat response

Select the one-click response generation button at the lower-right corner of the Conversation control panel and at the lower-left corner of the Copilot pane. Copilot analyzes the context of the conversation and the latest customer question or message, and drafts a response to send directly to the customer. You don't need to manually type the question.

> ⓘ **Note**
>
> The one-click response generation feature is available in North America, Europe, and the United Kingdom only.

Apply filters

You can setup filters for Copilot to generate responses based on a specific set of topics. Filters provide immediate context and reduce the chance of getting irrelevant responses.

For example, your organization has several departments and you work only on credit card related queries. If you apply the credit card filter, Copilot retrieves only the relevant credit card content from the knowledge source and which is then used to generate responses.

To apply a filter, perform the following steps:

- Select **Filters** on the Copilot (preview) pane. The **Select filters** menu appears.
- Select the required options. You can also search for a filter option.
- Select **Apply**.

Once you set a filter, the following actions are applicable:

- A message indicating the filters are applied when Copilot generates new responses appears on the Copilot (preview) pane. This message also appears whenever you modify the filter configuration.
- A visual indicator with the number of filter options selected is displayed next to **Filters**..
- The filters set apply to the following Copilot features: ask a question, draft a chat, and email.
- The filter is saved. You don't have to set the filter each time you log in.

See also

Manage copilot features in Customer Service

Responsible AI FAQ for copilot features

Use Copilot to solve customer issues

Article • 09/28/2023

> **Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Copilot is an AI-powered tool that revolutionizes the agent experience in Dynamics 365 Customer Service. It provides real-time assistance to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks so you can focus on delivering high-quality service to your customers.

> **Important**
>
> The AI-generated content is a suggestion. It's your responsibility to review and edit the suggested content to make sure it's accurate and appropriate before sharing the responses.

License requirements

Requirement type	You must have
License	• Dynamics 365 Customer Service Enterprise for summarize cases, ask a question, draft emails, and copilot analytics • Customer Service add-in (Chat, Digital Messaging, or Voice) for draft a chat response and summarize conversations

Prerequisites

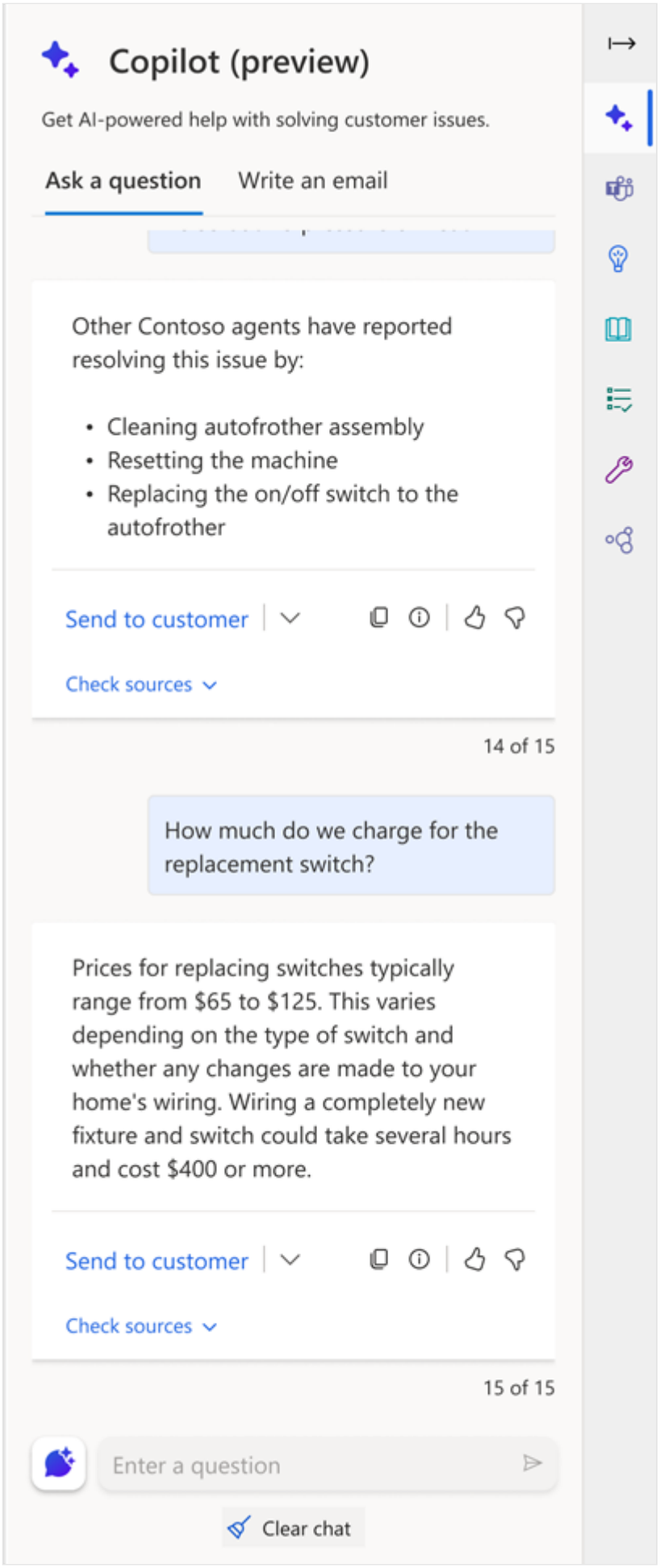
Make sure that your administrator has turned on the copilot features.

Ask a question

When you sign in to any of the Customer Service agent apps, Copilot opens in the right side panel with the **Ask a question** tab ready. Copilot acts as your partner, helping to answer questions without your having to search for the information.

Draft questions

You can ask free-form questions just as you'd ask your colleague or supervisor who might know the answers.



With Copilot, you can take the following actions:

- **Ask a direct question**: Copilot shows the most relevant answer from the knowledge sources your organization has made available.
- **Ask follow-up turn by turn questions**: If Copilot's response isn't immediately useful, you can ask follow-up questions and guide Copilot in a natural, conversational way.
- **Ask Copilot to attempt a better response**: Copilot can also rephrase responses based on more guidance such as, "Can you summarize your response?" or "Can you attempt a response providing details for each of the steps you mentioned?"

Use the responses

If you're satisfied with the response Copilot provides, you can use the whole thing or a part of it to answer the customer's question:

- Copy part of Copilot's reply into your chat or read from it during a voice conversation. Select the copy icon to copy the entire response to the clipboard.
- When you're in an active digital messaging conversation, select **Send to customer** to open an editing window where you can revise the response and send it to the customer. You can also change customer keywords to prompt Copilot to generate a more accurate response.
- Select **Check sources** to see the knowledge base or website links from which Copilot drew the response. You can use this supplemental information as a resource or share it with the customer.

Clear chat to start over

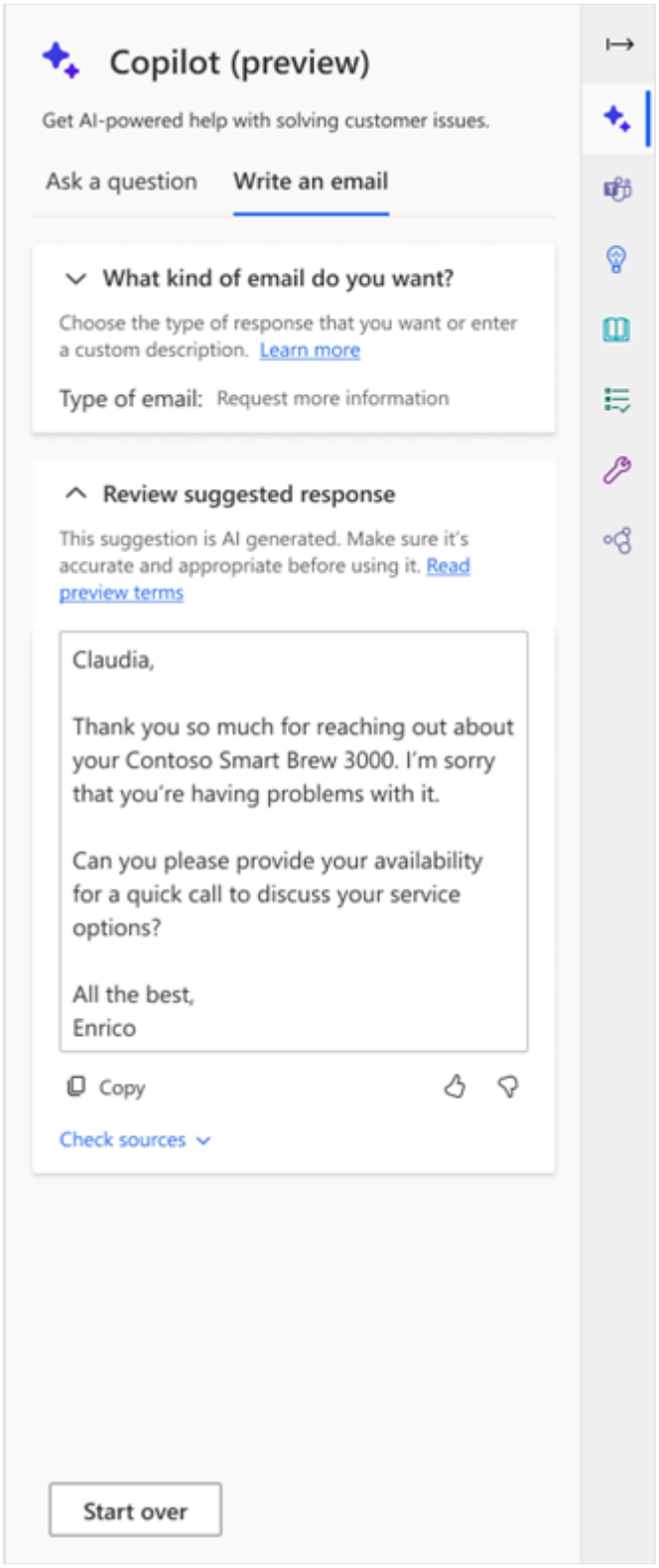
After a customer conversation has ended, or if you want Copilot to disregard the conversation so far, select **Clear chat** at the bottom of the Copilot pane.

Provide feedback

To rate the usefulness of Copilot's responses, select the thumbs-up or thumbs-down icon.

Draft emails

With Copilot, you can draft email replies to customers quickly and be more effective in solving customer issues.



Write an email with Copilot

When you start to draft an email, Copilot opens in the right side panel and presents five predefined prompts and one custom prompt:

- **Suggest a call**: Drafts a reply that suggests a call with the customer today or tomorrow.
- **Request more information**: Drafts a reply that requests more details from the customer to help resolve the problem.

- **Empathize with feedback**: Drafts a reply that provides an empathetic response to a customer who expresses a complaint.
- **Provide product/service details**: Drafts a reply that offers details or answers customer questions about a particular product or service.
- **Resolve the customer's problem**: Drafts a reply that provides a resolution—and resolution steps, if applicable—to the customer's problem.
- **Custom**: Allows you to provide your own prompt for the reply.

Review and copy suggested replies

When you select one of the predefined prompts, Copilot generates a suggested reply. *Always review the response.* Make any necessary changes, and then select **Copy to email** to copy the entire response to your draft. Or, select part of the response and use the right-click menu to copy and paste the selection.

Use the custom prompt

Use the custom prompt to include talking points, provide your objectives for the email, and determine its length and tone. Then select the **Create response** arrow to generate the response. *Always review the response* before sharing it with your customer. You can revise the custom prompt, if needed, above the reply and select **Refresh** to update the response.

How Copilot uses knowledge base and web sources

By default, Copilot uses internal knowledge base sources for generating responses. If your administrator has set up trusted domains, Copilot searches the internal knowledge base and up to five trusted domains to produce the result.

Start over

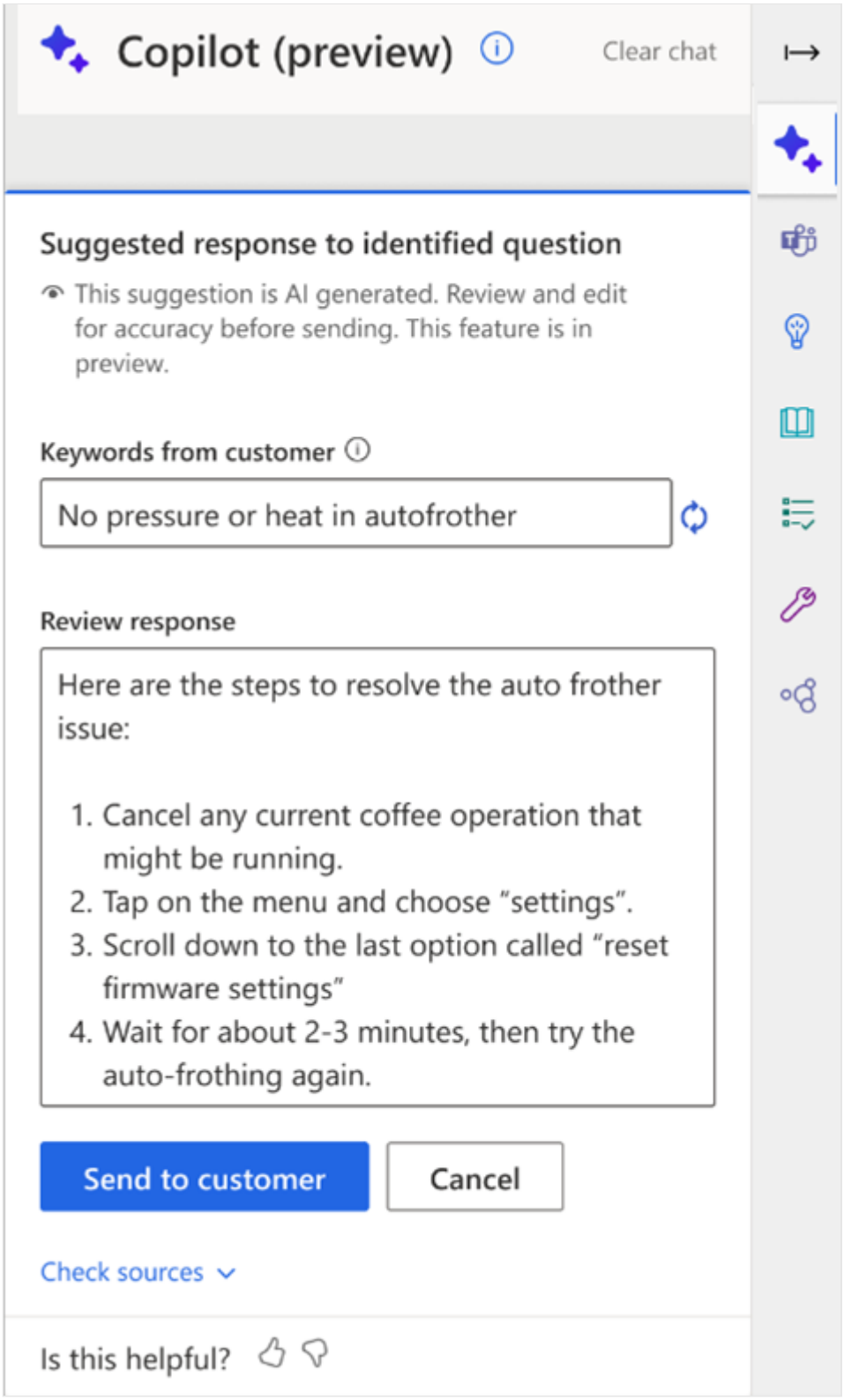
To return to the choice of six prompts, select **Start over** at the bottom of the Copilot pane.

Draft a chat response (Preview)

> **Important**
>
> - This is a preview feature.

- Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Use Copilot to draft chat responses when you're in a conversation with a customer.



Generate a chat response

Select the one-click response generation button at the lower-right corner of the Conversation control panel and at the lower-left corner of the Copilot pane. Copilot analyzes the context of the conversation and the latest customer question or message, and drafts a response to send directly to the customer. You don't need to manually type the question.

> ⓘ **Note**
>
> The one-click response generation feature is available in North America, Europe, and the United Kingdom only.

Apply filters

You can setup filters for Copilot to generate responses based on a specific set of topics. Filters provide immediate context and reduce the chance of getting irrelevant responses.

For example, your organization has several departments and you work only on credit card related queries. If you apply the credit card filter, Copilot retrieves only the relevant credit card content from the knowledge source and which is then used to generate responses.

To apply a filter, perform the following steps:

- Select **Filters** on the Copilot (preview) pane. The **Select filters** menu appears.
- Select the required options. You can also search for a filter option.
- Select **Apply**.

Once you set a filter, the following actions are applicable:

- A message indicating the filters are applied when Copilot generates new responses appears on the Copilot (preview) pane. This message also appears whenever you modify the filter configuration.
- A visual indicator with the number of filter options selected is displayed next to **Filters**..
- The filters set apply to the following Copilot features: ask a question, draft a chat, and email.
- The filter is saved. You don't have to set the filter each time you log in.

See also

Manage copilot features in Customer Service

Responsible AI FAQ for copilot features

Use Copilot to solve customer issues

Article • 09/28/2023

> **Important**
>
> - This is a preview feature.
> - Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Copilot is an AI-powered tool that revolutionizes the agent experience in Dynamics 365 Customer Service. It provides real-time assistance to resolve issues faster, handle cases more efficiently, and automate time-consuming tasks so you can focus on delivering high-quality service to your customers.

> **Important**
>
> The AI-generated content is a suggestion. It's your responsibility to review and edit the suggested content to make sure it's accurate and appropriate before sharing the responses.

License requirements

Requirement type	You must have
License	• Dynamics 365 Customer Service Enterprise for summarize cases, ask a question, draft emails, and copilot analytics • Customer Service add-in (Chat, Digital Messaging, or Voice) for draft a chat response and summarize conversations

Prerequisites

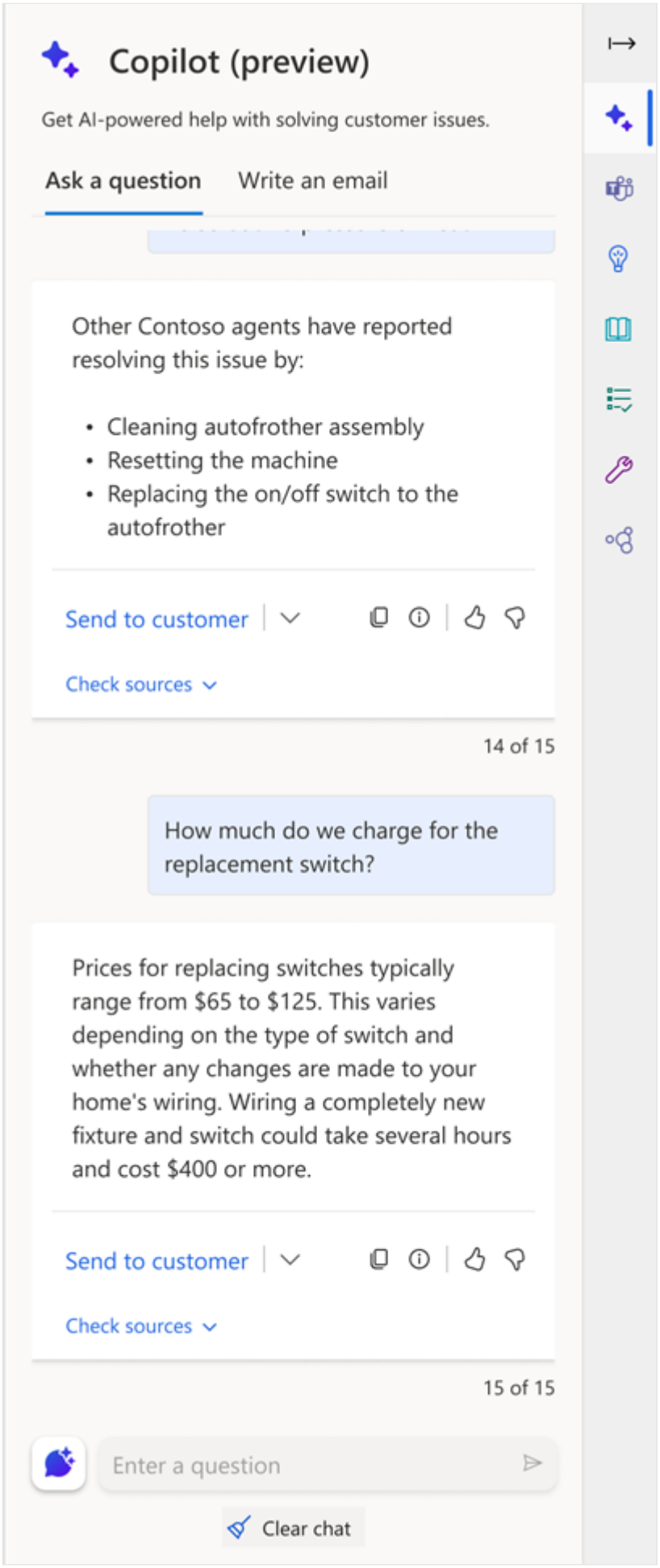
Make sure that your administrator has turned on the copilot features.

Ask a question

When you sign in to any of the Customer Service agent apps, Copilot opens in the right side panel with the **Ask a question** tab ready. Copilot acts as your partner, helping to answer questions without your having to search for the information.

Draft questions

You can ask free-form questions just as you'd ask your colleague or supervisor who might know the answers.



With Copilot, you can take the following actions:

- **Ask a direct question**: Copilot shows the most relevant answer from the knowledge sources your organization has made available.
- **Ask follow-up turn by turn questions**: If Copilot's response isn't immediately useful, you can ask follow-up questions and guide Copilot in a natural, conversational way.
- **Ask Copilot to attempt a better response**: Copilot can also rephrase responses based on more guidance such as, "Can you summarize your response?" or "Can you attempt a response providing details for each of the steps you mentioned?"

Use the responses

If you're satisfied with the response Copilot provides, you can use the whole thing or a part of it to answer the customer's question:

- Copy part of Copilot's reply into your chat or read from it during a voice conversation. Select the copy icon to copy the entire response to the clipboard.
- When you're in an active digital messaging conversation, select **Send to customer** to open an editing window where you can revise the response and send it to the customer. You can also change customer keywords to prompt Copilot to generate a more accurate response.
- Select **Check sources** to see the knowledge base or website links from which Copilot drew the response. You can use this supplemental information as a resource or share it with the customer.

Clear chat to start over

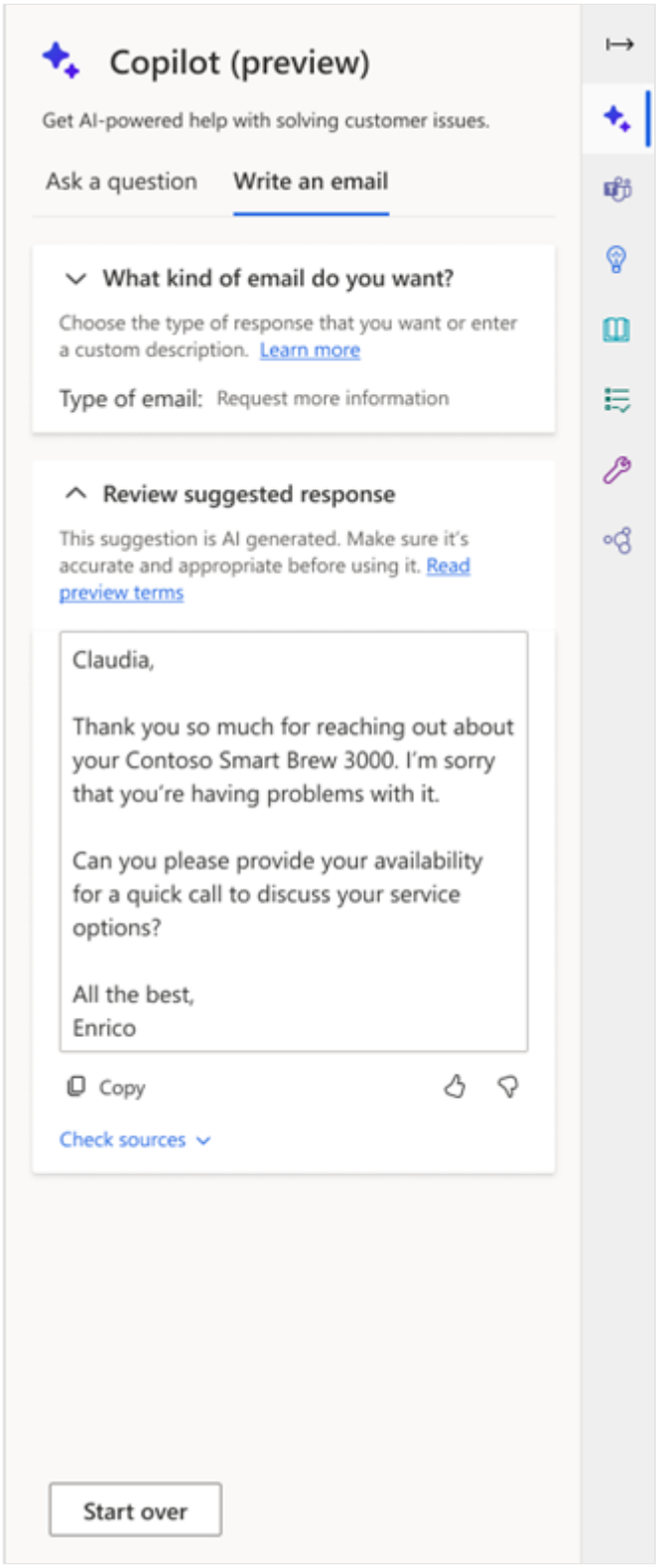
After a customer conversation has ended, or if you want Copilot to disregard the conversation so far, select **Clear chat** at the bottom of the Copilot pane.

Provide feedback

To rate the usefulness of Copilot's responses, select the thumbs-up or thumbs-down icon.

Draft emails

With Copilot, you can draft email replies to customers quickly and be more effective in solving customer issues.



Write an email with Copilot

When you start to draft an email, Copilot opens in the right side panel and presents five predefined prompts and one custom prompt:

- **Suggest a call**: Drafts a reply that suggests a call with the customer today or tomorrow.
- **Request more information**: Drafts a reply that requests more details from the customer to help resolve the problem.

- **Empathize with feedback**: Drafts a reply that provides an empathetic response to a customer who expresses a complaint.
- **Provide product/service details**: Drafts a reply that offers details or answers customer questions about a particular product or service.
- **Resolve the customer's problem**: Drafts a reply that provides a resolution—and resolution steps, if applicable—to the customer's problem.
- **Custom**: Allows you to provide your own prompt for the reply.

Review and copy suggested replies

When you select one of the predefined prompts, Copilot generates a suggested reply. *Always review the response.* Make any necessary changes, and then select **Copy to email** to copy the entire response to your draft. Or, select part of the response and use the right-click menu to copy and paste the selection.

Use the custom prompt

Use the custom prompt to include talking points, provide your objectives for the email, and determine its length and tone. Then select the **Create response** arrow to generate the response. *Always review the response* before sharing it with your customer. You can revise the custom prompt, if needed, above the reply and select **Refresh** to update the response.

How Copilot uses knowledge base and web sources

By default, Copilot uses internal knowledge base sources for generating responses. If your administrator has set up trusted domains, Copilot searches the internal knowledge base and up to five trusted domains to produce the result.

Start over

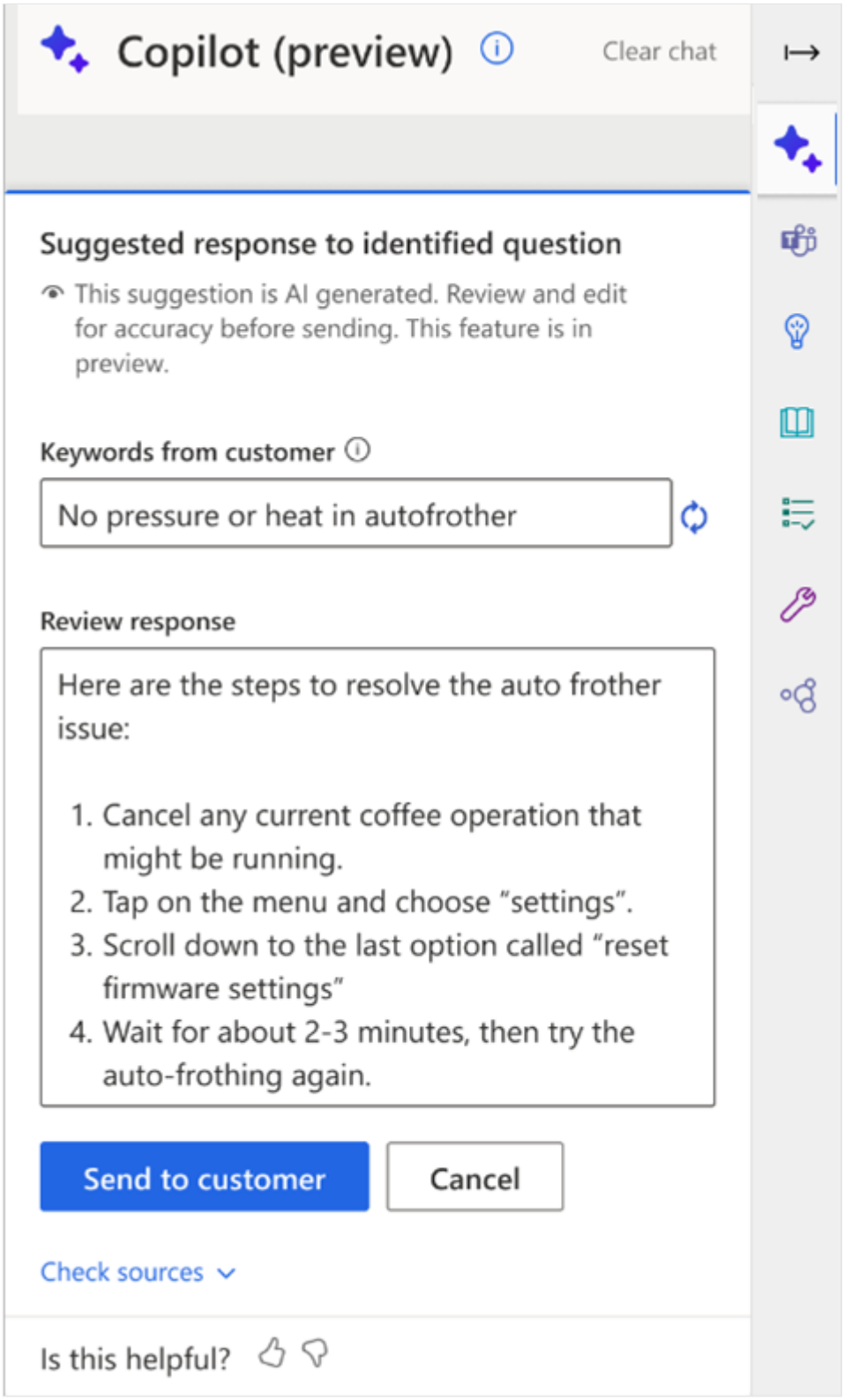
To return to the choice of six prompts, select **Start over** at the bottom of the Copilot pane.

Draft a chat response (Preview)

> **Important**
>
> - This is a preview feature.

- Preview features aren't meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Use Copilot to draft chat responses when you're in a conversation with a customer.



Generate a chat response

Select the one-click response generation button at the lower-right corner of the Conversation control panel and at the lower-left corner of the Copilot pane. Copilot analyzes the context of the conversation and the latest customer question or message, and drafts a response to send directly to the customer. You don't need to manually type the question.

> ⓘ **Note**
>
> The one-click response generation feature is available in North America, Europe, and the United Kingdom only.

Apply filters

You can setup filters for Copilot to generate responses based on a specific set of topics. Filters provide immediate context and reduce the chance of getting irrelevant responses.

For example, your organization has several departments and you work only on credit card related queries. If you apply the credit card filter, Copilot retrieves only the relevant credit card content from the knowledge source and which is then used to generate responses.

To apply a filter, perform the following steps:

- Select **Filters** on the Copilot (preview) pane. The **Select filters** menu appears.
- Select the required options. You can also search for a filter option.
- Select **Apply**.

Once you set a filter, the following actions are applicable:

- A message indicating the filters are applied when Copilot generates new responses appears on the Copilot (preview) pane. This message also appears whenever you modify the filter configuration.
- A visual indicator with the number of filter options selected is displayed next to **Filters**..
- The filters set apply to the following Copilot features: ask a question, draft a chat, and email.
- The filter is saved. You don't have to set the filter each time you log in.

See also

Manage copilot features in Customer Service

Responsible AI FAQ for copilot features

View copilot analytics report

Article • 10/31/2023

Copilot in Dynamics 365 Customer Service helps agents to complete tasks related to conversations, cases, and email more easily. With the Copilot report in Customer Service historical analytics, supervisors and customer service managers can identify the impact that Copilot is having across their customer service operation.

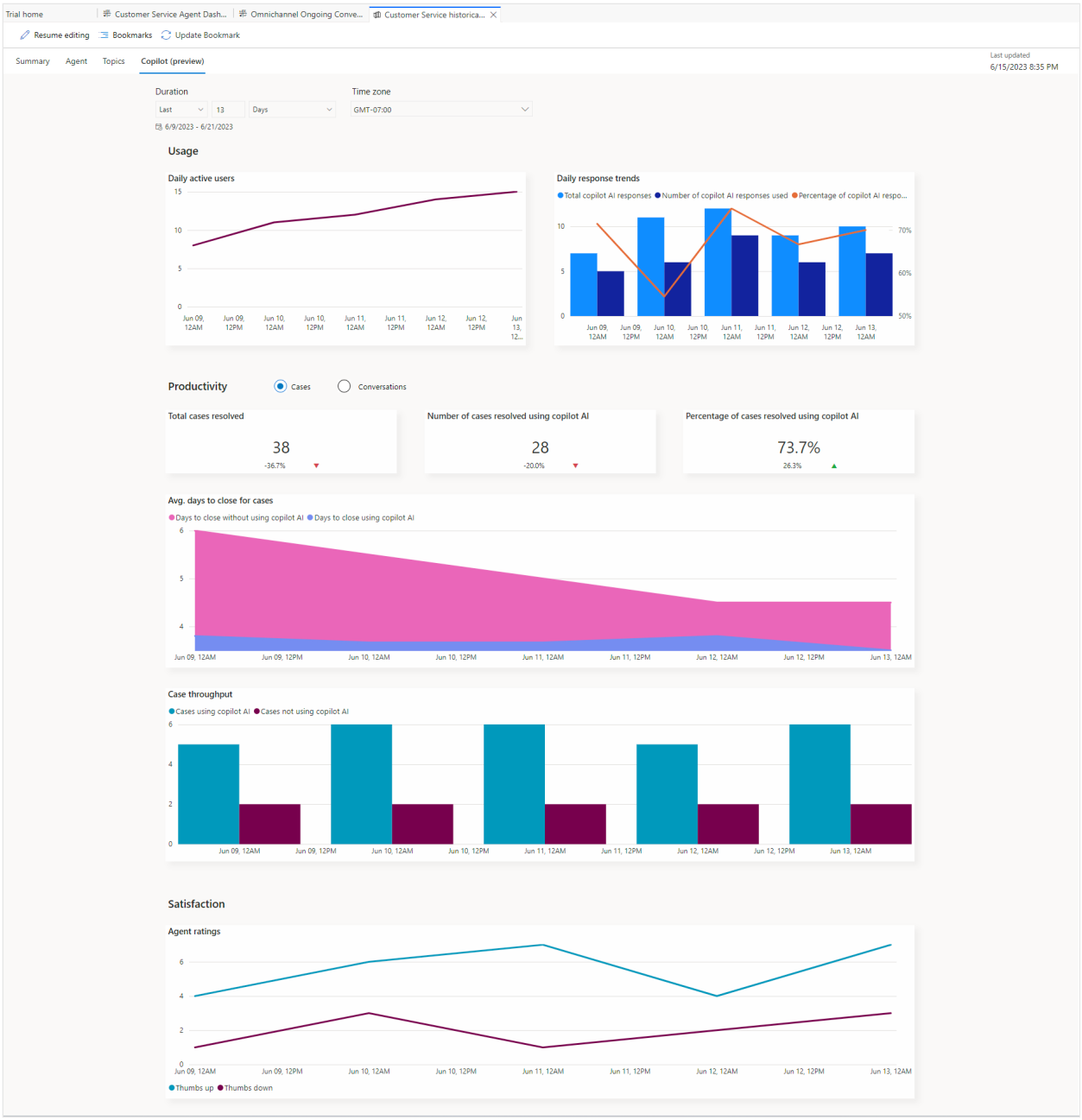
To view the Copilot report, open Customer Service historical analytics and select the **Copilot** tab.

Copilot report

You can use filters to focus on the information that's important to you:

- **Duration**: Filters the data by the selected value of day, week, or month.
- **Time zone**: Filters the data for the selected time zone.

The Copilot report displays the following metrics.



Usage

Metric	Description
Daily active users	The number of unique agents who used Copilot at least once in the last day
Total copilot AI responses	The total number of responses that Copilot provided
Number of responses used	The number of times that text from a copilot response was copied
Percentage of copilot AI responses used	The percentage of responses that were copied

Productivity: Cases

Metric	Description
Total cases resolved	The number of cases that were resolved when Copilot was available for use
Number of cases resolved using copilot AI	The number of cases that were resolved when Copilot was used
Percentage of cases resolved using copilot AI	The percentage of cases that were resolved when Copilot was used
Avg. days to close for cases	The average time that elapsed after the case was created and until it was resolved; displays data when Copilot was used and when it wasn't used
Case throughput	The number of cases that were resolved on average per day; displays data when Copilot was used and when it wasn't used

Productivity: Conversations

Metric	Description
Total conversations	The total number of conversations in which the agent engaged with the customer at least once while Copilot was available; doesn't include email and voice
Number of conversations using copilot AI	The number of engaged conversations that have used Copilot; lists only conversations that have ended
Percentage of conversations using copilot AI	The percentage of engaged conversations that have used Copilot
Avg conversation handle time	The average time that elapsed after a conversation started until it ended; displays data when Copilot was used and when it wasn't used
Conversation throughput	The number of conversations, excluding email and voice, completed on average per day; displays data when Copilot was used and when it wasn't used

Satisfaction

Metric	Description
Agent ratings	The number of times agents rated a Copilot response positively or negatively

See also

Use copilot features

Configure copilot

Enable historical analytics for Copilot

Manage fields Copilot uses for case summaries and emails

Article • 10/27/2023

Per your business requirement, you can modify the source case fields that Copilot uses to generate summaries or draft emails, thereby improving the context and accuracy of the results. You can also select a custom field that the Copilot should use to generate responses.

Modify the fields used to generate case summaries

Copilot uses the following fields to generate case summaries:

- Customer
- Case Title
- Case Type
- Subject
- Case Description
- Product
- Priority

In Customer Service admin center, perform the following steps to map your preferred fields:

1. Use one of the following navigation options:
    - **Agent Experience** > **Productivity** > **Summaries**
    - **Operations** > **Insights** > **Summaries**
2. In **Summaries**, for **Case summaries**, select the **Manage Data Attributes** link. On the **Data Attributes** pane, you see the default data attributes that Copilot uses.
3. Do the following actions:
    a. Select the attributes that Copilot uses to generate case summaries. Copilot considers only the selected fields when it's generating a summary.

> **Note**

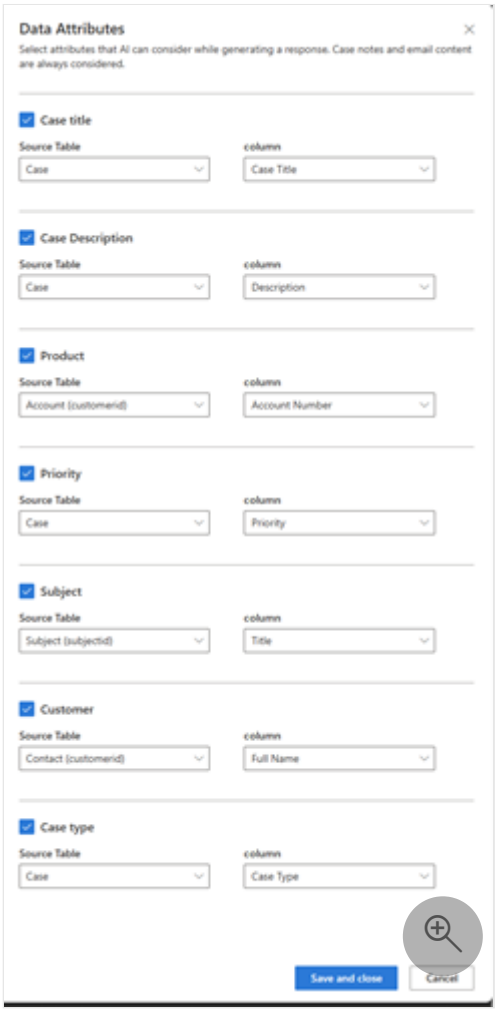
> The attributes related to case notes and email content aren't available on **Manage Data Attributes** but are considered to generate case summaries.

b. To modify the default attributes, perform the following steps:

- For the **Source Table** of the attribute, you can specify **Case** or any other related table. For example, for **Customer** attribute instead of **Case** and **Contact** you can specify **Account** as the source table and **Account Name** as the column. When Copilot generates a summary, it uses the value in the **Account Name** column of the **Account** table as the customer contact.
- For the column attribute, specify a column from the **Source Table**.

c. Select **Save and Close**.

4. Select **Save**.



Modify the fields used to draft emails

Copilot uses the following out-of-the-box case fields to draft emails:

- Case Title
- Case Description

- Customer Contact
- Subject

In Customer Service admin center, go to **Copilot help pane** and perform the steps in the Modify the fields used to generate case summaries section to modify the source fields that Copilot uses to draft emails.

Configure copilot features for custom case forms and custom apps

Article • 10/20/2023

You can configure the Copilot case summary on custom case forms and enable the Copilot features for custom apps.

Display Copilot case summary on custom case forms

When you enable the Copilot case summary feature, agents can see the case summary by default on out-of-the-box case forms. You can perform the following steps for the application to display the Copilot case summary on your custom case forms:

1. In Power Apps, add the **msdyn_CopilotCaseSummaryLibrary.js** web resource to your solution. For more information, see: Add a web resource to a solution.
2. Select **Add existing** > **More** > **Developer** > **Custom Control**. Search for and add the **mscrmcontrols.csintelligence.copilotcasesummarycontrol** custom control.
3. Select **Tables**, select **Case**, and then select **Forms**.
4. Create a new form or use an existing form. More information: Create, edit, or configure forms using the model-driven form designer.
5. In the form designer, select **Components** from the left navigation, select **CopilotCaseSummaryControl** and drag it on to the form.
6. Set the values of the following fields as:

    - **CC_CaseSummary**: Any unused string column. Copy the unique name of the specified column.
    - **CC_IncidentId**: **Case (Text)**

7. Set the **Show hidden** toggle to **On**.
8. Save and publish the customizations.

You must also configure the following settings to make sure that copilot summary doesn't load on the custom case form when the Copilot case summary feature isn't enabled or the agent experience profile linked to the agent doesn't have **Copilot** option enabled:

1. In Power Apps, add the event handler function for the On Change event. More information: Add or remove event handler function to event using UI.
2. Specify the following details in **Configure Event**:

- Set the **Event Type** to **On load**.
- Set the **Library** to **msdyn_CopilotCaseSummaryLibrary.js**
- Specify **Mscrm.CSIntelligence.CopilotCaseSummary.setVisibilityOfCaseSummary** in **Function**.
- Select **Pass execution context as first parameter** and specify the unique name of the table column value specified in **CC_CaseSummary**.

3. Save and publish the changes.

Enable Copilot features for custom apps

You can enable the Copilot features for custom apps in your organization. Perform the following steps enable the Copilot features for a specific app:

1. In Power Apps, add the **Customer Service Copilot Enabled** setting definition. More information: Add an existing setting definition.
2. In the **Edit Customer Service Copilot Enabled** pane, in set the **Setting app values** section, for a required app, set the **New app value** to **Yes**. More information: Update a setting definition.

Next steps

Use Copilot to solve customer issues (preview)

Configure copilot features for custom case forms and custom apps

Article • 10/20/2023

You can configure the Copilot case summary on custom case forms and enable the Copilot features for custom apps.

Display Copilot case summary on custom case forms

When you enable the Copilot case summary feature, agents can see the case summary by default on out-of-the-box case forms. You can perform the following steps for the application to display the Copilot case summary on your custom case forms:

1. In Power Apps, add the **msdyn_CopilotCaseSummaryLibrary.js** web resource to your solution. For more information, see: Add a web resource to a solution.
2. Select **Add existing** > **More** > **Developer** > **Custom Control**. Search for and add the **mscrmcontrols.csintelligence.copilotcasesummarycontrol** custom control.
3. Select **Tables**, select **Case**, and then select **Forms**.
4. Create a new form or use an existing form. More information: Create, edit, or configure forms using the model-driven form designer.
5. In the form designer, select **Components** from the left navigation, select **CopilotCaseSummaryControl** and drag it on to the form.
6. Set the values of the following fields as:

    - **CC_CaseSummary**: Any unused string column. Copy the unique name of the specified column.
    - **CC_IncidentId**: **Case (Text)**

7. Set the **Show hidden** toggle to **On**.
8. Save and publish the customizations.

You must also configure the following settings to make sure that copilot summary doesn't load on the custom case form when the Copilot case summary feature isn't enabled or the agent experience profile linked to the agent doesn't have **Copilot** option enabled:

1. In Power Apps, add the event handler function for the On Change event. More information: Add or remove event handler function to event using UI.
2. Specify the following details in **Configure Event**:

- Set the **Event Type** to **On load**.
- Set the **Library** to **msdyn_CopilotCaseSummaryLibrary.js**
- Specify **Mscrm.CSIntelligence.CopilotCaseSummary.setVisibilityOfCaseSummary** in **Function**.
- Select **Pass execution context as first parameter** and specify the unique name of the table column value specified in **CC_CaseSummary**.

3. Save and publish the changes.

Enable Copilot features for custom apps

You can enable the Copilot features for custom apps in your organization. Perform the following steps enable the Copilot features for a specific app:

1. In Power Apps, add the **Customer Service Copilot Enabled** setting definition. More information: Add an existing setting definition.
2. In the **Edit Customer Service Copilot Enabled** pane, in set the **Setting app values** section, for a required app, set the **New app value** to **Yes**. More information: Update a setting definition.

Next steps

Use Copilot to solve customer issues (preview)

Configure copilot features for custom case forms and custom apps

Article • 10/20/2023

You can configure the Copilot case summary on custom case forms and enable the Copilot features for custom apps.

Display Copilot case summary on custom case forms

When you enable the Copilot case summary feature, agents can see the case summary by default on out-of-the-box case forms. You can perform the following steps for the application to display the Copilot case summary on your custom case forms:

1. In Power Apps, add the **msdyn_CopilotCaseSummaryLibrary.js** web resource to your solution. For more information, see: Add a web resource to a solution.
2. Select **Add existing** > **More** > **Developer** > **Custom Control**. Search for and add the **mscrmcontrols.csintelligence.copilotcasesummarycontrol** custom control.
3. Select **Tables**, select **Case**, and then select **Forms**.
4. Create a new form or use an existing form. More information: Create, edit, or configure forms using the model-driven form designer.
5. In the form designer, select **Components** from the left navigation, select **CopilotCaseSummaryControl** and drag it on to the form.
6. Set the values of the following fields as:

    - **CC_CaseSummary**: Any unused string column. Copy the unique name of the specified column.
    - **CC_IncidentId**: **Case (Text)**

7. Set the **Show hidden** toggle to **On**.
8. Save and publish the customizations.

You must also configure the following settings to make sure that copilot summary doesn't load on the custom case form when the Copilot case summary feature isn't enabled or the agent experience profile linked to the agent doesn't have **Copilot** option enabled:

1. In Power Apps, add the event handler function for the On Change event. More information: Add or remove event handler function to event using UI.
2. Specify the following details in **Configure Event**:

- Set the **Event Type** to **On load**.
- Set the **Library** to **msdyn_CopilotCaseSummaryLibrary.js**
- Specify **Mscrm.CSIntelligence.CopilotCaseSummary.setVisibilityOfCaseSummary** in **Function**.
- Select **Pass execution context as first parameter** and specify the unique name of the table column value specified in **CC_CaseSummary**.

3. Save and publish the changes.

Enable Copilot features for custom apps

You can enable the Copilot features for custom apps in your organization. Perform the following steps enable the Copilot features for a specific app:

1. In Power Apps, add the **Customer Service Copilot Enabled** setting definition. More information: Add an existing setting definition.
2. In the **Edit Customer Service Copilot Enabled** pane, in set the **Setting app values** section, for a required app, set the **New app value** to **Yes**. More information: Update a setting definition.

Next steps

Use Copilot to solve customer issues (preview)

Overview of bots

Article • 07/19/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

A bot is a program that provides automated responses in a conversational manner to a customer. It can also help resolve customer queries by using case deflection. A bot can also collect basic information from a customer and then provide it to a customer service agent to work further on the issue raised by the customer.

A bot eases the load on your customer service agents by handling basic queries. This saves your agents' time so they can work on more complex issues. You can configure your bots to escalate a query to a human agent as required, or when requested by the customer.

In Omnichannel for Customer Service, you can integrate both Azure and Power Virtual Agents bots to perform tasks like starting a conversation with the customer, providing automated responses, and then transferring the conversation to a human agent, as required.

Integrate Azure and Power Virtual Agents bots

When you integrate bots with Omnichannel for Customer Service, you get the following capabilities:

- Seamlessly integrate your bots with chat and social channels without needing to add channel-specific code in the bot.
- Transfer chat conversations from bots to human agents, together with the full context of the conversation.
- Analyze the bot transcript that's available in Microsoft Dataverse after the conversation is completed.
- Configure routing rules to selectively route incoming requests to bots based on context, such as issue type or customer type. For example, you can route low-complexity issues to bots, or route the conversation to a sales or support bot based on the web browsing history of the customer.

- Monitor bot conversations in real time by using the supervisor dashboard, which includes details such as customer sentiment.
- Use historical dashboards to get insights into the effectiveness of the bots through metrics such as resolution rate, escalation rate, resolution time, escalation time, and average sentiment.
- Configure post-call surveys to measure customer satisfaction.

See also

Bot sessions and licensing
Integrate an Azure bot
Integrate Power Virtual Agents bot
Configure Power Virtual Agents bot for voice

Best practices for configuring bots

Article • 08/30/2022

When you configure context variables, check for the following conditions:

- The context variable name must be less than or equal to 100 characters.
- The context variable value must be less than or equal to 4,000 characters.
- Use exact match to pass the value to the context variable because it is case-sensitive.
- Use the context variable names as defined and don't change them when you author flows in Azure or Power Virtual Agents bots.

We recommend that you don't update or delete the context variables after you create them. If you do need to update or delete the variables, make sure that they aren't used in any of the unified routing classification or assignment rules.

When you configure Azure and Power Virtual Agents bots in Omnichannel for Customer Service, use the following best practices:

- In a queue, if both bots and human agents are available, set the bot's capacity higher than all agents. A bot's capacity isn't reduced even after a work item is assigned to it. This ensures that any conversation routed to the queue is first picked up by the bot.

- When a bot escalates a conversation to a human agent, make sure that the context variables being updated by the bot and the corresponding routing rules match correctly.

- When a conversation that's escalated by a bot comes back to the bot queue due to incorrect routing or context variables not being updated at runtime, the bot won't be assigned to the same conversation again. So, to prevent conversations from ending up in an infinite loop, you must configure a human agent for the bot queue.

- Unlike human agents, bots aren't added to a "default" queue at the outset; you must add them from the Omnichannel admin center or Customer Service admin center apps.

- The message size must be less than or equal to 28 KB in all messaging channels. The size limit includes metadata like timestamps and tags. If you're a bot author or developer and want to pass complex cards or message types across channels, ensure that your message size doesn't exceed the limit. If you're integrating a

custom channel via Direct Line, then make sure that the activity payload doesn't exceed the message size limit.

See also

Integrate an Azure bot
Integrate a Power Virtual Agents bot
Configure bots to escalate and end conversations
Manage context variables
Context variables for a bot

Manage your bots in Omnichannel for Customer Service

Article • 07/06/2023

In Omnichannel for Customer Service, you can seamlessly add a bot and get it up and running within a few minutes while the integration is taken care of in the background.

You can manage your Power Virtual Agents bots on the **Bots** page.

Prerequisites

Power Virtual Agents bots must be available in the tenant where Omnichannel for Customer Service is available.

Add a bot

When you add a bot by using the steps outlined in this section, the Power Virtual Agents bot is automatically registered in Azure and connected to Omnichannel for Customer Service. You'll then configure topics in Power Virtual Agents for the scenarios that you want the bot to handle.

1. In Customer Service admin center, select **Bots** under **Customer support**.
2. On the **Bots** page, select **Add**, and on the **Add a bot** page, select **Create new bot**, and then select **Next**.
3. On the **Create a basic bot** page, enter a name for your bot and select the primary language that the bot should use, and then select **Create**. The bot is created and listed on the **Bots** page.
4. Optionally, you can also add an existing bot if a bot is already created in Power Virtual Agents. The **Connect existing bot** option let you connect the bot. The bot is connected after a few minutes and listed on the **Bots** page.

> **ⓘ Important**
>
> Bots that you've created in Power Virtual Agents by using the **Try the unified canvas (preview)** option won't work with the voice workstreams.

Manage your bots

On the **Bots** page, you can review the bot details and also perform the following actions:

- Disconnect the bot.
- Select the bot name. The Power Virtual Agents app opens on a new tab where you can configure topics and other settings for the bot.

Next steps

Add a bot to a workstream
End bot conversation

See also

Get started with Customer Service admin center
Configure Power Virtual Agents bots for voice channel

Configure context variables for bots

Article • 07/21/2023

This article lists the context variables for Azure and Power Virtual Agents bots, and how you can configure them in Omnichannel for Customer Service. To understand how to create context variables, see Manage context variables.

Context variables for Azure bots

The following table contains the list of context variables in Omnichannel for Customer Service that you can use for configuring Azure bots.

Context variable type	Context variable name	Description	How to map in Azure
Pre-conversation survey	Use the question type that you create in Omnichannel for Customer Service.	The context variables for pre-conversation answers store the customer answers for questions in the pre-conversation survey.	Use the following information to map the question type variable in Omnichannel for Customer Service with the variable type in Azure: • **Single line**: String **Multiple lines**: String • **Option set**: String • **User Consent**: Boolean
Custom context	Use the variable name that you create in Omnichannel for Customer Service or pass using the setContextProvider API.	These are custom context variables	Map the user's response as a JSON to use custom

Context variable type	Context variable name	Description	How to map in Azure
		that can be created and passed through the live chat SDK.	context variable in Omnichannel for Customer Service.
Conversation	msdyn_ConversationId	Use the context variable that contains the conversation ID for the ongoing conversation and can fetch and perform operations on the record in Microsoft Dataverse.	**String**: String
Contact	msdyn_contact_msdyn_ocliveworkitem_Customer	Use this context variable that contains the record ID for the customer (contact) record that is linked to the conversation.	Parse JSON to extract record ID
Account	msdyn_account_msdyn_ocliveworkitem_Customer	Use this context variable that contains the record ID for the account record linked to the conversation.	Parse JSON to extract record ID

Context variable type	Context variable name	Description	How to map in Azure
Case	msdyn_incident_msdyn_ocliveworkitem	Use this context variable that contains the record ID for the case record linked to the conversation.	Parse JSON to extract record ID

> **Note**
>
> Use the context variable names as defined and don't change them when you author flows in Azure or Power Virtual Agents bots. Also, be sure to use exact match to pass the value to the context variable because it is case-sensitive. If there's a mismatch, the record won't get automatically identified. More information: **Identify records automatically**

Context variables for Power Virtual Agents bots

The following table contains the list of context variables available in Omnichannel for Customer Service that you can use for configuring Power Virtual Agents bots.

> **Important**
>
> To be able to use the messaging and voice variables, ensure that you first **install the extension solutions**.

Context variable type	Context variable name	Description	How to map in Power Virtual Agents
Pre-conversation survey	Use the question type that you create in Omnichannel for Customer Service.	The context variables for pre-conversation answers store the customer answers for questions in the pre-conversation survey.	Use the following information to map the question type variable in Omnichannel for Customer Service with the variable type in Power Virtual Agents:

Context variable type	Context variable name	Description	How to map in Power Virtual Agents
			• **Single line**: User's entire response **Multiple lines**: User's entire response • **Option set**: User's entire response • **User Consent**: Boolean
Custom context	Use the variable name that you create in Omnichannel for Customer Service or pass using the setContextProvider API.	These are custom context variables that can be created and passed through the live chat SDK.	Use the following information to map the custom context variable in Omnichannel for Customer Service with the variable type in Power Virtual Agents: • **String**: User's entire response **Boolean**: Boolean • **Number**, **Floating Number**: Number
Conversation	msdyn_ConversationId	Use the context variable that contains the conversation ID for the ongoing conversation and can fetch and perform operations on the record in Microsoft Dataverse.	**String**: User's entire response.
Messaging and voice variables	msdyn_CustomerType	Use this context variable that contains the customer type for the *account* or	Select the Omnichannel for Customer Service extension solution variable.

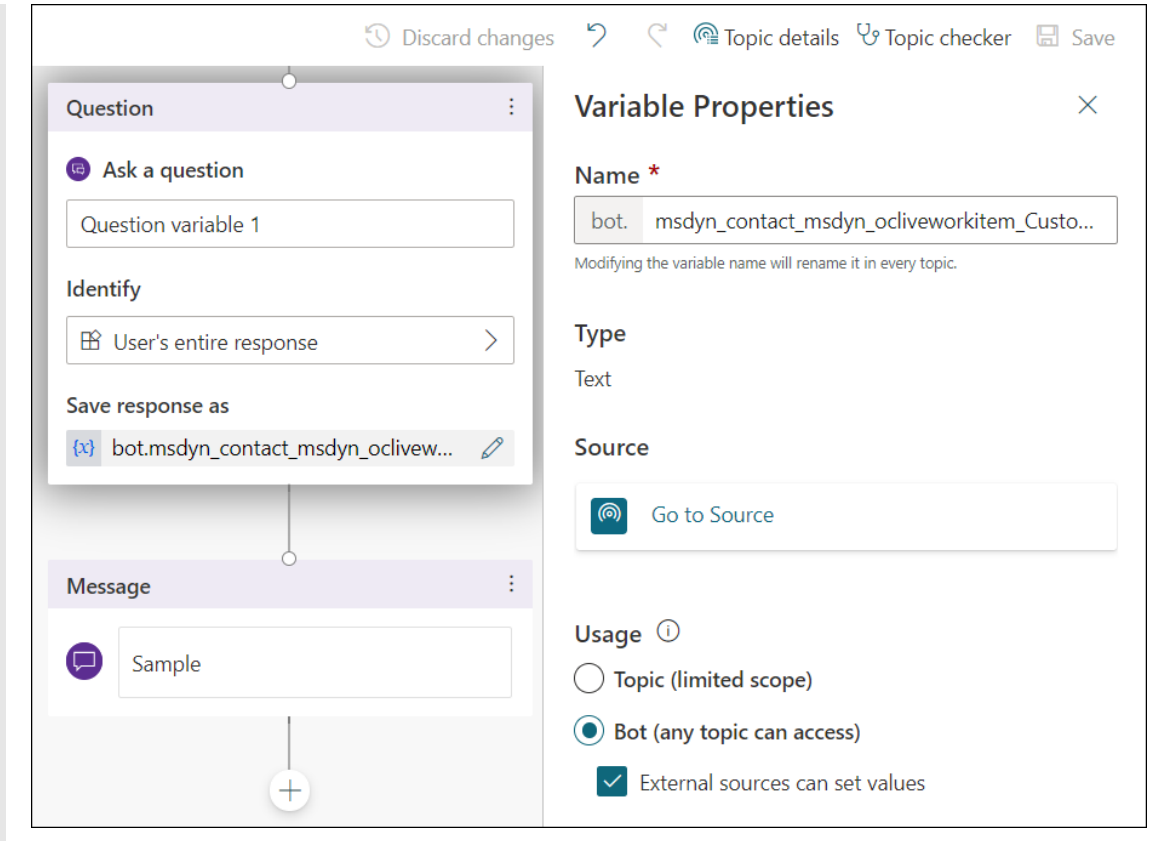
Context variable type	Context variable name	Description	How to map in Power Virtual Agents
		contact record that's linked to the conversation.	
	msdyn_CustomerName	Use this context variable that contains the customer name for the *account* or *contact* record that's linked to the conversation.	Select the Omnichannel for Customer Service extension solution variable.
	msdyn_CustomerId	Use this context variable that contains the customer ID for the *account* or *contact* record that's linked to the conversation.	Select the Omnichannel for Customer Service extension solution variable.
	msdyn_CaseId	Use this context variable that contains the ID of the case record that's linked to the conversation.	Select the Omnichannel for Customer Service extension solution variable.
	msdyn_CaseTitle	Use this context variable that contains the title of the case record that's linked to the conversation.	Select the Omnichannel for Customer Service extension solution variable.
Voice-only variables	CustomerPhoneNumber	Use this context variable for the customer's phone number that's provided in the Telephony activity.	Select the Omnichannel for Customer Service extension solution variable.
	OrganizationPhoneNumber	Use this context variable for the organization's phone number that's provided in the Telephony activity.	Select the Omnichannel for Customer Service extension solution variable.
Extension method	va_SurveyConsent	Use this dialog to determine if a	Use this method to escalate conversation

Context variable type	Context variable name	Description	How to map in Power Virtual Agents
name		customer has agreed to participate in surveys during the conversation.	details to Omnichannel for Customer Service.
	va_CustomerLocale	Use this dialog to transfer the user currently talking to the bot to another bot that can speak in a different language.	Set the code by selecting the input variable and using the correct locale code. For an example on how to set up this scenario, see Configure the routing rule in Dynamics 365 for Customer Service .

Configure context variables for Power Virtual Agents bot

In Power Virtual Agents, do the following:

1. On the **Topics** page, select **New topic**.
2. On the **Setup** tab, enter a name and description, and save the topic.
3. Select **Go to authoring canvas**.
4. Select **Add node**, choose the **Ask a question** action.
5. Edit the **Identify** field, and in the **Choose information to identify** dialog box, select an option that will match the context variable data type. For information on the data type mapping, see the information in the preceding table.
6. Edit **Save response as**, and in the **Variable Properties** dialog, update the value for **Name** with the required Omnichannel for Customer Service context variable. Make sure **Bot (any topic can access)** and **External sources can set values** are selected. The **External sources can set values** option is applicable only for getting the context variable.



7. Save and publish the changes.

At runtime, the required information is captured in the context variable that can then be used for further actions based on the workflow you configure. The bot can set the information for the context variables to link the conversation and case when the bot escalates the conversation to an agent. More information: Link customer and case to a conversation

You can also configure the **Transfer to agent** node in the Power Virtual Agents topic to send a private message with relevant context variables to the live agent during the escalation.

The global variables that are created in Power Virtual Agents can be passed to Omnichannel for Customer Service when a conversation is escalated. For the complete list, see Contextual variables available upon hand off.

Parse JSON object to extract record ID

Make sure that you have the following details:

- The Omnichannel for Customer Service context variable, such as msdyn_contact_msdyn_ocliveworkitem_Customer.
- The schema details

A copy of the sample schema details is as follows:

JavaScript

```
        Schema:
        {
            "type": "array",
            "items": {
                "type": "object",
                "properties": {
                    "RecordId": {
                        "type": "string"
                    },
                    "PrimaryDisplayValue": {
                        "type": "string"
                    }
                },
                "required": [
                    "RecordId",
                    "PrimaryDisplayValue"
                ]
            }
        }
```

`PrimaryDisplayValue` will contain the value from the attribute in the Dataverse entities. The mapping for the entity attributes is as follows:

- **Cases:** Case title
- **Contacts:** Full name
- **Accounts:** Name

Here's a sample context record.

JavaScript

```
{
    "msdyn_contact_msdyn_ocliveworkitem_Customer": [
        {
            "RecordId": "<GUID>",
            "PrimaryDisplayValue": "<FullName>"
        }
    ],
    "msdyn_liveworkitemid": "<GUID>"
}
```

See also

Integrate a Power Virtual Agents bot

Integrate an Azure bot

Configure bots to escalate and end conversations

Live chat SDK reference

Bot sessions and licensing

Article • 11/18/2022

A bot session is defined as a conversation in which a bot is invoked. The bot can be invoked at the start, middle, or end of a conversation.

- If two different bots are invoked in the same conversation, it is considered a single conversation.
- A conversation with a bot that's escalated to a human agent is considered a bot conversation.

The add-in applications such as Chat, Digital Messaging, and Voice channel are licensed per user. Each add-in application is entitled to a specific number of bot sessions. You can also purchase additional bot sessions on the Microsoft 365 admin center. More information: Buy add-ons

To know about the required subscriptions to use the chat and voice channels, see the Licensing section. For more information on licenses and pricing, see the Dynamics 365 licensing guide.

See also

Overview of bots
Integrate an Azure bot
Integrate Power Virtual Agents bot
Configure Power Virtual Agents bot for voice

Integrate an Azure bot

Article • 08/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

In Omnichannel for Customer Service, you can integrate Azure bots seamlessly with chat and social channels, and also repurpose Azure bots to be smart assist bots and provide recommendations to agents. For more information, see Manage smart assist and View smart assist suggestions. This article discusses how you can integrate Azure bots, configure routing rules, and set escalation rules.

Prerequisites

- Have a bot that's built using the Microsoft Bot Framework and registered with Azure Bot Service. Ensure that you register the bot resource as a multitenant app.

  To create an Azure bot resource, see Create Azure bot resource section in the Bot Framework SDK documentation. Be sure to note the values of the Microsoft App ID and the bot handle.

- Set the messaging endpoint in your bot configuration. More information: Configure bot settings

- Register your app on the Azure portal. Make a note of the registered app name.

> **Note**
>
> If you're using multiple bots, make sure that you create unique applications and have unique application IDs for each bot.

- To use the bot over messaging channels:
  - Add Omnichannel channel as a supported channel, if you're using public cloud services.
  - Add both Omnichannel channel and Microsoft Teams as supported channels, if you're using GCC (Government Community Cloud) services.

Integrate Azure bots with Omnichannel for Customer Service

After you've checked for the prerequisites, perform the following steps to integrate your Azure bots with Omnichannel for Customer Service.

1. Connect your Azure bot resource to Omnichannel channel.
2. Configure the bot user as an omnichannel agent.
3. Configure routing rules and context variables.
4. Add the bot user to queues.
5. Set escalation rules as required.

Connect your bot resource to Omnichannel channel

Perform the following steps to connect and register your bot with the Omnichannel channel.

1. Open the Azure portal, and then select your bot resource.
2. On the left pane, under **Settings**, select **Channels** and then select **Omnichannel** from the list of channels.
3. On the **Configure Omnichannel** page, select **Apply**.

Your bot is now registered with the Omnichannel channel.

Configure the bot user as an omnichannel agent

The bot user is first created as an application user and then assigned the **Omnichannel agent** role.

1. Open the PowerPlatform admin center.
2. Select the environment you want to configure, and then select **Settings**.
3. On the **Settings** page, select **Users + permissions**, and then select **Application users**.

4. On the **Application users** page, select **New app user** and in the **Create a new app user** dialog that opens, do the following:

   a. Select a **Business unit** in the list. Make sure that you select the top-level business unit.

   b. Edit the **Security roles** field, and in the **Add security roles** page, select **Omnichannel agent** from the dropdown list and select **Save** to go back to the **Create a new app user** dialog.

   c. Select **Add an app**. The **Add an app from Microsoft Entra Identity** dialog opens.

   d. Select the app that you created during your Azure app registration, and then select **Add** and **Create**.

5. Open your Power Platform environment and under **Settings** > **System** > **Security** > **Users**, search and open the newly created user.

6. Select the **APPLICATION USER** form.

7. In the **User Information** section, do the following:

   - **User type**: Select **Bot application user** from the dropdown list.
   - **Bot application ID**: Enter the Microsoft App ID from Microsoft Entra ID that you noted earlier from the **Prerequisites** section.
   - **Bot handle**: Enter the bot handle that you noted earlier from the **Prerequisites** section.

8. Select the save icon at the bottom of the page.

Add the bot user to queues

You can add a bot user to specific queues where you want the bot to handle the customer queries first, instead of the agent. For this, you must ensure that the bot user has the highest capacity among all users in the queue.

Alternatively, you can also create a queue with the bot user only. In such a case, ensure that the routing rules are set in a way that customer queries are sent to this queue first. This ensures that the bot acts as the first recipient for all queries.

An agent can transfer a chat to a bot by adding the bot to a queue, and then transferring the chat to the queue.

> ⓘ **Note**

- The chat cannot be transferred to the same bot.
- The bot works with the chat widget, workstream, and queues created in Omnichannel for Customer Service.

Configure routing rules

Routing rules route the incoming customer queries to their respective queues. Each routing rule has a condition and a destination queue. If the condition is evaluated as true, the customer query is routed to the destination queue. For bots, the condition is built by using context variables. To learn about context variables and how to add them, see Configure context variables for a bot.

Bots can be developed to receive customer queries first, gain information about the query, and then pass the query to a human agent if required. To achieve this behavior, you must first add the bot user to the queue and configure routing rules in a way that the incoming customer queries are routed to the queue with the bot user. Be sure to map the routing rules to the correct queues so that the queries are routed appropriately.

Set escalation rules

Escalation rules allow you to create rules for the bot to escalate the queries to the appropriate agent. For escalation rules, you must configure context variables and set routing rules to route the customer queries. If the bot escalates a customer query, it's routed to the appropriate queue as per the defined routing rule. Even if the query is redirected to the same queue, another agent in the queue will pick the conversation as per the capacity.

Privacy notice

You understand that your data may be transmitted and shared with external systems and that your data may flow outside of your organization's compliance boundary (even if your organization is in a Government Cloud environment). For example, your messages will be shared with the bot which could be interacting with a third-party system based on the integration done by you. For more information on how we process your data, please refer to the Microsoft Privacy Statement.

See also

Overview of bots
Sample configuration to integrate Azure bots
Best practices for configuring Azure and Power Virtual Agents bots
Integrate Power Virtual Agents bot
Create workstreams for unified routing
Work with queues in Omnichannel for Customer Service
View bot insights
Configure Azure bots to escalate and end conversation
Configure context variables for bots
Manage context variables
Create an application user

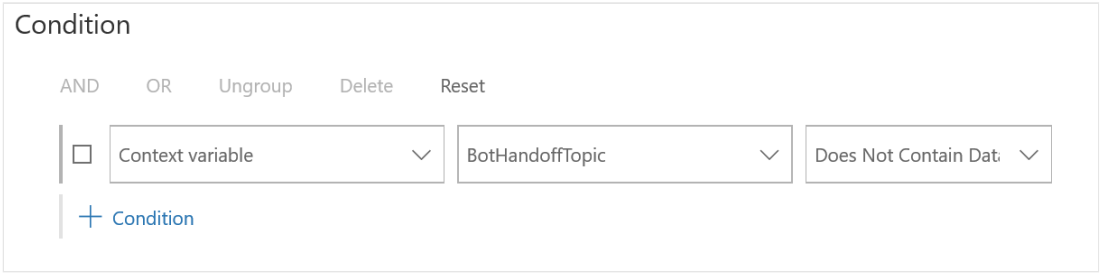
Sample configuration to integrate an Azure bot

Article • 08/30/2022

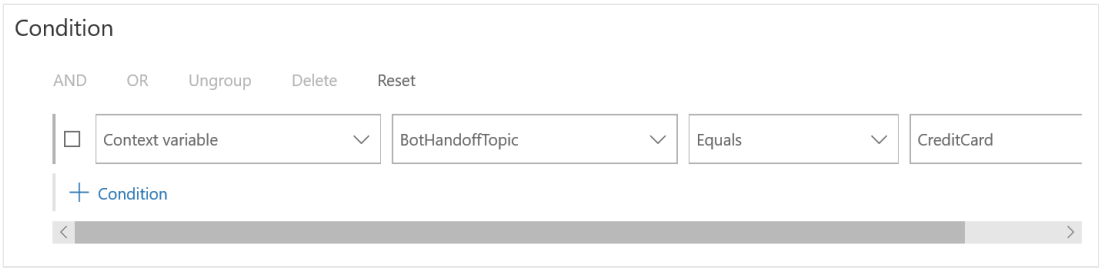
This article provides the exact steps and configuration values to integrate an Azure bot with Omnichannel for Customer Service, and then escalate the query to a human agent.

In this sample configuration, three queues and three routing rules are created. The bot user is added to one queue, and the agents are added to the two other queues. Routing rules are defined in such a way that whenever a customer starts a chat, it will be first sent to the bot, and then escalated to a human agent as per the conditions defined in the routing rules. The workstream used in this sample is **ChatWorkStream**.

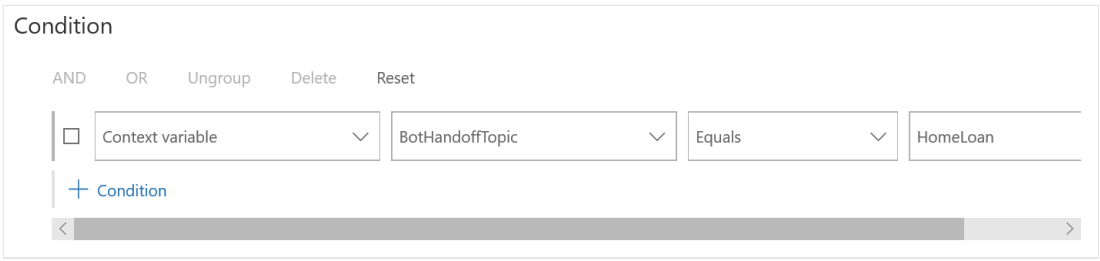
1. Configure the bot user as an omnichannel agent.
2. Create the following three queues and add users as follows:
    - **BotQueue**: Add the bot user to this queue.
    - **CreditCardQueue**: Add agents who will handle queries related to credit card.
    - **HomeLoanQueue**: Add agents who will handle queries related to home loan.
3. Add a context variable. Let's say you create a context variable named **BotHandoffTopic** in the **ChatWorkStream** workstream.
4. Create the following routing rules in the **ChatWorkStream** workstream in this order:
    - **BotRule**: Specify the workstream and queue as **ChatWorkStream** and **BotQueue**, respectively. Add the condition as follows:

    - **CreditCardRule**: Specify the workstream and queue as **ChatWorkStream** and **CreditCardQueue**, respectively. Add the condition as follows:



- **HomeLoanRule**: Specify the workstream and queue as **ChatWorkStream** and **HomeLoanQueue**, respectively. Add the condition as follows:



5. Configure the Azure bot to escalate and end conversations.

When a chat is started by a customer, the query is routed to the bot through the **BotRule** routing rule. If the bot escalates the query, it is sent to the appropriate agent as per the configured routing rules. The bot needs to send the correct context variable and its value in the escalation request to route the query appropriately.

See also

Integrate an Azure bot
Best practices for configuring Azure and Power Virtual Agents bots
Configure Azure bots to escalate and end conversation
Context variables for a bot
View bot insights

Integrate a Power Virtual Agents bot

Article • 08/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

> **Tip**
>
> If you'd like to try Dynamics 365 Customer Service for free, you can sign up for a **30-day trial**.

Microsoft Power Virtual Agents allows organizations to automate routine conversations, letting agents focus on high-value interactions. When a conversation is escalated from a bot to a human agent, the agent can see the full transcript of the bot conversation and get complete context while engaging with the customer. More information: Enable a bot to escalate and end conversation

When you integrate a Power Virtual Agents bot with Omnichannel for Customer Service, you get the following capabilities for bot conversations:

- Seamlessly integrate your bot with all channels without needing to add channel-specific code in the bot.
- Transfer bot conversations to human agents, and include the full context of the conversation.
- Analyze the bot transcript that's available in Microsoft Dataverse after the chat is completed.
- Configure routing rules to selectively route incoming requests to bots based on context, such as issue type or customer type. For example, you can route low-complexity issues to bots, or route the conversation to a sales or support bot based on the webpage browsing history of the customer.

- Monitor the bot conversations in real time by using the supervisor dashboard, which includes details such as customer sentiment.
- Use the historical dashboards to get insights into the effectiveness of the bots through metrics, such as resolution rate, escalation rate, resolution time, escalation time, and average sentiment.

Prerequisites

Before you integrate Power Virtual Agents bots in Omnichannel for Customer Service, check the following:

1. You must have:

    - A product license for Power Virtual Agents. More information: Licensing for Power Virtual Agents

    - A product license for chat, digital messaging, or voice channel for Dynamics 365 Customer Service, depending on your business requirements. More information: Licensing

2. You must have the Omnichannel administrator role. More information: Manage user roles

3. You'll need an application registered on the Azure portal before connecting to Omnichannel for Customer Service. More information: Register an application with Azure AD

4. You must have a preconfigured bot that can integrate with Omnichannel for Customer Service. More information: Configure seamless and contextual hand-off to Omnichannel for Customer Service

Install Power Virtual Agents extensions

Power Virtual Agents lets you seamlessly hand off voice and text-based conversations to human agents using the chat, digital messaging, and voice channels in Dynamics 365 Customer Service. For your bot to hand off conversations to the omnichannel interface, you must install the Power Virtual Agents extension solutions for Dynamics 365 Customer Service.

To do so, perform the following steps:

1. Ensure the prerequisites are met.
2. Install the extension solutions.

3. Verify if the extension solutions are successfully installed by checking whether the extension solution variables are available in Power Virtual Agents.

Connect your Power Virtual Agents bot to omnichannel instance

Follow the procedure in the section Connect omnichannel to your Power Virtual Agents bot to connect your Power Virtual Agents bot to the omnichannel instance.

> ⓘ **Note**
>
> If you're using multiple bots, make sure that you create unique applications and have unique application IDs for each bot.

Configure your Power Virtual Agents bot in the admin app

In Customer Service admin center or Omnichannel admin center, select the Power Virtual Agents bot from the list of bots in the **Workstreams** area, so the bot can be used to hand off conversations to human agents. For more information, see Add a bot to a workstream.

> ⓘ **Note**
>
> Bots can receive conversations only if they're added to push-based workstreams.

Enable a human agent to transfer a conversation back to a bot

Some support scenarios may require a human agent to transfer a conversation back to a Power Virtual Agents bot after delivering personalized support. This transfer from human agent to bot may be used to provide further assistance with basic, repetitive tasks, or to collect additional data, as in a customer survey.

You can facilitate the transfer of a conversation from a human agent back to a bot in the following ways:

- Create two bots that reside in two queues

- Create two bots that reside in the same queue

Two bots in two queues

In this scenario, a bot has transferred a conversation to a human agent. The human agent will transfer the conversation again to another bot in another queue.

1. A customer starts a conversation.
2. The conversation is routed to Queue 1.
3. The first bot (Bot A) accepts the conversation.
4. The customer requests to chat with a human agent.
5. The conversation is transferred to a human agent within Queue 1.
6. The customer converses with the human agent.
7. The human agent has completed delivering support and wants to hand off the conversation to a second bot (Bot B), which resides in Queue 2.
8. The human agent is disconnected from the conversation.
9. The conversation routed to Bot B in Queue 2.
10. The system triggers Bot B to send a greeting message.
11. The customer now chats with Bot B.

Two bots in one queue

In this scenario, after a bot has transferred a conversation to a human agent, the agent will transfer the conversation to another bot in the same queue when the agent's task is over. For the conversation to flow correctly, you must set the first bot (Bot A) with the highest capacity, the human agent with the next highest capacity, and the second bot (Bot B) with the lowest capacity.

1. A customer starts a conversation that is routed to a queue.
2. The first bot (Bot A) that has the highest capacity accepts the conversation.
3. The customer requests to chat with a human agent.
4. The conversation is transferred to a human agent as the agent has second-highest capacity.
5. The customer chats with the human agent.
6. The human agent has finished delivering support and wants to hand off the conversation to a second bot (Bot B), which resides in the same queue.
7. The human agent is disconnected from the conversation, and the conversation is routed to Bot B.
8. Bot B receives the messages in the following order:

    - A conversation update that the “Bot is added”

- The Omnichannel Set context event

9. The system triggers Bot B to send a greeting message.
10. The customer now chats with Bot B.

Configure context variables for the Power Virtual Agents bot

After you've configured your bot and added it to a workstream, you can configure context variables to route work items. You can also share context from Omnichannel with your Power Virtual Agents bot to create a rich and personalized experience. For information about creating context variables, see Manage context variables. For information about configuring context variables for Power Virtual Agents bots, see Configure context variables for Power Virtual Agents bot.

Automatically close a conversation

When a bot receives a conversation that's subsequently not escalated to a human agent, the conversation is closed if the customer abandons it. The conversation will also be closed automatically after 30 minutes of inactivity.

This conversation will then appear in the **Closed** state in the Omnichannel for Customer Service dashboard and in the **Resolved/abandoned** state in the Power Virtual Agents dashboard. For more information on the state of conversations, see Session outcomes over time chart.

End bot conversation

You must configure the Power Virtual Agents web app bot to end a conversation. More information: End conversation

After a customer closes the chat window, you must also configure a context variable that explicitly ends the conversation in Omnichannel for Customer Service.

1. In Power Virtual Agents, for the selected bot, add a new topic.

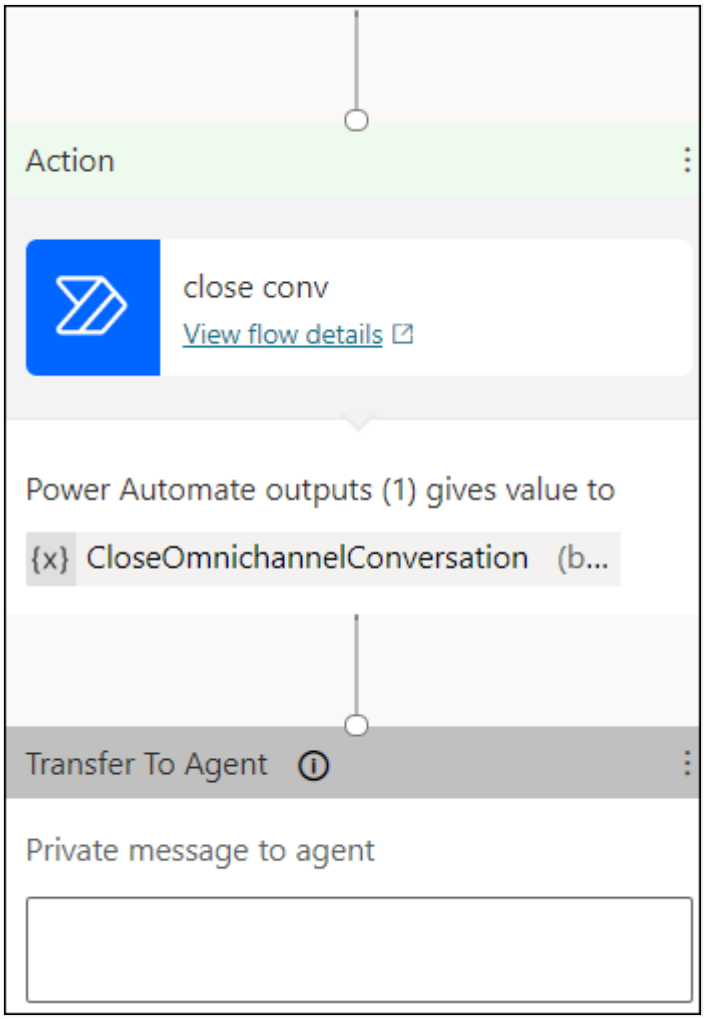
2. Select **Go to authoring canvas**, and in **Add node**, select **Call an action**, and then select **Create a flow**.

3. On the Power Automate window that opens on a new tab, do the following:
   a. In the **Return value(s) to Power Virtual Agents** box, select **Add an output**, and then select **Yes/No**.

b. In the **Enter title** box, enter CloseOmnichannelConversation, which is the Omnichannel for Customer Service context variable name.
c. In the **Enter a value to respond** box, select the **Expression** tab, and then enter **bool(true)** to build the expression, and select **OK**.
d. Save the changes, and then exit Power Automate.

4. In the topic that you were editing, select **Call an action** again, and then in the list, select the flow that you created.

5. In **Add node**, select **End the conversation**, and then select **Transfer to agent**.



6. Go to the topic in which you need to invoke the topic for ending the bot conversation in Omnichannel for Customer Service, and use the **Go to another topic** option in **Add a node**.

7. Select the topic that you created for ending the bot conversation.

8. Save and publish the changes.

Limitations

Description	Limitation
Adaptive cards An adaptive card is a customizable card that can contain any combination of text, speech, images, buttons, and input fields.	• You can build an adaptive card by adding a skill through Power Virtual Agents. More information: Use Microsoft Bot Framework Skills in Power Virtual Agents • Adaptive card styling isn't supported.
Typing A bot receives a typing activity to indicate that the user is typing a response. A bot may send a typing activity to indicate to the user that it is working to fulfill a request or compile a response.	Typing indicators won't appear.
Format bot messages You can set the optional `TextFormat` property to control how the text content of your message is rendered.	• Power Virtual Agents does not support Markdown with images and text. • When Power Virtual Agents sends Markdown text, there's an extra space between lines.
OAuth card in Microsoft Teams Using a chat bot and presenting an OAuth card in the Microsoft Teams channel.	In Power Virtual Agents, the sign-in node presents an OAuth card and it doesn't work properly.

Privacy notice

You understand that your data may be transmitted and shared with external systems and that your data may flow outside of your organization's compliance boundary (even if your organization is in a Government Cloud environment). For example, your messages will be shared with the bot which could be interacting with a third-party system based on the integration done by you. For more information on how we process your data, see Microsoft Privacy Statement.

Troubleshoot issues for bots

How to end a bot conversation in Omnichannel for Customer Service

Configure your Power Virtual Agents bot in Omnichannel Administration

Important

> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

In Omnichannel Administration, after the Power Virtual Agents bot is created and configured to work with Omnichannel for Customer Service, you can configure it to hand off conversations to queues. To receive incoming messages, you must add the bot to at least one queue. The bot will use the routing rules that were created at setup.

1. Connect the bot to Omnichannel for Customer Service and go to the Omnichannel Administration app. More information: Configure seamless and contextual hand-off to Omnichannel for Customer Service
2. Assign the bot to an existing queue.
3. Select **Done**. Now you're on the bot profile page and you can see that your bot is connected.

   Your bot is ready to accept and respond to customer-initiated conversations.

Create a bot queue and a human agent queue

1. Select or create a workstream. More information: Understand and create workstreams
2. Create context variables.

   You must use the context variables that were created during setup for the bot to handle the customer queries appropriately. The context variable is used in routing the incoming customer queries to the appropriate bots and agents. More information: Contextual variables available upon hand-off
3. Create a routing rule for the human agent and add it to the workstream.
4. Create a routing rule for the virtual agent and add it to the workstream.

Routing rules route the incoming customer queries to their respective queues. Each routing rule has a condition and a destination queue. If the condition is evaluated as true, the customer query is routed to the destination queue. For bots, the condition is built by using the context variable.

Bots are developed to receive customer queries first, gain information of the query, and then pass the query to a human agent, if required. To achieve this behavior, you must

add a bot user to the queue and configure routing rules in a way that the incoming customer queries are routed to the queue with bot user.

Be sure to map the routing rules to the correct queues so that the queries are routed appropriately.

> **Note**
>
> When you run a report on Power Virtual Agents activity, the number of bot sessions may differ from the number of sessions in Omnichannel for Customer Service.

Set escalation rules

You can set escalation rules in one of the following ways so the bot can route the queries to the appropriate agent:

- **Add the bot to an existing human agent queue**: If you add the bot to an existing human agent queue, you don't need to change your existing routing rule. Existing routing rules will send incoming messages to the Power Virtual Agents bot. When a handoff is triggered, customers will be transferred from the Power Virtual Agents bot to the human agent according to the escalation routing rules.
- **Create a bot queue and a human agent queue**: If you create two queues, you must create workstreams that contain context variables and appropriate routing rules to route the customer queries. More information: Work with queues in Omnichannel for Customer Service

Videos

Power Virtual Agents integration with Omnichannel for Customer Service

To view more videos on Omnichannel for Customer Service, see Videos.

See also

Manage your bots
Integrate an Azure bot
Manage context variables
Configure context variables for bots
Identify customers automatically
Enable a bot to escalate and end conversation

Best practices for configuring Azure and Power Virtual Agents bots
Work with queues in Omnichannel for Customer Service
Understand and create workstreams
Create and edit topics in Power Virtual Agents bot
Suggested actions
Add a chat widget

Configure bot context

Article • 07/21/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Bot context includes context name-value pairs for the current conversation and custom context passed by API programmatically. When customers start a conversation, the relevant context that's related to the customer, the issue they're facing, and recent activities performed by them can be made available for the bot to intelligently provide contextual responses to resolve customer issues in a quick and efficient manner. For example, the bot can use the signed-in user details to look up the recent case information or order history of the customer and provide a response. Similarly, the pre-conversation information, custom context, or recent pages browsed on a website by the customer can be passed on to the bot by configuring context variables for your bots.

For Azure bots, see Configure bot context in Azure bots. For Power Virtual Agents bots, see Configure bot context in Power Virtual Agents bots.

Next steps

Configure bot context in Azure bots
Configure bot context in Power Virtual Agents bots

See also

Send custom context
setContextProvider
Integrate an Azure bot

Configure bot context in Azure bots

Article • 07/21/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

For Azure bots, you must install the bot SDK and instantiate the Omnichannel middleware before you configure bot context.

Install the bot SDK in your project

1. To open the NuGet Package Manager, right-click your project and then select **Manage NuGet Packages**.
2. In the NuGet Package Manager, select the package source as **nuget.org** and browse for "Microsoft.Xrm.Omnichannel.BotSDK". Select the package and then select **Install**. More information: Nuget page

Alternatively, you can use the following command in NuGet CLI.

```
JavaScript

Install-Package Microsoft.Xrm.Omnichannel.BotSDK
```

The bot SDK is now installed and the Omnichannel middleware is available in your project.

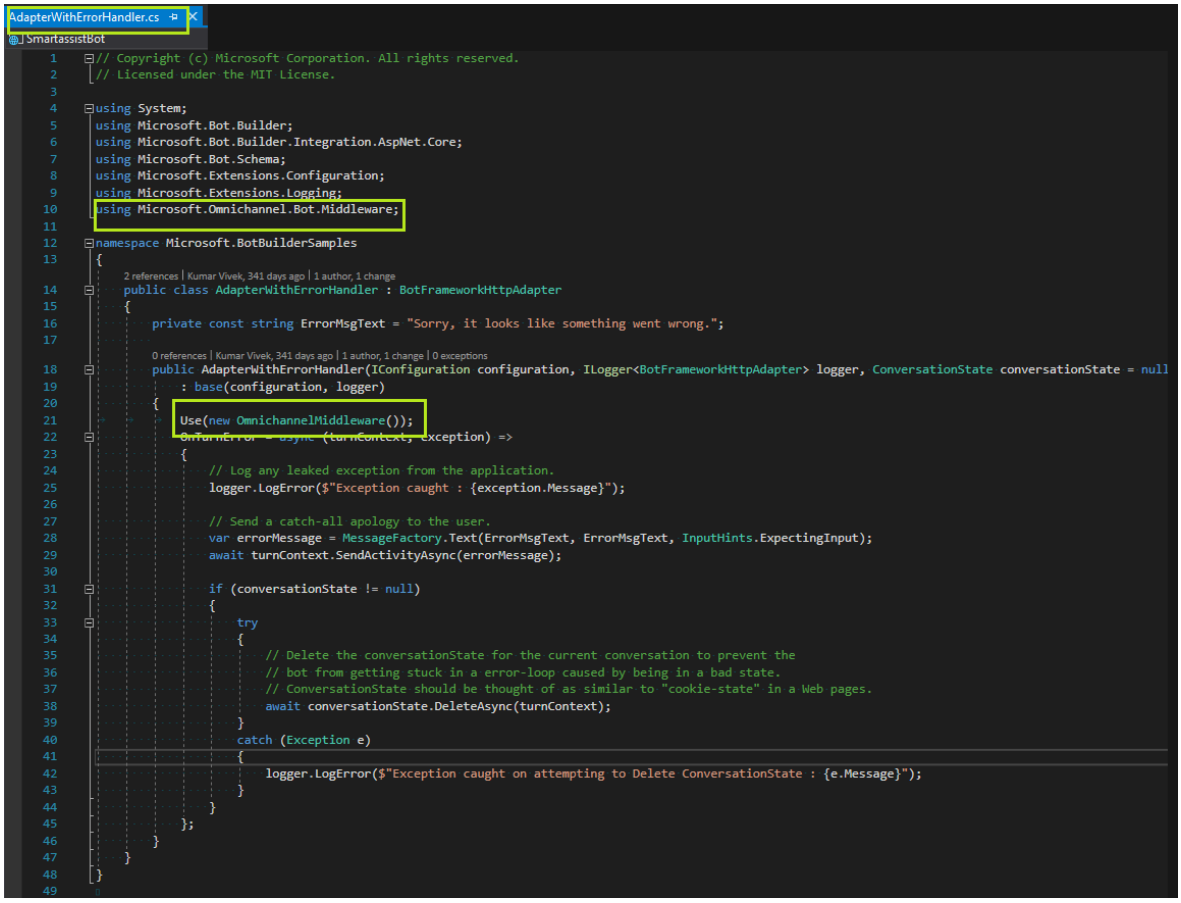
Use the Omnichannel middleware in your bot code

Use this procedure if you've created your bot using Visual Studio Azure Bot template or Azure portal.

1. Open the **AdapterWithErrorHandler.cs** file.
2. Add the import statement and instantiate the Omnichannel middleware.

CSharp

```
using Microsoft.Omnichannel.Bot.Middleware;
Use(new OmnichannelMiddleware());
```



Next steps

Parse activity JSON to get bot context

See also

Send custom context
setContextProvider
Integrate an Azure bot

Parse event activity JSON to get bot context

Article • 07/21/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The Omnichannel for Customer Service context messages are sent as event activity to bots. Context information such as customer info, live work item, or conversation ID, is sent to the bot as part of an activity JSON. The JSON can be of type **startConversation** for most channels and **ConversationUpdate** for voice conversations.

Fetch and use context for bots in your bot code

To process these context messages, use activity handlers and override them in your bot code. For information on how to use activity handlers, see Event-driven conversations using an activity handler.

In the following example, when the event activity is received, the `OnEventActivityAsync` method is called to fetch and use the context.

CSharp

```
protected override async Task
OnEventActivityAsync(ITurnContext<IEventActivity> turnContext,
CancellationToken cancellationToken)
        {
            if (turnContext.Activity.Name == "omnichannelSetContext")
           {
                // Replace with your logic to fetch the context from
Activity.Value
                IActivity replyActivity = MessageFactory.Text($"Received
context :  {turnContext.Activity.Value.ToString()}");

                // Replace with your logic to consume the context
                await turnContext.SendActivityAsync(replyActivity,
cancellationToken);
            }
        }
```

Next steps

Code samples for parsing activity JSON

See also

setContextProvider
Integrate an Azure bot

Configure bot context in Power Virtual Agents bots

Article • 07/21/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As a bot author, you can enable your Power Virtual Agents bots to understand context while authoring a bot flow.

Install extensions

Follow the steps mentioned in this article: Install Power Virtual Agents extensions.

Connect to omnichannel instance

Follow the steps mentioned in this article: Connect your Power Virtual Agents bot to omnichannel instance.

Next steps

Use the information in one of the following articles to configure context variables:

- Configure context variables for bots
- Getting started with Bot Framework Composer
- Create expressions using Power Fx

See also

Send custom context
setContextProvider
Integrate an Azure bot

Code samples for parsing activity JSON

Article • 07/21/2023

This article includes some samples for parsing the activity JSON object in various channels. The following sample code retrieves the context sent from Omnichannel for Customer Service so that it can be passed on to an Azure or Power Virtual Agents bot.

Live Chat

JSON


```
{
         "id":"1654211880034",
         "type":"event",
         "timestamp":1654211880,
         "from":{
            "id":"965ee9c9-a809-b56c-5498-b116ae3b9e16",
            "role":1
         },
         "name":"startConversation",
         "channelId":"lcw",
         "textFormat":"Text",
         "text":"{\"msdyn_inbox_threadids\":\"
{\\\"t1ChatId\\\":\\\"19:Mmy0P4lmPkVqRSSf0btCLjr-mU2vzEpZ-
B5fXoxoMq81@thread.v2\\\",\\\"t2ChatId\\\":\\\"19:_7UGOckTtmK5v9-
ePY4HtVvOIG8kAGuNXOxtu7Z4TKQ1@thread.v2\\\",\\\"platformtype\\\":\\\"ACS\\\"
}\",\"msdyn_msdyn_ocliveworkitem_msdyn_livechatengagementctx_liveworkitemid\
":[{\"RecordId\":\"5d6dfef2-11b4-4eb7-a51f-
c76b27279fc3\",\"PrimaryDisplayValue\":\"\"}],\"EventName\":\"startConversat
ion\",\"msdyn_liveworkitemid\":\"5ba69c2c-40b5-4af2-bd76-a94c10bd4f43\"}",
         "attachments":[
         ],
         "value":{
            "msdyn_inbox_threadids":"
{\"t1ChatId\":\"19:Mmy0P4lmPkVqRSSf0btCLjr-mU2vzEpZ-
B5fXoxoMq81@thread.v2\",\"t2ChatId\":\"19:7UGOckTtmK5v9-
ePY4HtVvOIG8kAGuNXOxtu7Z4TKQ1@thread.v2\",\"platformtype\":\"ACS\"}",

"msdyn_msdyn_ocliveworkitem_msdyn_livechatengagementctx_liveworkitemid":[
               {
                  "RecordId":"5d6dfef2-11b4-4eb7-a51f-c76b27279fc3",
                  "PrimaryDisplayValue":""
               }
            ],
            "msdyn_liveworkitemid":"5ba69c2c-40b5-4af2-bd76-a94c10bd4f43"
         },
         "channeldata":{
            "Microsoft.azure.communication.chat.bot.contenttype":null,
            "tags":"ChannelId-lcw,OmnichannelContextMessage,Hidden",
```

```
            "sourceChannelId":"omnichannel"
         }
}
```

Voice channel

JSON

```
{
        "id":"7b5123f2-0562-4d04-b464-648d8f3ca887",
        "type":"conversationUpdate",
        "timestamp":1653669440,
        "from":{
            "id":"77adeae1-5d97-dabf-d9ce-a823f17c3bdb",
            "role":1
        },
        "channelId":"telephony",
        "attachments":[
        ],
        "replyToId":"b196ebf7-47a9-4f34-9d2e-63a73295255a",
        "channeldata":{
            "vnd.microsoft.msdyn.oc.data":{
               "voices":{
                  "en-US":{
                     "voiceName":"en-US-JennyNeural",
                     "voiceStyle":"assistant",
                     "pitch":0,
                     "speakingSpeed":0
                  }
               },
               "customerPhoneNumber":"+15092924729",
               "organizationPhoneNumber":"+18336321583",
               "msdyn_ocliveworkitemid":"9389a2a1-ec10-48da-a793-
6c079568e47b"
            }
         }
}
```

Apple Messages for Business channel

JSON

```
{
         "id":"1654048788512",
         "type":"event",
         "timestamp":1654048788,
         "from":{
            "id":"965ee9c9-a809-b56c-5498-b116ae3b9e16",
            "role":1
```

```
        },
        "name":"startConversation",
        "channelId":"applemessagesforbusiness",
        "textFormat":"Text",
        "text":"{\"msdyn_inbox_threadids\":\"
{\\\"t1ChatId\\\":\\\"\\\",\\\"t2ChatId\\\":\\\"19:kTDDWx7UQhjJ44eyDDQD5-
SUWBIncL6ae_TXyWWPyz81@thread.v2\\\",\\\"platformtype\\\":\\\"ACS\\\"}\",\"m
sdyn_msdyn_ocliveworkitem_msdyn_ocapplemessagesforbusinessengagementctx_live
workitemid\":[{\"RecordId\":\"e7b96ab8-914b-4563-a371-
5fe73724f1a5\",\"PrimaryDisplayValue\":null}],\"msdyn_capabilitylist\":\"AUT
H,LIST,TIME,FORM,QUICK\",\"msdyn_socialprofile_msdyn_ocliveworkitem_socialpr
ofileid\":[{\"RecordId\":\"667a3856-b2a9-4a36-8627-
b725e4698645\",\"PrimaryDisplayValue\":null}],\"EventName\":\"startConversat
ion\",\"msdyn_liveworkitemid\":\"88b32c66-61f2-4c46-95ce-72a263113686\"}",
        "attachments":[
        ],
        "value":{
           "msdyn_inbox_threadids":"
{\"t1ChatId\":\"\",\"t2ChatId\":\"19:kTDDWx7UQhjJ44eyDDQD5-
SUWBIncL6ae_TXyWWPyz81@thread.v2\",\"platformtype\":\"ACS\"}",

"msdyn_msdyn_ocliveworkitem_msdyn_ocapplemessagesforbusinessengagementctx_li
veworkitemid":[
              {
                 "RecordId":"e7b96ab8-914b-4563-a371-5fe73724f1a5",
                 "PrimaryDisplayValue":null
              }
           ],
           "msdyn_capabilitylist":"AUTH,LIST,TIME,FORM,QUICK",
           "msdyn_socialprofile_msdyn_ocliveworkitem_socialprofileid":[
              {
                 "RecordId":"667a3856-b2a9-4a36-8627-b725e4698645",
                 "PrimaryDisplayValue":null
              }
           ],
           "msdyn_liveworkitemid":"88b32c66-61f2-4c46-95ce-72a263113686"
        },
        "channeldata":{
           "microsoft.azure.communication.chat.bot.contenttype":null,
           "tags":"ChannelId-
applemessagesforbusiness,OmnichannelContextMessage,Hidden",
           "sourceChannelId":"omnichannel"
        }
}
```


See also

Send custom context

setContextProvider

Integrate an Azure bot

Integrate Power Virtual Agents bot

Configure Azure bots to escalate and end conversations

Article • 08/30/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This article explains how you can program an Azure bot to route a conversation to a human agent in Omnichannel for Customer Service. It also describes how to program the bot to end the conversation.

Important

- Bots can receive conversations only if they're added to push-based workstreams.
- Bot agents are not supported in consult mode.

Prerequisites

- You must have an Azure bot that's configured and integrated with Omnichannel for Customer Service. More information: Integrate an Azure bot
- Skill-based routing should be enabled.

Escalate a conversation to a human agent

In Omnichannel for Customer Service, a bot can escalate the current conversation to a human agent. The routing of the conversation depends on the routing rule that's configured for the workstream.

When the conversation is transferred from the bot to a human agent, the customer and case details are automatically identified when the agent accepts the escalation request. The bot routes conversations by using the Omnichannel for Customer Service context variables that are associated with the conversation. The bot can send a list of context variables and associated values to Omnichannel for Customer Service, together with the

escalation request. The bot can also set context items that can be used by skill finder models to identify new skills and append them to the existing skills list for the conversation. Omnichannel for Customer Service will then update the context variables with the specified values, and run the routing engine again. This ensures that the escalated conversation is routed to the right queue. For information on the context items and variable names, see Link customer and case to conversations when bot escalates or ends conversations.

After the agent accepts the escalation request, the transcript of the bot's conversation with the customer is visible on the agent's conversation widget. The agent can then continue the conversation with the customer.

> **Note**
>
> The conversation summary won't be visible to the customer.

End a conversation

The Azure bot can choose to end the conversation if it determines that the customer's questions have been answered, or if the customer is no longer responding. The bot can send an `EndConversation` request to Omnichannel for Customer Service.

Sample code

This section includes code samples that you can use to configure an Azure bot to escalate and end conversations.

1. Implement a command class to model tasks related to escalating and ending conversations.

The sample code is as follows.

C#

```
using System.Collections.Generic;
using System.Runtime.Serialization;
using Newtonsoft.Json;
using Newtonsoft.Json.Converters;

namespace EchoBot.OmniChannel
{
    /// <summary>
    /// Command types that bot can send to Omnichannel
```

```
    /// </summary>
    [JsonConverter(typeof(StringEnumConverter))]
    public enum CommandType
    {
        [EnumMember(Value = "Escalate")]
        Escalate = 0,
        [EnumMember(Value = "EndConversation")]
        EndConversation = 1,
    }
    /// <summary>
    /// Action
    /// </summary>
    [DataContract]
    public class Command
    {
        /// <summary>
        /// Type of action that bot can send to Omnichannel
        /// </summary>
        [DataMember(Name = "type")]
        public CommandType Type { get; set; }

        /// <summary>
        /// Dictionary of Workstream Context variable and value pairs to be
sent to Omnichannel for Customer Service
        /// </summary>
        [DataMember(Name = "context")]
        public Dictionary<string, object> Context { get; set; }
    }
}
```

2. Implement an Omnichannel for Customer Service client class to set the command context.

The sample code is as follows.

C#

```
using Microsoft.Bot.Schema;
using Newtonsoft.Json;
using System.Collections.Generic;

namespace EchoBot.OmniChannel
{
    /// <summary>
    /// Extension class for middleware implementation management
    /// </summary>
    public static class OmnichannelBotClient
    {
        /// <summary>
        /// Delivery mode of bot's reply activity
        /// </summary>
        private const string DeliveryMode = "deliveryMode";
        /// <summary>
```

```
        /// Delivery Mode value bridged
        /// </summary>
        private const string Bridged = "bridged";
        /// <summary>
        /// Custom data tag
        /// </summary>
        private const string Tags = "tags";

        /// <summary>
        /// Adds Omnichannel for Customer Service escalation context to the
bot's reply activity.
        /// </summary>
        /// <param name="activity">Bot's reply activity</param>
        /// <param name="contextVars">Omnichannel for Customer Service
workstream context variable value pairs</param>
        public static void AddEscalationContext(IActivity activity,
Dictionary<string, object> contextVars)
        {
            Command command = new Command
            {
                Type = CommandType.Escalate,
                Context = contextVars
            };

            string serializedString = JsonConvert.SerializeObject(command);
            if (activity.ChannelData != null)
            {
                (activity as IActivity).ChannelData[Tags] =
serializedString;
            }
            else
            {
                activity.ChannelData = new Dictionary<string, object>() { {
Tags, serializedString } };
            }
        }

        /// <summary>
        /// Adds Omnichannel end conversation context to the bot's reply
activity.
        /// </summary>
        /// <param name="activity">Bot's reply activity</param>
        public static void AddEndConversationContext(IActivity activity)
        {
            Command command = new Command
            {
                Type = CommandType.EndConversation,
                Context = new Dictionary<string, object>()
            };

            string serializedString = JsonConvert.SerializeObject(command);
            if (activity.ChannelData != null)
            {
                (activity as IActivity).ChannelData[Tags] =
serializedString;
```

```
            }
            else
            {
                activity.ChannelData = new Dictionary<string, object>() { {
Tags, serializedString } };
            }
        }

        /// <summary>
        /// Sets delivery mode for bot as bridged so that Customer can see
bot messages
        /// </summary>
        /// <param name="activity">Bot's reply activity</param>
        public static void BridgeBotMessage(IActivity activity)
        {
            if (activity.ChannelData != null)
            {
                (activity as IActivity).ChannelData[DeliveryMode] = Bridged;
            }
            else
            {
                activity.ChannelData = new Dictionary<string, object>() { {
DeliveryMode, Bridged } };
            }
        }
    }
}
```

3. Call the appropriate client method in the Bot ActivityHandler class.

   Change the `Escalate` and `EndConversation` command criteria based on your requirements.

   Add the code statement `OmnichannelBotClient.BridgeBotMessage(turnContext.Activity);` in your bot code to send messages to Omnichannel for Customer Service. This method must be called for every Activity message that's sent to the customer.

The sample code is as follows.

C#

```
using System;
using System.Collections.Generic;
using System.Threading;
using System.Threading.Tasks;
using EchoBot.OmniChannel;
using Microsoft.Bot.Schema;

namespace Microsoft.Bot.Builder.EchoBot
```

```
{
    public class EchoBot : ActivityHandler
    {
        /// <summary>
        /// This method is called when the bot receives a message.
        /// </summary>
        /// <param name="turnContext">Turn Context object</param>
        /// <param name="cancellationToken">CancellationToken</param>
        /// <returns></returns>
        protected override async Task
OnMessageActivityAsync(ITurnContext<IMessageActivity> turnContext,
CancellationToken cancellationToken)
        {
            if (turnContext.Activity.Type == ActivityTypes.Message)
            {
                // Replace with your own message
                IActivity replyActivity = MessageFactory.Text($"Echo:
{turnContext.Activity.Text}");

                // Replace with your own condition for bot escalation
                if (turnContext.Activity.Text.Equals("escalate",
StringComparison.InvariantCultureIgnoreCase))
                {
                    Dictionary<string, object> contextVars = new
Dictionary<string, object>() { { "Bo-tHandoffTopic", "CreditCard" } };
                    OmnichannelBotClient.AddEscalationContext(replyActivity,
contextVars);
                }
                // Replace with your own condition for bot end conversation
                else if (turnContext.Activity.Text.Equals("endconversation",
StringComparison.InvariantCultureIgnoreCase))
                {

OmnichannelBotClient.AddEndConversationContext(replyActivity);
                }
                // Call method BridgeBotMessage for every response that
needs to be delivered to the customer.
                else
                {
                    OmnichannelBotClient.BridgeBotMessage(replyActivity);
                }

                await turnContext.SendActivityAsync(replyActivity,
cancellationToken);
            }
        }

        /// <summary>
        /// This method is called when there is a participant added to the
chat.
        /// </summary>
        /// <param name="membersAdded">Member being added to the
chat</param>
        /// <param name="turnContext">TurnContext</param>
        /// <param name="cancellationToken">CancellationToken</param>
```

```
        /// <returns></returns>
        protected override async Task
OnMembersAddedAsync(IList<ChannelAccount> membersAdded, ITurn-
Context<IConversationUpdateActivity> turnContext, CancellationToken
cancellationToken)
        {
            foreach (var member in membersAdded)
            {
                if (member.Id != turnContext.Activity.Recipient.Id)
                {
                    //Set the bridge mode for every message that needs to be
delivered to customer

OmnichannelBotClient.BridgeBotMessage(turnContext.Activity);
                    await
turnContext.SendActivityAsync(MessageFactory.Text($"Welcome to Echo Bot."),
cancellationToken);
                }
            }
        }
    }
}
```

The dictionary `contextVars` contains all the Omnichannel for Customer Service context variable name value pairs that you want to update as part of the escalation request. Here `BotHandoffTopic` is the context variable name and **CreditCard** is the context variable value. If there's an agent queue with the rule **BotHandoffTopic** equals **CreditCar**, then this escalated chat will be routed to that queue.

The context variable name is of type String. The context variable value must be of type Integer or String, and should be passed as Dictionary<string, object> during escalation. The sample code is as follows.

C#

```
Dictionary<string, Object> keyValues = new Dictionary<string, object>() {
{ "BotHandoffTopic", "CreditCard" },
{ "IDNumber", 101}
}
```

The bot can also send an escalation summary that'll be visible only to the agent after the escalated chat request is accepted. To send the summary, set the activity text appropriately in the escalation Activity message.

See also

Integrate an Azure bot

Add context variables

Azure Bot Service

Connect a bot to channels

Bring your own custom messaging channel: Direct Line Bot

Best practices for configuring Azure and Power Virtual Agents bots

Download file attachments from an Azure bot

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Follow these steps to download attachments from an Azure bot in the Microsoft Teams channel.

1. Get the token for your bot using your bot's Microsoft App ID and client secret.
2. Get the `attachmentId` from the attachment URL.

   For example, if the URL is `https://us-api.asm.skype.com/v1/objects/0-eus-d1-5360689c55c308cb4e3b51722e46b801/`, then the `attachmentId` is `0-eus-d1-5360689c55c308cb4e3b51722e46b801`.
3. Insert the `attachmentId` in a `RequestUri` variable and then use `RequestUri` in a `GET` request, like this:

```
C#

string requestUri =
$"https://botapi.skype.com/amer/v3/attachments/{attachmentId}/views/ori
ginal";
var httpRequest = new HttpRequestMessage(HttpMethod.Get, requestUri);

var authorization = new AuthenticationHeaderValue("bearer", <add the
botToken here>);
var requestHeaders = new Dictionary<string, string>()
  {
     { "Authorization", authorization.ToString() }
  };

foreach (var header in requestHeaders)
  {
      httpRequest.Headers.Add(header.Key, header.Value);
  }

HttpResponseMessage response = await client.SendAsync(httpRequest);
```

Manage file attachments during migration

This section describes how to manage file attachments when you migrate an omnichannel implementation from the Microsoft Teams channel to the Omnichannel bot service messaging platform.

First, let's quickly review file attachment formats in the Teams bot service channel and the Omnichannel bot service channel.

File attachment formats

When file attachments are sent from Omnichannel for Customer Service to an Azure bot on the Teams bot service channel, the attachment format is passed in the `Activity.Attachments` property. The attachment's content type is "application/vnd.microsoft.teams.file.download.info".

Teams bot service channel

JSON


```
{
   "attachments":[
      {
         "contentType":" text/html",
         "contentUrl":null,
         "content ":{
            "name":null,
            "thumbnailUrl":null
         }
      },
      {
         "contentType":"application/vnd.microsoft.teams.file.download.info",
         "contentUrl":"https://us-api.asm.skype.com/v1/objects/0-wus-d8-111
a550dfI 6e947f250519ffc242763d/",
         "content":{
            "downloadUrl":"https://us-api.asm.skype.com/v1/objects/0-wus-d8-
111 a550dfI 6e947f250519ffc242763d/",
            "uniqueId":"0-wus-d8-111 a550dfI 6e947f250519ffc242763d",
            "fileType":"png "
         },
         "name":"bot.png",
         "thumbnailUrl":null
      }
   ]
}
```


However, when file attachments are sent from Omnichannel for Customer Service to the Azure bot on the Omnichannel bot service channel, the information required to

download the files is passed in the `amsReferences` and `amsMetadata` fields of the `Activity.ChannelData` property.

Omnichannel bot service channel

JSON

```
{
   "recipient":{
      "id":"8:acs:5ecf37b1-11 Oc-414g-ab33-804ffd6b4a33_eooe0010-7c57-1ceb-
nec-113aOdOOb272",
      "name":"Omnichannel-test-bot",
      "aadObjectId":null,
      "role":null
   },
   "attachments ":null,
   "channelData":{
      "tags":"Channelld-lcw,FromCustomer",
      "deliveryMode":"bridged",
      "fromUserId":"8:acs:5ecf37b1-110c-4149-ab33-804ffd6b4a33_00000010-61
b9-ab1 d-3dfe-9c3aOd009ea4",
      "amsReferences":[
         "0-wus-d6-20e7797d208fab388cc11b09674d166"
      ],
      "amsMetadata":[
         {
            "contentType":"image/png",
            "fileName":"SurnmerTime.png"
         }
      ],
      "sourceChannelId":"omnichannel"
   }
}
```

How to manage file attachments in your Azure bot code

Attachment information is passed differently in the Omnichannel bot service channel and the Teams bot service channel. To ensure smooth migration between the two chat channels, keep both the Teams channel-specific logic and the Omnichannel bot service channel-specific logic in the bot code, as shown in the following example.

C#

```
// 1. Retrieve Attachment ID from ChannelData["amsReferences"]
if (turnContext.Activity.ChannelData != null &&
    turnContext.Activity.ChannelData is JObject incomingRequestChannelData
&&
    incomingRequestChannelData.TryGetValue("amsReferences", out JToken
amsReferencesArray))
```

```
{
    string attachmentId = JsonConvert.DeserializeObject<string[]>
(amsReferencesArray.ToString()).FirstOrDefault();

    // 2. Build HTTP request for specified attachment ID.
    string requestUri =
$"https://botapi.skype.com/amer/v3/attachments/{attachmentId}/views/original
";
    var httpRequest = new HttpRequestMessage(HttpMethod.Get, requestUri);

    // 3. Acquire authentication token and add it to request headers
    var token = await new MicrosoftAppCredentials("botAppId",
"botAppSecret").GetTokenAsync();
    var authorization = new AuthenticationHeaderValue("bearer", token);
    httpRequest.Headers.Add("Authorization", authorization.ToString());

    // 4. Add Azure Communication Services Bot ID to request header. This is
required to achieve good download performance.
    httpRequest.Headers.Add("BotAcsId", turnContext.Activity.Recipient.Id);

    // 5. Use HttpClient to execute the request and download attachment
    var response = await client.SendAsync(httpRequest);

    // 6. Save HTTP response stream to the file
    var responseContentStream = await response.Content.ReadAsStreamAsync();
    using (FileStream fileCreateStream = new FileStream("file path",
FileMode.Create))
    {
        fileCreateStream.CopyTo(responseContentStream);
    }
}
else if (turnContext.Activity.Attachments != null)
{
    // 1. Retrieve Teams attachment
    var teamsAttachment =
turnContext.Activity.Attachments.FirstOrDefault(attachment =>
attachment.ContentType.Equals("application/vnd.microsoft.teams.file.download
.info", StringComparison.OrdinalIgnoreCase));

    if (teamsAttachment != null)
    {
        // 1. Retrieve Teams Attachment ID from Content["uniqueId"] field
        string attachmentId = (teamsAttachment.Content as
JObject).GetValue("uniqueId").ToString();

        // 2. Build HTTP request for specified attachment ID.
        string requestUri =
$"https://botapi.skype.com/amer/v3/attachments/{attachmentId}/views/original
";
        var httpRequest = new HttpRequestMessage(HttpMethod.Get,
requestUri);

        // 3. Acquire authentication token and add it to request headers
        var token = await new MicrosoftAppCredentials("botAppId",
"botAppSecret").GetTokenAsync();
```

```
        var authorization = new AuthenticationHeaderValue("bearer", token);

        httpRequest.Headers.Add("Authorization", authorization.ToString());

        HttpClient client = new HttpClient();
        HttpResponseMessage response = await client.SendAsync(httpRequest);
    }
}
```

See also

Card support by channel
Support for live chat and asynchronous channels
Migration changes for new omnichannel messaging platform

Get user details on Microsoft Teams from Azure bot

Article • 05/16/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

If you integrate an Azure bot with the Microsoft Teams channel in Omnichannel for Customer Service, you might want to get user details. The Azure bot needs to use the Microsoft Graph SDK to fetch the user details. More information: Get user details with Microsoft Graph

Privacy notice

You understand that your data may be transmitted and shared with external systems and that your data may flow outside of your organization's compliance boundary (even if your organization is in a Government Cloud environment). For example, your messages will be shared with the bot which could be interacting with a third-party system based on the integration done by you. For more information on how we process your data, please refer to the Microsoft Privacy Statement.

See also

Integrate an Azure bot
Enable a bot to escalate and end conversation
Context variables for a bot
Enable bot context NuGet package

Display suggested actions in a vertical layout

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Your bot can use suggested actions to present buttons or options in the chat window, which the user can tap to provide input. This way, users can answer a question or make a selection without having to use a keyboard.

Suggested actions can be displayed vertically to enhance the user experience and promote easy readability. More information: Customize a chat widget

The suggested actions feature is now supported in Microsoft Teams along with other asynchronous chat channels.

Pass authentication token to bot during single sign-on in live chat

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

With single sign-on (SSO) in Omnichannel for Customer Service, your bots can perform secure actions on behalf of the customer during an ongoing customer conversation. This provides a seamless, personalized, and secure experience for the customer, thereby improving customer satisfaction.

In the live chat channel, you can set up authentication in Azure or Power Virtual Agents bots. You can request authentication during a customer conversation before seeking or processing any confidential information such as bill payment, order returns, and any other sensitive data. As a bot author or developer, you can choose to show the OAuth card if the customer hasn't signed in or if the customer sign-in couldn't be validated. You can choose to hide the card if the customer has already signed in.

Here's how this works:

- During the live chat, your bot requests the customer for authentication before processing any sensitive or confidential information.
- You intercept the OAuth card and call your function to send the authentication token directly to the bot.
- Your function will then pass an authentication token (if found) and tell Omnichannel for Customer Service whether the OAuth or sign-in card should be displayed or not, based on the customer's sign-in status.

Prerequisites

If you're using Azure bots, ensure that you've installed the latest versions of the following two library packages:

- **Microsoft.Bot.Builder.Dialogs** This library implements the .NET Simple Dialog classes.
- **Microsoft.Bot.Builder.Integration.AspNet.Core** This library integrates the Bot Builder SDK with ASP.NET Core.

If you're using a Power Virtual Agents bot, ensure that you manually set up end user authentication for Power Virtual Agents. More information: Configure manual user authentication

Sample code

Here's a code sample that illustrates how you can pass an authentication token to an Azure or Power Virtual Agents bot during single sign-on.

JavaScript

```
const signInIds = [];
window.Microsoft.Omnichannel.LiveChatWidget.SDK.setBotAuthTokenProvider(asyn
c (botTokenUrl, callback) => {
  const urlSearchParams = new URLSearchParams(botTokenUrl);
  const signInId = urlSearchParams.get("state");

  if (signInIds.includes(signInId)) { // Ignore authenticated sign-in cards
    callback({show: false});  // Hide card
    return;
  }

  signInIds.push(signInId);

  const authUrl = ""; // Customer's Authentication API
  const authResponse = await fetch(authUrl, method: "POST"});
  const {token} = authResponse;  // Customer's Auth Token

  const data = {
    token: "token"
  };

  const payload = {
    method: "POST",
    headers: {
      "Content-Type": "application/json"
    },
    body: JSON.stringify(data)
  };

  try {
    const botAuthResponse = await fetch(botTokenUrl, payload); // Posts Auth
Token to Bot directly

    // Sign in through Bot is successful
```

```
    if (botAuthResponse.status === 200) {
      signInIds.push(signInId); // Track authenticated sign-in card
      callback({show: false}); // Hide card
    }

    if (botAuthResponse.status === 404 || botAuthResponse.status == 202) {
      callback({show: false}); // Hide card
      return;
    } else {
      // Other condition handling
    }

    return;
  } catch (error) {

  }

  callback({show: true});  // Show sign-in card by default
});
```

See also

Integrate an Azure bot
Integrate Power Virtual Agents bot
setBotAuthTokenProvider method

Customer Service Insights

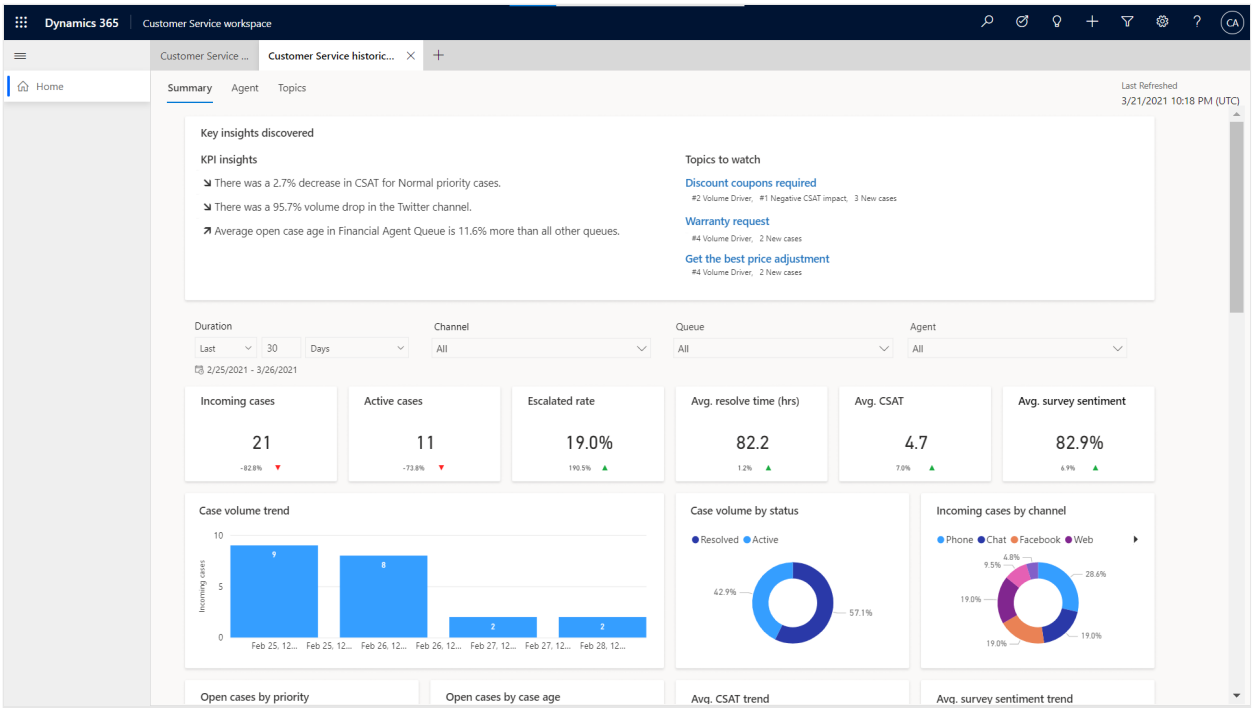
Article • 11/01/2023

> **Note**
>
> Microsoft Power BI template reports for **Customer Service Analytics dashboards** and **Omnichannel Insights** will be deprecated as of November 6, 2023. We recommend that you start using the out-of-box **Omnichannel historical analytics** and **Customer Service historical analytics**, which don't need additional Microsoft Power BI licenses. You can **visually customize** and extend these reports to add additional data sources and metrics through **data model customization**. For details on the deprecation, go to **Deprecations in Customer Service**.

Dynamics 365 Customer Service Insights helps both agents and customer service managers make better decisions and improve customer satisfaction. Agents and customer service managers can use AI and analytics capabilities for Customer Service Insights and Omnichannel for Customer Service. You can empower your teams with insights into customer satisfaction–boosting analytics and AI-powered features to spend less time searching and more time engaging with customers.

The premium AI capabilities in Customer Service Insights use advanced AI technology in natural language understanding and natural language generation to help your service team focus on what matters and guide them to success. As an agent, you can use real-time similar cases and knowledge article suggestions that are customized for the current context. The AI-driven technology allows agents to help solve customer issues more quickly, improving resolution rates, and customer satisfaction.

These capabilities are deeply embedded into the core agent and manager experiences in Customer Service and Omnichannel.



Customer Service Insights across your organization

Customer Service Insights connects with your Dynamics 365 Customer Service and Omnichannel for Customer Service data to provide your support organization with out-of-box AI and BI capabilities, such as customer service analytics, similar case suggestions and more. Different applications will surface slightly different feature sets, as detailed below.

Customer Service applications

Customer Service Insights is now embedded in Dynamics 365 Customer Service. After it is enabled, this experience allows you to start seeing historical analytics directly within the Customer Service environment. Several reports and dashboards can be viewed by your management team.

For more information on the Customer Service offerings, see the following capabilities.

- Customer Service Historical analytics
- Topic clustering for cases
- Customer Service analytics in Power BI
- Knowledge search analytics
- AI Suggestions for similar cases and knowledge articles

Omnichannel for Customer Service

Customer Service Insights for Omnichannel for Customer Service brings many of the same key operational metrics and features right into your daily contact center operations. Real-time customer sentiment analysis, combined with contextual AI suggestions of relevant cases and knowledge articles, helps agents reduce customer frustration and case resolution times. With the sentiment analysis dashboard, you can use the real-time sentiment data to gain a better understanding of how customer interactions drive KPIs and satisfaction scores.

For more information on the Omnichannel for Customer Service offerings, see the following topics.

- Analyze real-time customer sentiment
- Enable AI suggestions for similar cases and knowledge articles
- Dashboards overview

Important

If you're a customer who uses the Customer Service Insights standalone web application, your current working environments will be terminated and inaccessible by December 8, 2021. You can no longer use the standalone service after this date. The embedded Customer Service Insights features in the core applications will continue to be available and supported. For users who hold Customer Service Enterprise licenses, you can no longer create new workspaces, but you'll retain access to existing ones. Meanwhile, the standalone app guide contains documentation for the web application.

See also

Configure Customer Service analytics and insights
Configure Customer Service Analytics dashboards in Power BI
Send a survey automatically when case is resolved
Configure Omnichannel historical analytics
Configure AI topic clustering for conversation

Supported regions and languages, and service limits for analytics and insights

Article • 10/09/2023

Depending on your location, certain features are available for in Dynamics 365 Customer Service insights. Service limits also apply.

Prerequisites

The AI Builder preview models setting should be enabled in Power Platform Admin Center.

Region availability of analytics and insights

The following features are available in all geographic locations where the voice channel in Omnichannel for Customer Service is supported:

- Call transcription
- Call insights

Geographic support for real-time message translation is dependent on your translator service.

The following table lists the region availability of analytics and insights.

> **Note**
>
> The features listed in the table aren't available in South Africa, Korea, and Norway.

Feature	North America	Europe	Asia Pacific	South America	Australia	Japan	China	India	Canada	United Kingdom	France	United Arab Emirates	Switzerland	Germany
Copilot—Summarize cases[1]	✓	✓	✓	✓	✓	✓	✕	✓	✓	✓	✓	✓	✓	✓
Copilot—Summarize conversations[1]	✓	✓	✓	✓	✓	✓	✕	✓	✓	✓	✓	✓	✓	✓
Copilot—Ask a question[1]	✓	✓	✓	✓	✓	✓	✕	✓	✓	✓	✓	✓	✓	✓
Copilot—Draft a chat response[1]	✓	✓	✕	✕	✕	✕	✕	✕	✕	✓	✕	✕	✕	✕
Copilot—Draft emails[1]	✓	✓	✓	✓	✓	✓	✕	✓	✓	✓	✓	✓	✓	✓
Customer Service historical analytics	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Case topic clustering	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Omnichannel historical analytics	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Conversation topic clustering	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Omnichannel historical analytics - Voice	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Feature	North America	Europe	Asia Pacific	South America	Australia	Japan	China	India	Canada	United Kingdom	France	United Arab Emirates	Switzerland	Germany
Sentiment analysis	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
AI suggestions for cases and knowledge articles	✓	✓	✓	✓	✓	✓	✕	✓	✓	✓	✓	✓	✓	✕
Intelligent skill finder for unified routing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Sentiment prediction-based routing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Effort estimation model for unified routing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
AI suggestions for contacts in Microsoft Teams	✓	✓	✓	✓	✓	✓	✕	✓	✓	✓	✓	✓	✓	✕
AI generated summary for contacts in Microsoft Teams	✓	✓	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕
Forecast report for agents, cases, and conversations	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Knowledge Base keywords suggestion	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Unified routing analytics	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✕

✓: Available
✕: Not available

[1] By default, the copilot features are available in the North America region only. Customers with environments outside the United States can use the copilot features by opting in to data movement across geographical (data) boundaries to share relevant data outside their region for processing.

Language support for AI-based analytics and insights in Customer Service

The following features support all languages that the product supports.

- Sentiment prediction-based routing
- Sentiment analysis
- Call transcription
- Call insights

Language availability for real-time message translation is dependent on your translator service provider.

The following table lists the language availability of the other Customer Service Insights features.

Feature name	English	Arabic	Dutch	French	German	Italian	Japanese	Portuguese	Simplified Chinese	Spanish
Copilot	✓	✕	✕	✕	✕	✕	✕	✕	✕	✕
Intelligent skill finder for unified routing	✓	✕	✕	✓	✓	✓	✓	✕	✕	✓
Effort estimation model for routing	✓	✓	✓	✓	✓	✓	✓	✕	✕	✓
AI suggestions for cases and knowledge articles	✓	✕	✓	✓	✓	✓	✓	✕	✕	✓
AI suggestions for contacts in Microsoft Teams	✓	✕	✓	✓	✓	✓	✓	✕	✕	✓
AI topic discovery	✓	✕	✕	✓	✓	✓	✓	✓	✕	✓
AI suggestions for article keywords and description	✓	✕	✓	✓	✓	✓	✓	✕	✕	✓
AI generated summary for contacts in Microsoft Teams	✓	✕	✕	✕	✕	✕	✕	✕	✕	✕

✓ : Available
✕ : Not available

Service limits for analytics and insights

The built-in limits are designed to ensure reliability and stability of the service. Use the Ideas forum to request changes.

The following table lists the built-in limits for the embedded version of insights that can be accessed through the Customer Service Hub, Customer Service workspace, and Omnichannel for Customer Service apps.

Area	Limits	Notes
Data age limit	24-month period	Reports are limited to case data from the past 24 months.
Dashboard interaction	No limit	No limits on the number of interactions or drill-throughs within reports.
Topics	At least three related cases	Topics require at least three semantically related cases for the model to generate topics.
Topics refresh	100k per run	Refresh of topics uses up to 100,000 cases or conversations per run.
Data refresh	Once every 24 hours	Data refresh occurs automatically each day, starting at midnight UTC. The time when the refresh completes isn't guaranteed. More information: Dashboard overview.
AI suggestions for active cases	Each user license adds 30 active cases where agents can get AI suggested knowledge articles and similar cases in real time.	
AI suggestions for conversations	150 conversations per month per user license	Each user license adds 150 Omnichannel conversations where agents can get AI suggested knowledge articles and similar cases in real time.

Service protection limits for AI suggestions

AI suggestions for case and knowledge was introduced in October 2020 with service protection limits on these capabilities to maintain a consistent quality of service for all our customers. However, there aren't penalties if customers exceed predefined limits. Over time, Microsoft might adjust these limits in keeping with customer usage patterns. Microsoft provides options for customers with high usage scenarios and patterns to purchase more capacity in a manner that's minimally disruptive.

For information on the service protection limits for AI suggestions, see Enable AI suggestions for similar cases and knowledge articles. The total limits are pooled at the tenant level based on the number of Customer Service Enterprise user licenses that are available in the tenant.

Microsoft Power Platform capacity impact

Enabling the insights feature affects Dataverse entitlements. For more information, see New Microsoft Dataverse storage capacity

See also

Introduction to Customer Service Insights
Copilot data movement across geographies
Set up intelligent skill finder model
Before you build a category classification model - AI Builder
Enable AI suggestions for similar cases and knowledge articles
Configure AI suggestions for contacts in Microsoft Teams
Configure AI topic clustering for conversations
Configure AI suggestions for article keywords and description

Configure analytics and insights dashboards

Article • 07/28/2023

You can enable and configure the Customer Service Insights features and services and share them with service managers, who can then view and analyze different activities. You can configure the features and services in Customer Service admin center app, and they can be viewed on both the Customer Service Hub and Customer Service workspace apps.

> **Note**
>
> Settings for the Power BI template applications are separate from these services.

Configuration details

See the following articles for configuring analytics and insights:

- Configure Customer Service historical analytics
- Configure Omnichannel historical analytics
- Configure AI topic clustering for cases
- Configure Omnichannel real-time analytics
- Configure Knowledge search insights
- Configure intraday insights

Configure user access to analytics and dashboards

Users with the system administrator or supervisor role can access the analytics and dashboards. To grant other users access to analytics and dashboards, go the Power Platform admin center and perform the following steps:

1. Open the Power Platform admin center and select your environment.
2. In the **Access** section, under **Security roles**, select **See all**. A list of security roles available in the environment is displayed.
3. To add privileges to an existing role, select a role from the list of security roles, and then select **Edit** on the navigation bar.

If you'd like to create a new role for analytics users, then perform the following steps:

a. Select **New role** on the navigation bar. The **New Security role** dialog opens.
b. On the **Details** tab, enter a name in the **Role Name** field.

4. Select the **Custom Entities** tab, move through the list of analytics reports, and then grant **Read** privileges for the following:

   - Omnichannel historical analytics dashboards
   - Omnichannel real-time analytics dashboards
   - Customer Service historical analytics dashboards
   - Knowledge analytics dashboards
   - Report Bookmarks

   > **Note**
   >
   > For custom roles, select **Read** privileges for **the entities used by historical and real-time analytics**, as applicable.

5. Select **Save and close**.

6. On the **Security roles** page, select the role that you just created or updated, and then select **Add people** to add users to the role.

> **Note**
>
> - To bookmark a report, grant **Create**, **Read**, **Write**, and **Delete** privileges to the security roles as applicable, for the **Report Bookmark** custom entity.
> - To edit analytics reports, grant the **Analytics Report Author** role. For information about assigning user roles, go to **Assign roles to users**.

See also

Create or edit a security role to manage user access
Introduction to Customer Service analytics and insights
View and understand Customer Service analytics and insights in Customer Service Hub
View and understand Customer Service analytics
Manage report bookmarks

Manage real-time analytics reports in Omnichannel for Customer Service

Article • 05/05/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Important

This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

Note

Any visual customizations that you might have made on the preview version will be overwritten when your organization gets upgraded to the latest generally available version. Future updates to the data model will be backward compatible and visual customizations will be retained. More information: **Future data model updates**

You can configure real-time analytics in Omnichannel for Customer Service and give your supervisors access to real-time metrics and KPIs that reflect the situation in the

contact center as they oversee agents who handle customer conversations that come through multiple channels.

The following real-time analytics reports are available:

- Summary
- Voice
- Agents
- Ongoing conversation

Omnichannel real-time analytics reports aren't enabled by default. Once you enable these reports, they're enabled by default for the System Administrator, Omnichannel Administrator, Omnichannel Supervisor, Analytics Reports author, and CSR manager roles. To configure user roles to access analytics and dashboards, see Configure user access to analytics and dashboards.

Manage Omnichannel real-time analytics reports

Use the Customer Service admin center app to enable or disable Omnichannel real-time analytics reports.

1. Sign in to Dynamics 365, and on the apps page, select Customer Service admin center.

   > **Note**
   >
   > The Customer Service admin center app is automatically installed in all the Customer Service organizations. More information: **Get started with Customer Service admin center**

2. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
3. On the **Insights** page, **Report Settings** section, go to **Real-time Analytics**, and select **Manage**.
4. On the **Real-time analytics** page, turn on the **Enable Omnichannel real-time analytics** toggle.
5. In the **Additional options** section, select the **Add real-time analytics for Omnichannel voice** option. This option is available only if your organization has the voice feature configured.

View Omnichannel real-time analytics reports

To view the reports in Customer Service workspace, see Access reports.

If you've customized the Customer Service workspace, you need to perform the following steps to be able to view the reports.

1. Go to make.powerapps.com.
2. Select **Apps**.
3. Select **Customer Service workspace** and then select **Edit**.
4. On **Pages**, select **New**.
5. On the **New page** dialog, select **URL** and then select **Next**. Fill in the following information:
   a. **URL**: **/main.aspx?pagetype=control&controlName=MscrmControls.Analytics.ReportingControl&data={"featureIds":"e67a1ada-6c62-4b45-b758-0b246f32c1a5"}**
   b. **Title**: Omnichannel real-time analytics (or any other sub area title you would want to add).
6. Select **Add**.
7. Optionally, on the **Omnichannel real-time analytics** pane, on the **Icon** dropdown list, select **Use web resource**.
8. On the **Select web resource image** dialog, search and select the **msdyn_/Analytics/imgs/RealtimeReportIcon.svg** display name, and then select **Apply**. The **Omnichannel real-time analytics** page gets displayed on Customer Service workspace.
9. Select **Save**, and then select **Publish**.

See also

Overview of Omnichannel real-time analytics reports
View and understand the Summary report in Omnichannel real-time analytics
View and understand the Voice report in Omnichannel real-time analytics
View and understand the Agents report in Omnichannel real-time analytics
View and understand the Ongoing Conversation report in Omnichannel real-time analytics
Use Omnichannel for Customer Service metrics Configure user security to resources in an environment
How access to a record is determined

Manage access to Ongoing Conversations dashboard

Article • 06/02/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

To access the **Omnichannel Ongoing Conversations** dashboard, you must assign **Omnichannel supervisor** role to the users. To learn more, see Assign roles and enable users for Omnichannel for Customer Service.

Once the users get access, the **Omnichannel Ongoing Conversations** dashboard is available on **Unified Service Desk** and **Omnichannel for Customer Service** app on web.

For **Unified Service Desk**, you must add users to supervisor configuration for the dashboard to be available in the home session app tab. To learn more, see Add users to supervisor configuration.

See also

View and understand Omnichannel Ongoing Conversations dashboard.

Configure intraday insights for supervisors

Article • 08/31/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Important

Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

Note

Intraday insights reports for Omnichannel for Customer Service are deprecated as of May 1, 2023. We recommend that you use **real-time analytics reports**, our latest analytics capability, which provide real-time information about the health and key performance indicators of your organization. For more information on the deprecation, go to **Intraday insights for Omnichannel for customer service are deprecated**.

Important

This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the

feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

Supervisors have a dual responsibility with respect to agents and customers. They monitor and manage agents and make sure they remain highly productive. At the same time, they help provide a superior experience for customers. To help supervisors carry out this dual responsibility, the insights consist of intraday health tracking of agent productivity and performance.

You can customize intraday insights if you use Power BI or Power BI Premium licenses. You can't customize insights in a pre-configured Power BI workspace that doesn't have a Power BI license.

> **Note**
>
> The pre-configured Power BI workspace version of intraday insights is only available for organizations that are provisioned in a public cloud and isn't available in Government Community Cloud (GCC) and Unified Service Desk.

As an administrator, you must configure intraday insights before supervisors can use it. To configure intraday insights for your organization, follow the scenario that is applicable for your environment.

Provisioning scenario	Need to customize intraday insights?	Details
New organization created in August 2020 or later	No	Intraday insights is preconfigured and non-customizable by default. For more information, see Intraday insights in a preconfigured Power BI workspace.
Existing organization with customized intraday insights	Yes	No further action needed.
Existing organization with customized reports wanting to switch to preconfigured Power BI workspace version	No	Convert your reports to a non-customized version of intraday insights by following the steps in Intraday insights in a preconfigured Power BI workspace.
Existing or new organization with need for customized intraday	Yes	Follow the steps in Configure customized intraday insights reports.

Provisioning scenario	Need to customize intraday insights?	Details
insights		

Intraday insights in a preconfigured Power BI workspace

As an administrator for a new organization, intraday insights is configured by default, so you don't need to take extra steps to configure it, but if you want to switch from using customized reports to using the preconfigured Power BI workspace, follow the steps in this section. The preconfigured Power BI workspace feature allows you to access intraday insights without customizing the reports.

For supervisor users in your organization to access the report and dashboard, ensure the Omnichannel supervisor role is assigned. More information: Enable users for Omnichannel for Customer Service

To enable the preconfigured Power BI workspace:

1. In the site map of Omnichannel admin center, select **Supervisor settings** under **Advanced settings**, and then select **Manage** for **Intraday insights**. If you're using the Omnichannel Administration app, from the site map , select **Supervisor Experience** > **Intraday Insights**.

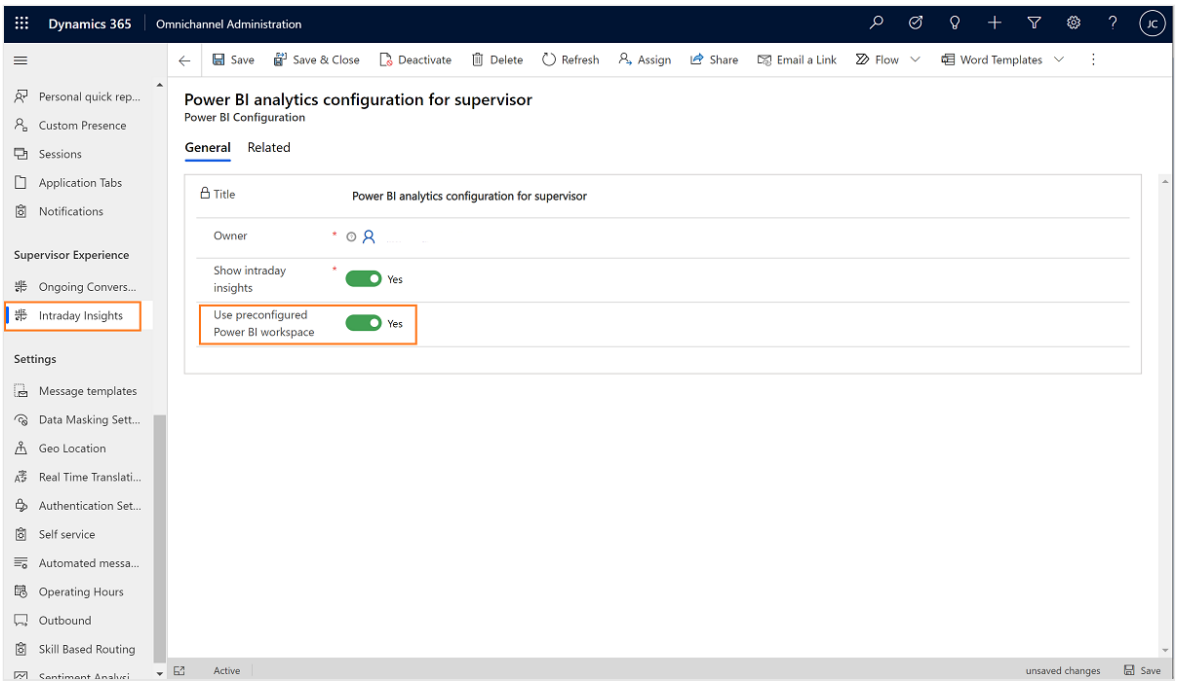
   The Power BI configuration view opens.

   > **ⓘ Important**
   >
   > Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

2. Select **New**.

   The **Power BI Configuration** form opens, where you can verify that **Use preconfigured Power BI workspace** is enabled or you can toggle it to **Yes** to

enable it.



3. Save and close the page.

Configure customized intraday insights reports

As an administrator, if you want to customize the intraday insights reports for your organization, you can configure the insights for the **Omnichannel for Customer Service** app on the web and for **Unified Service Desk**.

Prerequisites

Review the following prerequisites before configuring the supervisor insights:

- You have administrative privileges for Dynamics 365 Customer Service and Power BI.
- You have a **Power BI Pro** or **Power BI Premium** license for all supervisors and administrators.
- As a system administrator, allow the **Omnichannel for Customer Service** app to read and write data on behalf of users in your organization. More information: Provide data access consent
- The Omnichannel supervisor role has been assigned to supervisor users in your organization to access the report and dashboard. More information: Enable users for Omnichannel for Customer Service

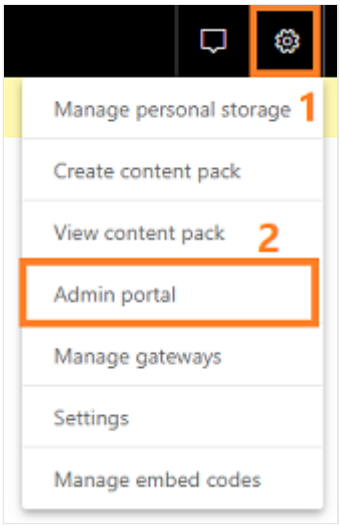
- As a system administrator, you must create and add a security group for Power BI service. Follow these steps to create and add a security group:

    1. Create a security group in Microsoft Entra ID, and add **Omnichannel for Customer Service** as a member to that security group. For GCC, you must add only **Omnichannel Engagement Hub - GCC** as a member.

        More information: Create a basic group and add members using Microsoft Entra ID

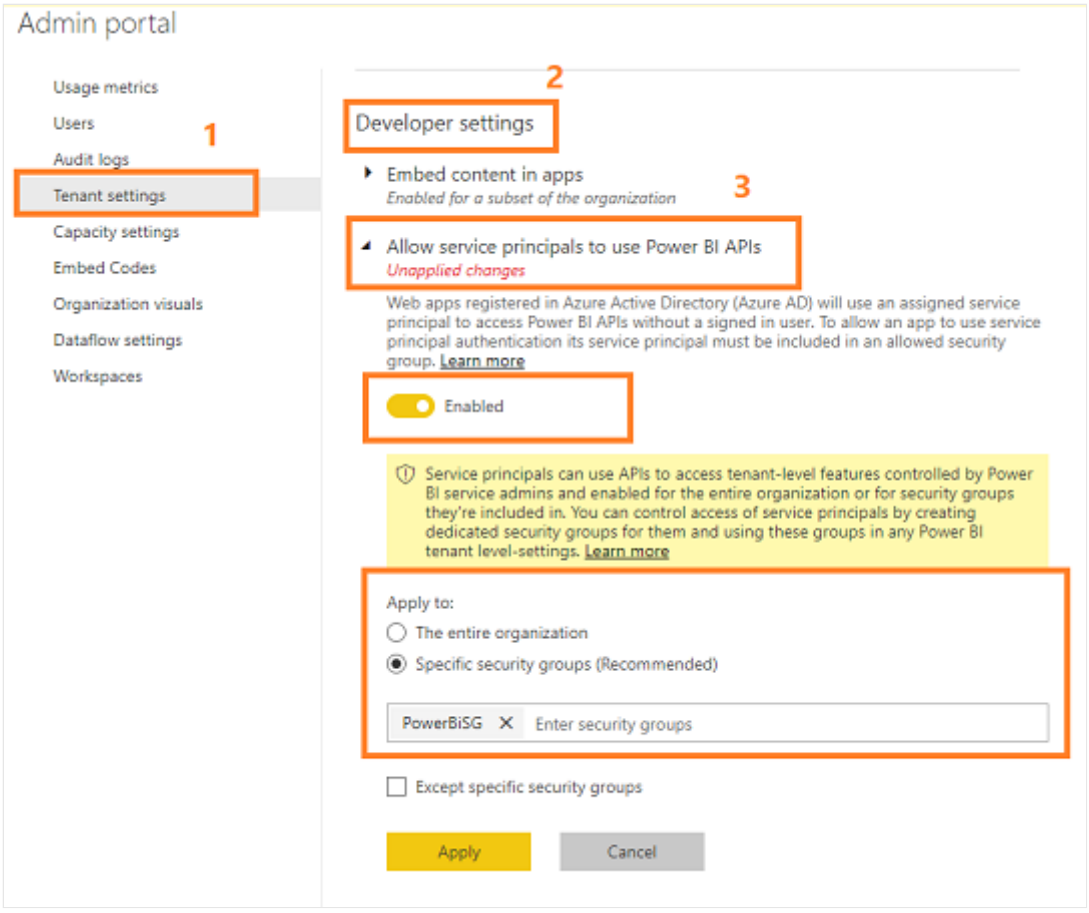
    2. As a Power BI admin, enable the service principal in the **Developer settings** in the Power BI admin portal and the security group that you created in Microsoft Entra ID.

        a. Sign in to Power BI service and go to **Settings** > **Admin portal**.

        b. In the admin portal, go to **Tenant settings** > **Developer settings** > **Allow service principals to use Power BI APIs**.

        c. Enable **Allow service principals to use Power BI APIs** and specify the security group to which you want to give access.



d. Select **Apply**.

Configure intraday insights for Omnichannel for Customer Service

Follow these steps to configure intraday insights for the Omnichannel for Customer Service app on the web:

1. Configure Power BI workspace
2. Share workspace and reports with supervisors

Configure the Power BI workspace

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

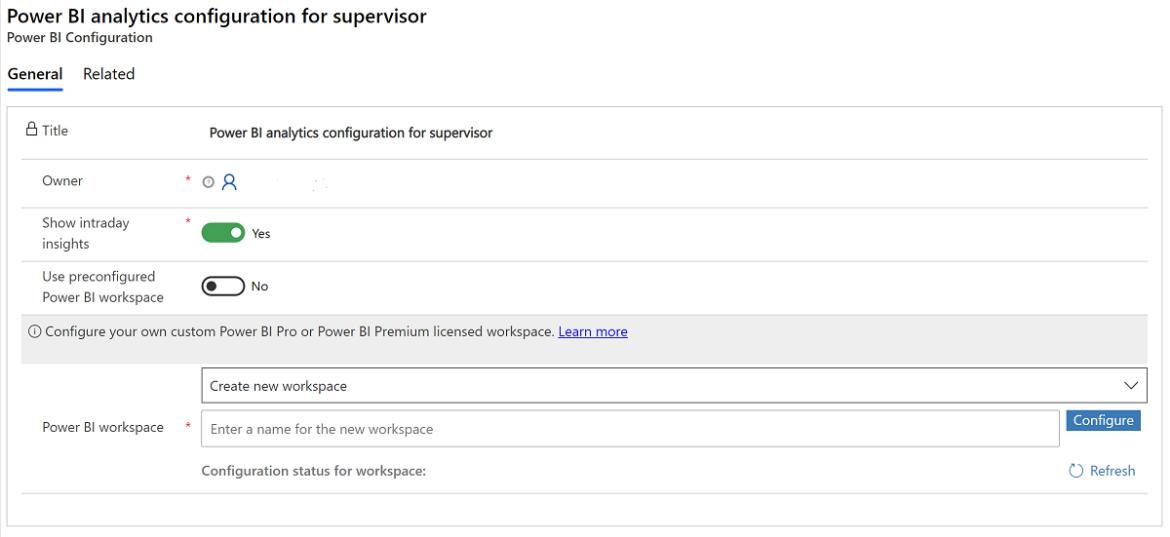
You must configure the Power BI workspace using the Omnichannel admin center or Omnichannel Administration app to create datasets and reports in Power BI. When configured, the supervisor users in your organization can see the Intraday insights reports as an app tab. Follow these steps to configure the Power BI workspace to display Intraday insights reports as an app tab in the **Omnichannel for Customer Service** app on the web.

1. In the site map of Omnichannel admin center, select **Supervisor settings** under **Advanced settings**, and then select **Manage** for **Intraday insights**. If you're using the Omnichannel Administration app, from the **Site Map** ☰, select **Supervisor Experience** > **Intraday Insights**.

   The Power BI configuration view opens.

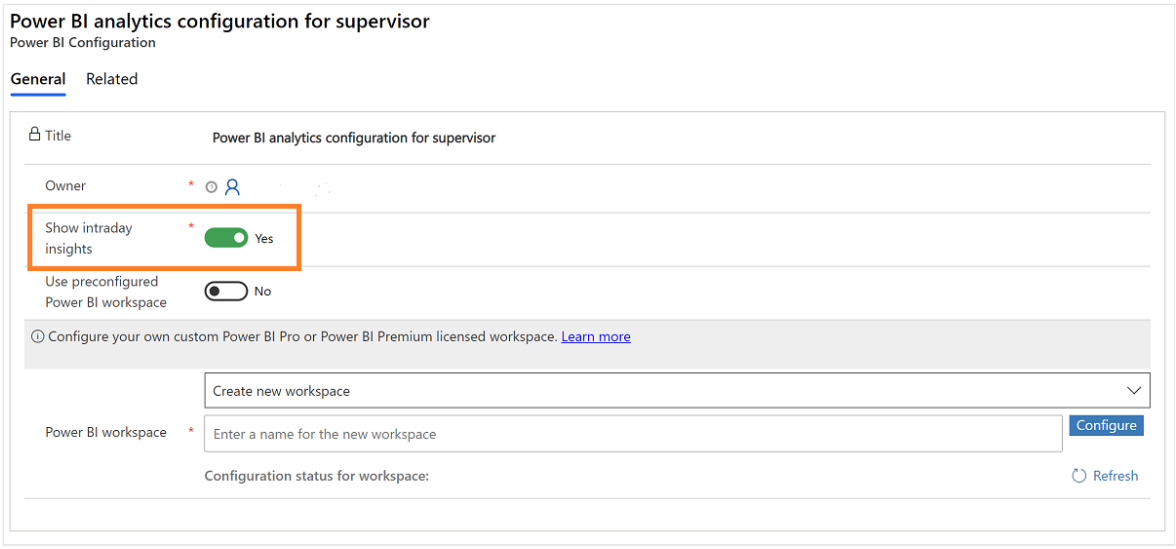
2. Select **New**.

   The **Power BI Configuration** form opens.

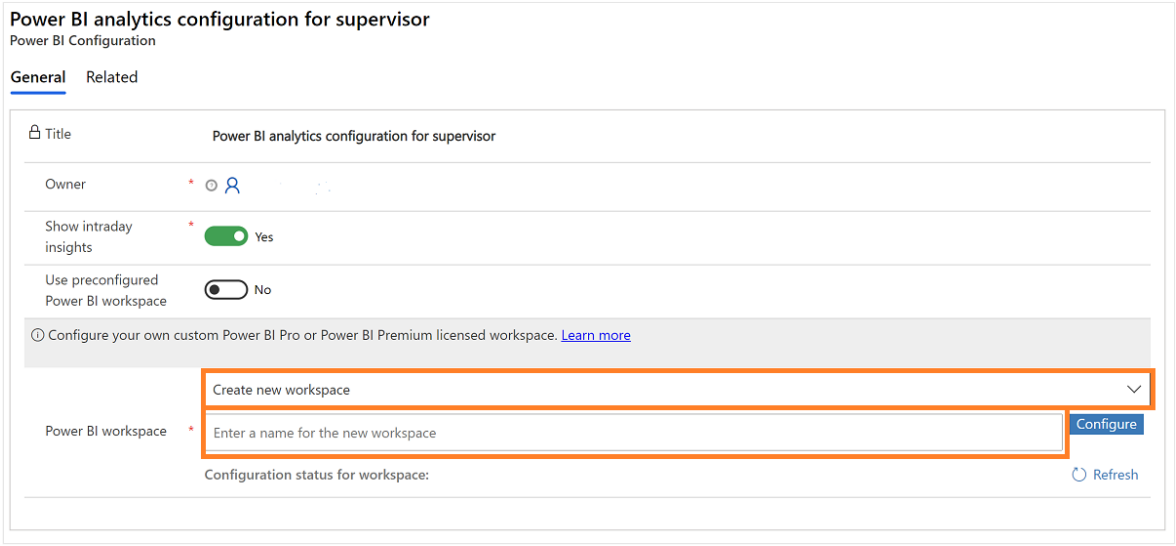


3. Set the **Show intraday insights** toggle to **Yes** to make intraday insights an app tab on the home session for supervisors.

4. For **Use preconfigured Power BI workspace**, set the toggle to **No**.

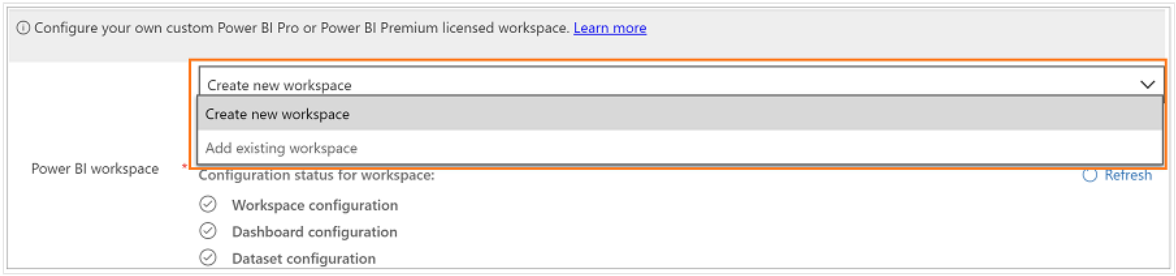


5. In the **Power BI workspace** section, select **Create new workspace** and enter a name for the workspace in **Power BI workspace** (this name must be unique).



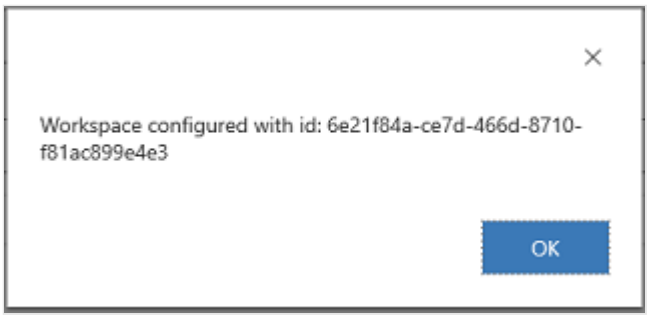
-OR-

If you want to add an existing Power BI workspace, select **Add existing workspace** and the existing workspaces are listed. Select the workspace that you want to add.



> **Note**
>
> We recommend that you configure separate workspaces for your test and production environments.

6. Select **Configure**. The workspace creation takes a few seconds and then a confirmation message is displayed with the generated workspace ID.



   In Power BI, a workspace is created.

7. Save and close the configuration.

   After you save the configuration, it might take up to 15 minutes for the datasets, dashboard, and reports to appear in your created workspace.

   > **Note**
   >
   > You can also see the status of different configuration stages such as workspace, dashboard, and datasets. When a workspace is created successfully, all the statuses will have a green check. If failed, the respective configuration stage check will be red, and an error message is displayed. Resolve the error and create the workspace again.

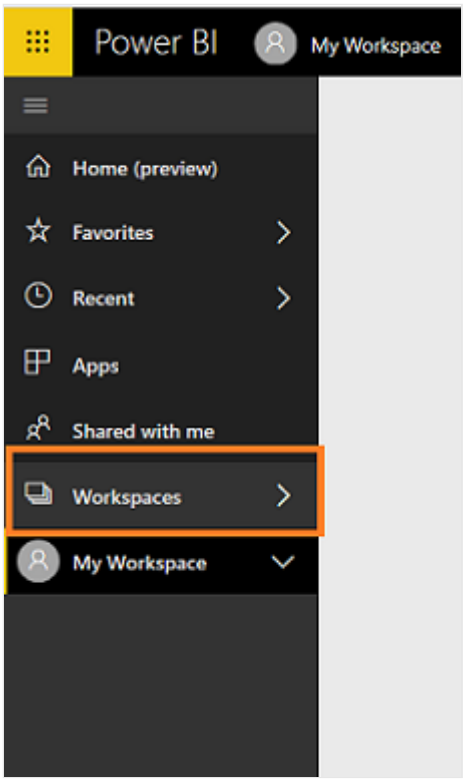
8. In Power BI Service, share the reports with supervisor users to access the report in the **Omnichannel for Customer Service** app on the web. More information: Share Power BI dashboards and reports with coworkers and others

   > **Important**
   >
   > - You can configure only one record in the **Omnichannel Administration** app.
   > - If you want to create a new configuration, deactivate and delete the existing configuration.
   > - You can edit an existing configuration to update the Power BI workspace details.

Share workspace and reports with supervisors

1. Sign in to Power BI Service.

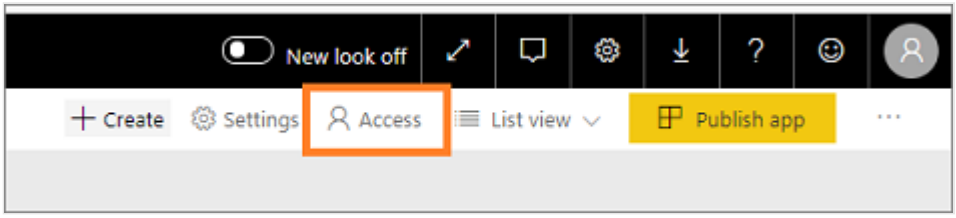
2. Go to **Workspaces** and verify that a workspace with the name that you have entered is created.



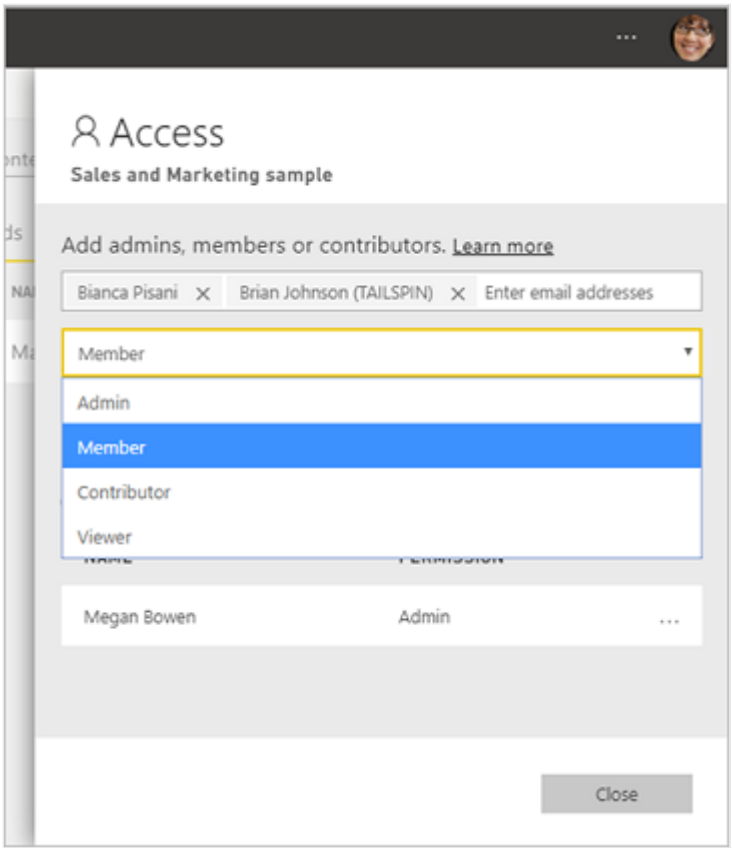
3. Open the workspace that you have created and verify that the following are available:

   - An empty dashboard with the name of the workspace.
   - The report and datasets **Intraday Monitoring**.

4. Select **Access**.



5. Add email address of the security groups, distribution lists, Microsoft 365 groups, or individuals to these workspaces as viewers, members, contributors, or admins.



6. Select **Add** > **Close**.

7. Select the report and share with supervisor users to access the report as an app tab in the **Omnichannel for Customer Service** app on the web. More information: Share Power BI dashboards and reports with coworkers and others

Configure customized intraday insights for Unified Service Desk

Before you configure the Intraday insights for Unified Service Desk, you must configure Intraday insights for the Omnichannel for Customer Service app on the web. This configures the Power BI datasets, reports, and dashboards for Omnichannel for Customer Service and enables you to configure the insights for Unified Service Desk.

> **Note**
>
> Supervisor and agent sentiment notifications are not available in Omnichannel for Customer Service on Unified Service Desk.

Configure dashboard in Power BI

Configuring the Power BI workspace provides you only the **Intraday Monitoring** report. Create the dashboard out of the **Intraday Monitoring** Power BI report after it is

available.

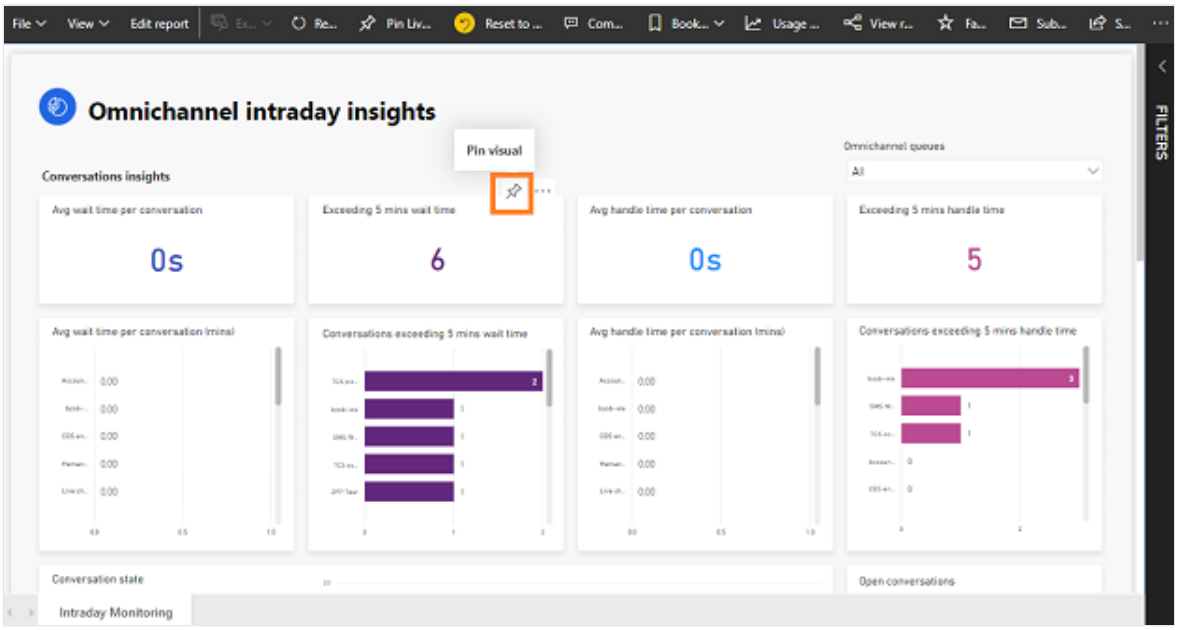
> **Important**
>
> In Power BI settings for **Intraday Monitoring**, DO NOT select the option **Take over**. If you select this option, the dataset will not connect to the datasource and you will have to reconfigure Intraday insights.

Follow these steps to configure Power BI dashboards:

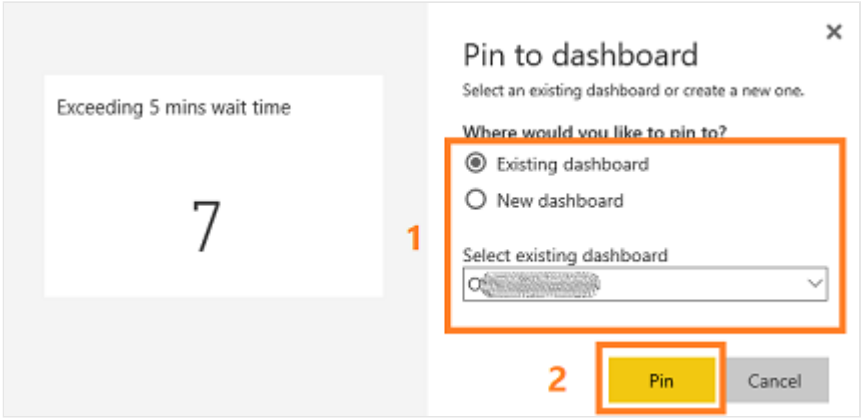
1. In Power BI Service, open the reports that are available in the workspace. More information: Open a report in Power BI service

2. Pin the required tiles to dashboards.

   The following screenshot shows how to pin a visual to the dashboard.



   Choose the dashboard to which you want to pin and select **Pin**. The report is pinned to the chosen dashboard.



More information: Pin a tile to a Power BI dashboard from a report

3. Select **Set as featured** so the created dashboard will display at the top each time you open the Power BI service.

4. Share the dashboard and reports with supervisor users. This allows supervisors to access the dashboards. More information: Share Power BI dashboards and reports with coworkers and others

5. For Unified Service Desk configuration, copy the URL of the dashboard.

   The dashboard is ready, and you can configure the **Unified Service Desk** to make this dashboard available for supervisors.

Configure Unified Service Desk to display Intraday insights

You must configure **Unified Service Desk** to display the supervisor Intraday insights when a supervisor signs in to the workspace in Omnichannel. To configure **Unified Service Desk**, follow these steps:

1. Sign in to **Dynamics 365 Customer Service** and go to **Settings** > **Unified Service Desk**.

   The Unified Service Desk settings page opens.

2. Select **Action Calls** and open **Load Supervisor Dashboard**.

3. In the **Action** section, enter the **Data** as `url= https://powerbi.com/dashboards/<id>;` that you copied in Configure dashboard in Power BI. Also, add the parameters **chromeless=1** and **nosignupcheck=1** at the end of the URL.

   For example:

   url=`https://powerbi.com/dashboards/g12466b5-a452-4e55-8634-xxxxxxxxxxxx?chromeless=1&nosignupcheck=1`

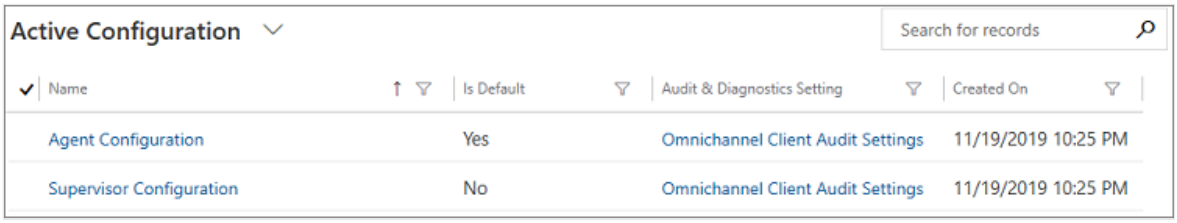
4. Save and close the settings page.

The supervisor insights is configured and available. Add users to the supervisor configuration to view the dashboards when signing on to Omnichannel in **Unified Service Desk**.

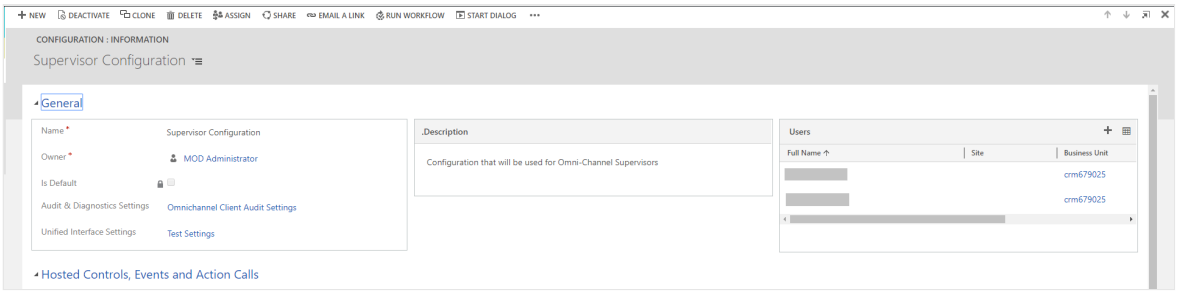
Add users to supervisor configuration

You must add users in the supervisor configuration to access any supervisor insights in **Unified Service Desk**. To add users in supervisor configuration, follow these steps:

1. Sign in to Dynamics 365 Customer Service.
2. Go to **Settings** > **Unified Service Desk** and then select **Configuration**.
3. On the configuration page, select **Supervisor Configuration**.



4. On the **Users** section, select **+ Add User record** and enter the user name to add the user.



5. Save and close the configuration.

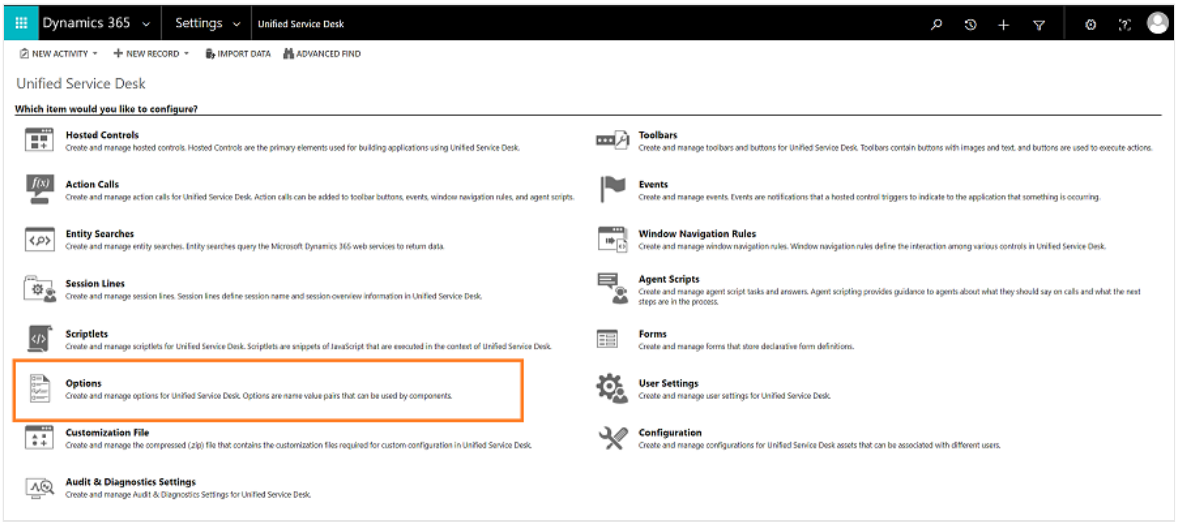
   Users are added to the supervisor dashboard and when they sign in to Omnichannel on Unified Service Desk, the supervisor dashboard tabs are available.

Update client cache version

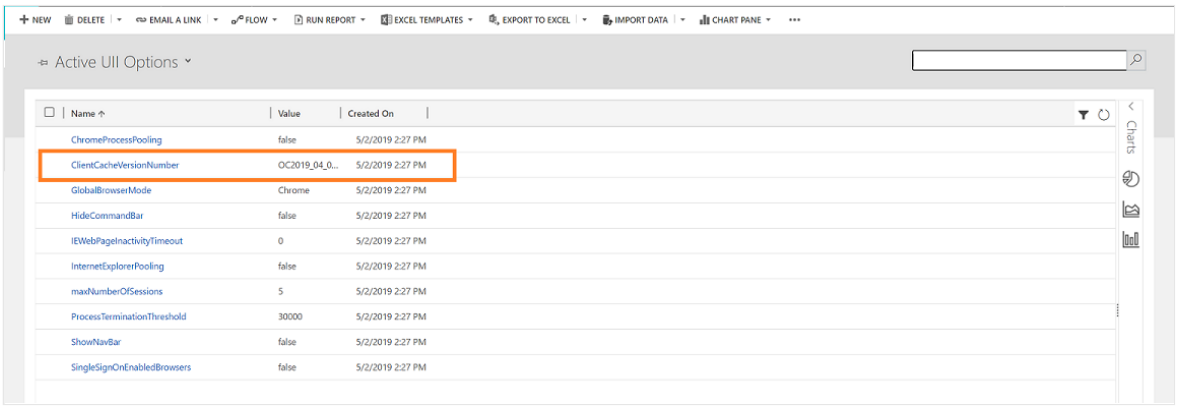
Update the client cache version number to reduce the amount of bandwidth required at the startup of the Unified Service Desk client on the computers of agents, and over the lifecycle of the client application.

More information: Client caching overview

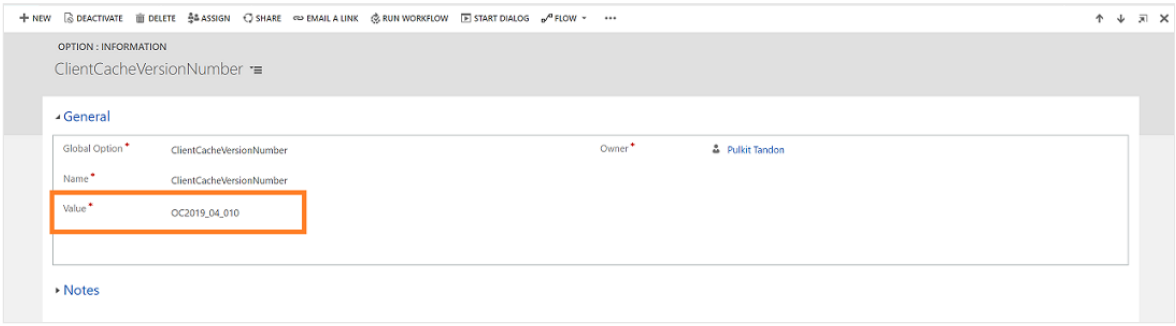
1. Sign in to **Dynamics 365 Customer Service**.
2. Go to **Settings** > **Unified Service Desk** and then select **Options**.



3. Select **ClientCacheVersionNumber**.



4. In the **Value** box, update the existing alphanumeric number. For example, if the existing alphanumeric number is OC2019_04_010, update it to OC2019_04_011.



5. Select **Save**.

See also

Introduction to intraday insights

Customize KPIs for intraday insights

Enable supervisor access to manage conversations

Article • 10/20/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

As an administrator, you can enable your supervisors to take specific actions on various conversations being handled by their agents in Omnichannel for Customer Service. You can grant your supervisors permissions to monitor, assign, transfer, and forcibly end conversations by enabling the respective permissions in the admin app.

Configure supervisor settings

1. Go to one of the admin apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Ongoing conversation insights** section, select **Manage**.

   The **Omnichannel Configuration.Supervisor Settings** page is displayed.

2. To enable the supervisors to perform the following actions, set the corresponding toggles to **Yes**:

   - **Supervisor Monitor**: Monitor how conversations are happening or being handled by their agents.
   - **Supervisor Assign**: Assign conversations to agents.
   - **Supervisor Transfer**: Transfer conversations from one agent to another.
   - **Force Close**: End voice calls and conversations that take place on the voice and messaging channels. More information: Monitor, assign, transfer, and forcibly end conversations

3. To disable any of the settings, set the corresponding toggle to **No**.

See also

Monitor, assign, transfer, and close conversations
Provide access to Ongoing Conversations dashboard

Manage historical analytics reports in Customer Service

Article • 06/23/2023

You can configure Customer Service historical analytics to give your service managers a combination of BI analytics and AI insights for their organization. The reports use natural language understanding to automatically detect the language used in your support cases and group related support cases into topics.

By default, the Customer Service historical analytics reports are enabled for the System Administrator and CSR Manager roles. To configure other user roles to access analytics and dashboards, see Configure user access to analytics and dashboards.

The historical reports include:

- Summary report
- Agent report
- Topics report
- Unified routing

After you enable the reports, you can access them in one of the following ways:

- In Customer Service workspace, select the hamburger menu, and then select **Customer Service historical analytics** in the site map.
- In Customer Service Hub, in **Service**, in the site map, select **Customer Service historical analytics**.

Manage Customer Service historical analytics reports

Use the Customer Service admin center or Customer Service Hub app to enable or disable the reports.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.

b. For **Customer Service historical analytics**, select **Manage**.

c. On the **Customer Service historical analytics** page, set the **Enable Customer Service historical analytics report** toggle to **On** to enable the reports or set the toggle to **Off** to disable the reports.

2. Select **Save** or **Save and Close**.

   This configuration will also enable AI-discovered topics from cases with default settings.

Enable historical analytics for unified routing

Use the Customer Service admin center or Customer Service Hub app to enable or disable the reports. The metrics will be available in the report after 24 hours.

> **ⓘ Important**
>
> Unified routing must be enabled to enable historical analytics for unified routing. More information: **Provision unified routing for Customer Service**

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.

   b. For **Customer Service historical analytics**, select **Manage**. The **Customer Service historical analytics** page is displayed.

   c. Select the **Add historical analytics for unified routing** check box.

2. Select **Save and Close**.

Enable historical analytics for Copilot (preview)

[This section is prerelease documentation and is subject to change.]

> **ⓘ Important**

- This is a preview feature.
- Preview features aren’t meant for production use and may have restricted functionality. These features are available before an official release so that customers can get early access and provide feedback.

Customer Service historical analytics must be enabled and you must opt in to the Copilot help pane and Copilot summaries to turn on analytics for Copilot.

1. In the Customer Service admin center, go to Insights, and on the page that appears, select **Manage** for **Customer Service historical analytics**.

2. On the **Customer Service historical analytics** page, select the **Add historical analytics for Copilot (Preview)** checkbox, and then save the changes.

You'll see a message on the command bar that your reports are being provisioned and it might take up to 24 hours for the process to complete.

See also

Introduction to Customer Service analytics and insights
Dashboard overview
Knowledge search analytics
Historical analytics for unified routing in Customer Service
View analytics for Copilot impact
Configure user security to resources in an environment
How access to a record is determined

Manage historical analytics reports in Omnichannel for Customer Service

Article • 02/02/2023

You can configure Omnichannel historical analytics to give your service managers a combination of BI analytics and AI insights for their organization. The reports use natural language understanding to automatically detect the language used in your support conversations and to group related conversations into topics.

By default, the Omnichannel historical analytics reports are enabled for the System Administrator, Omnichannel Administrator, Omnichannel Supervisor, and CSR Manager roles. To configure other user roles to access analytics and dashboards, see Configure user access to analytics and dashboards.

The historical analytics reports include:

- Summary
- Conversation
- Queue
- Voice
- Voicemail
- Agent
- Bot
- Conversation Topics
- Unified routing

Manage Omnichannel historical analytics reports

Use the Customer Service admin center or Customer Service Hub app to enable or disable the Omnichannel historical analytics reports.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Omnichannel historical analytics** section, select **Manage**. The **Omnichannel historical analytics** page is displayed.

c. Set the **Enable Omnichannel historical analytics report** toggle to **On** to enable the reports or set the toggle to **No** to disable the reports.

2. Select **Save** or **Save and Close**.

This configuration will also enable AI-discovered topics from conversations with default settings and historical analytics for unified routing.

Enable historical analytics for unified routing in Omnichannel for Customer Service

You can enable historical analytics for unified routing in the Customer Service admin center or Omnichannel admin center app. The metrics are available in the report after 24 hours.

> **Important**
>
> Omnichannel historical analytics must be enabled before you can enable historical analytics for unified routing.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Omnichannel historical analytics** section, select **Manage**.

   The **Omnichannel historical analytics** page is displayed. Select the **Add historical analytics for unified routing** checkbox.

2. Select **Save** or **Save and Close**.

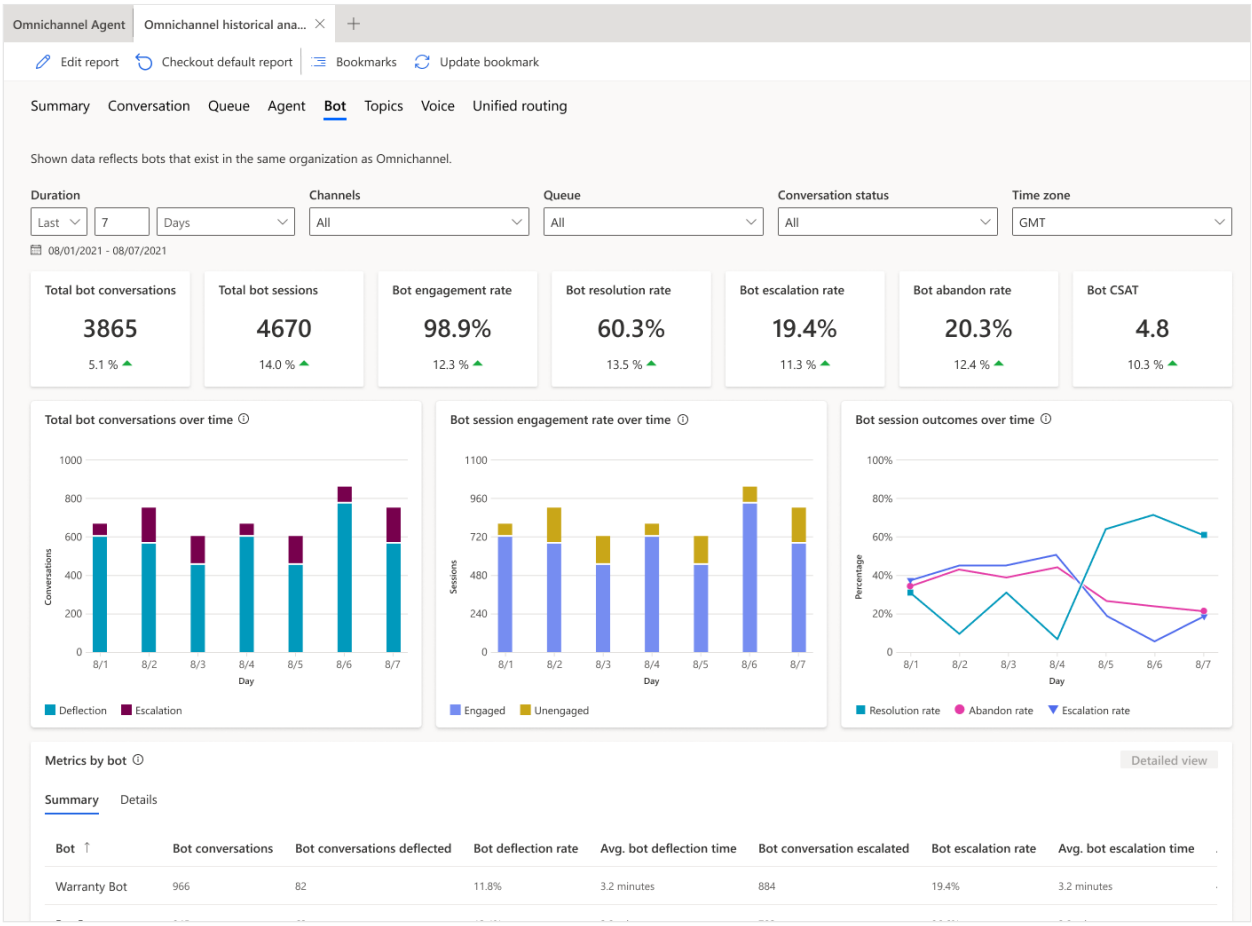
The Unified routing historical analytics report will be available as a tab in the Omnichannel historical analytics report.

Enable historical analytics for bots in Omnichannel for Customer Service

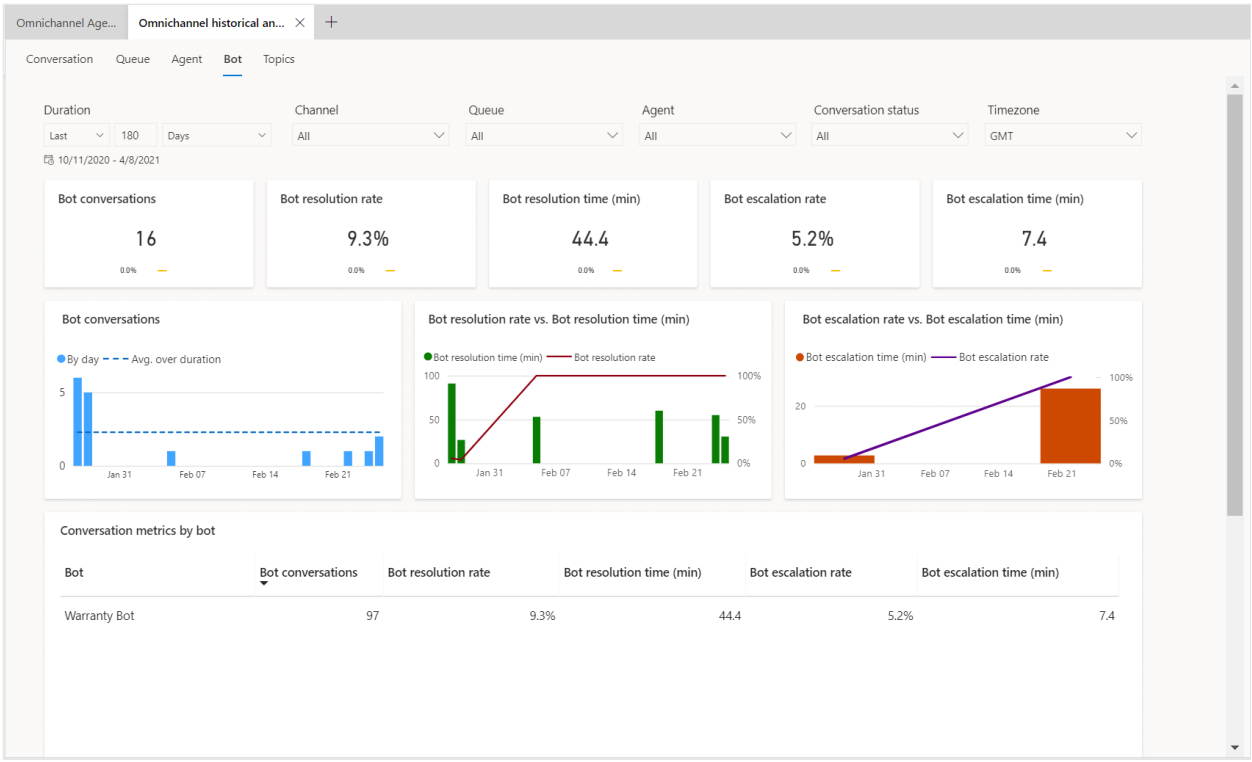
In Customer Service admin center, you can enable the historical analytics for bots to give your service managers integrated reports that combine Power Virtual Agents bots and Omnichannel conversation metrics.

> **ⓘ Important**
>
> Omnichannel historical analytics must be enabled before you can enable historical analytics for bots. This feature is available only if Power Virtual Agents bots are integrated with Omnichannel for Customer Service.

- If you select this option, the Omnichannel Summary and Bot dashboards will be available as a tab in the Omnichannel historical analytics report. The Bot dashboard shows metrics specific to the Power Virtual Agents bot.



- If no Power Virtual Agents bots are integrated with the application or you haven't selected this option, then the Bot dashboard displays the key performance indicators (KPIs) and charts for all bots.



Enable historical analytics for bots in Omnichannel for Customer Service

1. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
2. In the **Omnichannel historical analytics** section, select **Manage**. The **Omnichannel historical analytics** page is displayed.
3. Select the **Add historical analytics for bot** checkbox.
4. Select **Save** or **Save and Close**.

The unified routing historical analytics report will be available as a tab in the Omnichannel historical analytics report.

Enable historical analytics for voice in Omnichannel for Customer Service

You can enable the historical analytics dashboard for voice in the Customer Service admin center or Omnichannel admin center app. The metrics will be available in the dashboard 24 hours after you've enabled historical analytics.

> **ⓘ Important**
>
> Omnichannel historical analytics must be enabled before you can enable historical analytics for unified routing.

1. Go to one of the apps, and perform the following steps.

Customer Service admin center

a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
b. In the **Omnichannel historical analytics** section, select **Manage**.

The **Omnichannel historical analytics** page appears. Select the **Add historical analytics for voice** checkbox.

2. Select **Save** or **Save and Close**.

The historical analytics for voice dashboard will be available as a tab in the Omnichannel historical analytics report.

Enable historical analytics for voicemail in Omnichannel for Customer Service

You can enable the historical analytics dashboard for voicemail in the Customer Service admin center app. The metrics are available in the dashboard after 24 hours of enabling it.

1. In Customer Service admin center, select **Insights** in **Operations**.
2. For Omnichannel historical analytics, select **Manage**.
3. Select **Add historical analytics for voicemail**.

The historical analytics for voicemail dashboard will be available as a tab in the Omnichannel historical analytics report.

See also

Dashboard Overview
Historical analytics for unified routing in Omnichannel for Customer Service
Configure user security to resources in an environment
How access to a record is determined

Manage knowledge analytics

Article • 11/15/2022

The Knowledge analytics dashboard is designed to provide your supervisors and knowledge workers with valuable insights into how your support agents are searching and using knowledge articles.

By default, the Knowledge analytics dashboard is enabled for the System Administrator, Knowledge Manager, and CSR Manager roles. To configure user roles to access analytics and dashboards, see Configure user access to analytics and dashboards.

> **Note**
>
> Knowledge analytics provides data that's based on internal knowledge search and doesn't provide information about customer search behavior.

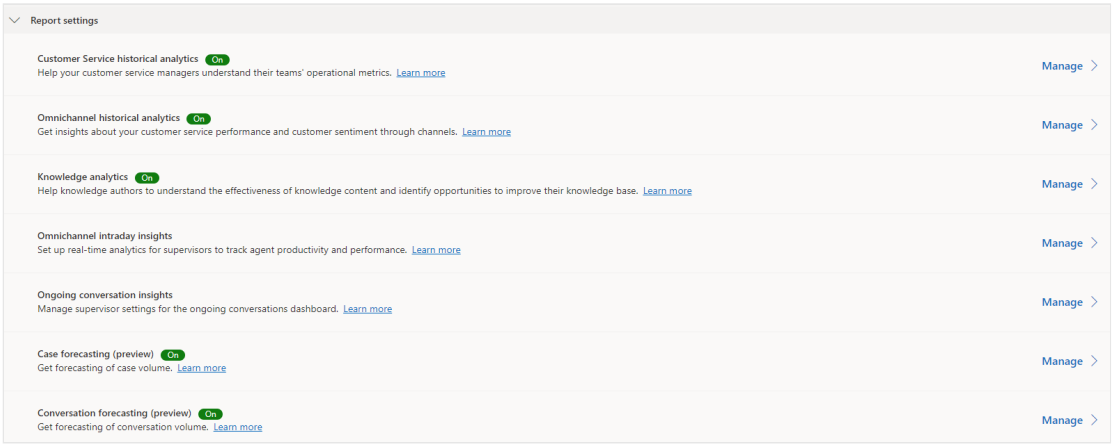
Manage Knowledge analytics dashboard

Use the Customer Service admin center or Customer Service Hub app to enable or disable the knowledge analytics reports.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Knowledge analytics** section, select **Manage**. The **Knowledge analytics** page is displayed.



2. Set the **Enable Knowledge analytics** toggle to **On** to enable the reports or set the toggle to **Off** to disable the reports.

3. Select **Save** or **Save and Close**.

Configure Search term insights dashboard

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Knowledge analytics** section, select **Manage**. The **Knowledge analytics** page is displayed.

2. In the **Additional features** section, select the **Add knowledge search analytics** checkbox.

3. Select **Save** or **Save and Close**.

View Knowledge analytics dashboards

To view the reports in Customer Service Hub, go to **Service** > **Insights** > **Knowledge analytics**.

To view the reports in Customer Service workspace, select the **plus (+)** icon, and then select **Knowledge analytics** from the dropdown list.

The **Article insights** dashboard is displayed. The **Search term insights dashboard** will be displayed if you have previously configured the steps in Configure Search term insights dashboard.

See also

Introduction to Customer Service analytics and insights
View and understand Customer Service analytics and insights in Customer Service Hub
View and understand Customer Service analytics
Configure user security to resources in an environment
How access to a record is determined

Configure Customer Service Analytics dashboards in Power BI

Article • 08/01/2023

> **Note**
>
> We recommend that you try out the latest analytics capabilities from Dynamics 365 Customer Service. The out-of-the-box reporting capabilities include **Omnichannel historical analytics** and **Customer Service historical analytics**. The reports can be **visually customized** and extended to add your additional data sources and metrics through **data model customization**.

You must perform the following steps to configure the historical Customer Service Analytics dashboards to display in the Customer Service Hub app:

Step 1: Review the prerequisites

Step 2: Install Dynamics 365 Customer Service Analytics app

Step 3: Connect Dynamics 365 organization to Customer Service Analytics app

Step 4: Configure refresh frequency on Power BI dataset

Step 5: Publish application within your organization

Step 6: Enable Power BI reporting

Step 7: Add Power BI Dashboard to Customer Service Hub

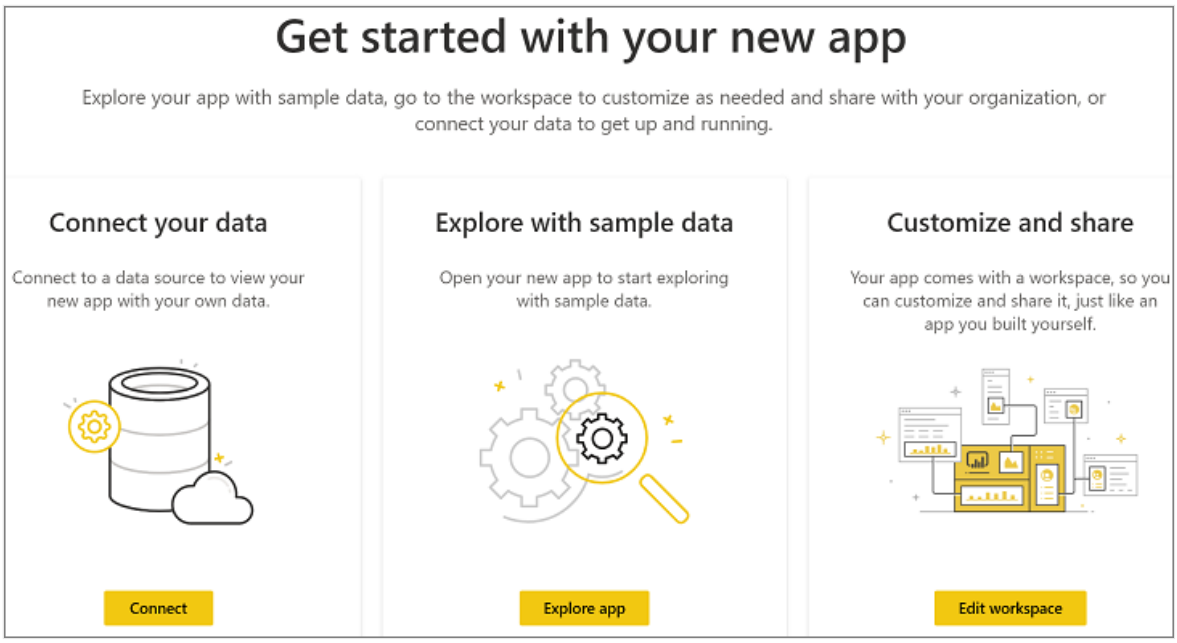
Step 1: Prerequisites

Review the following prerequisites before configuring the supervisor dashboard:

- You have administrative privileges for Dynamics 365 and Microsoft Power BI.
- You have a Power BI Pro license for all supervisors.
- Service Root URL of your Dynamics 365 instance.

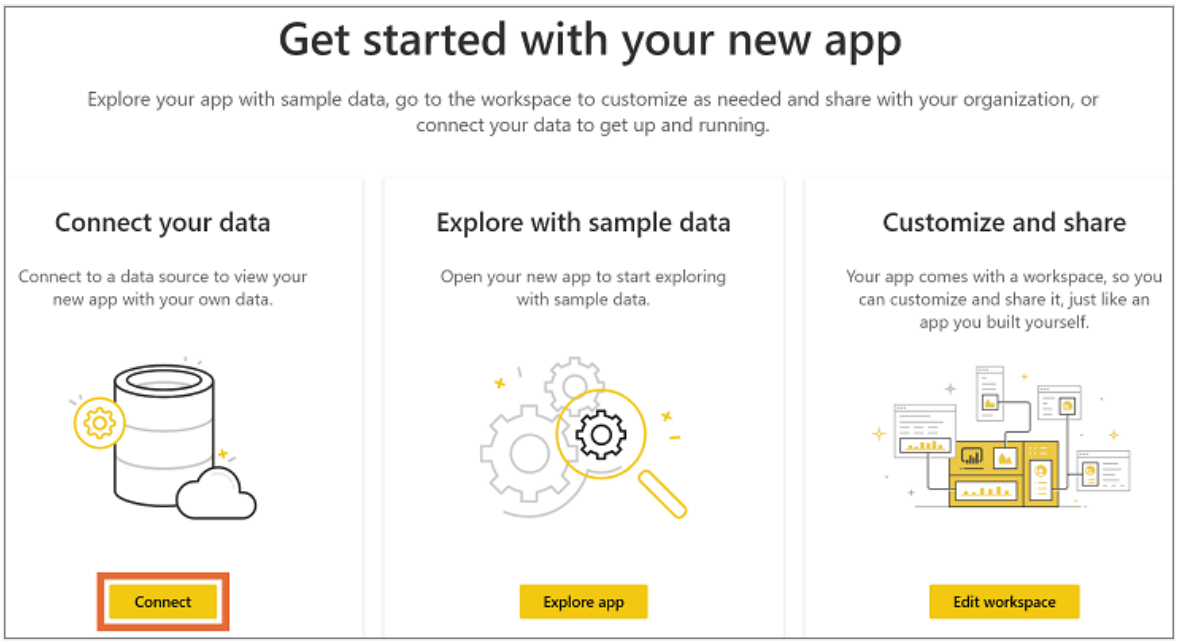
Step 2: Install Dynamics 365 Customer Service Analytics app

1. Sign in to Power BI app as an administrator.
2. As a Power BI admin, open the link: https://aka.ms/cs-analytics
3. Install the **Customer Service Analytics for Dynamics 365** app. The app configuration options page is displayed.

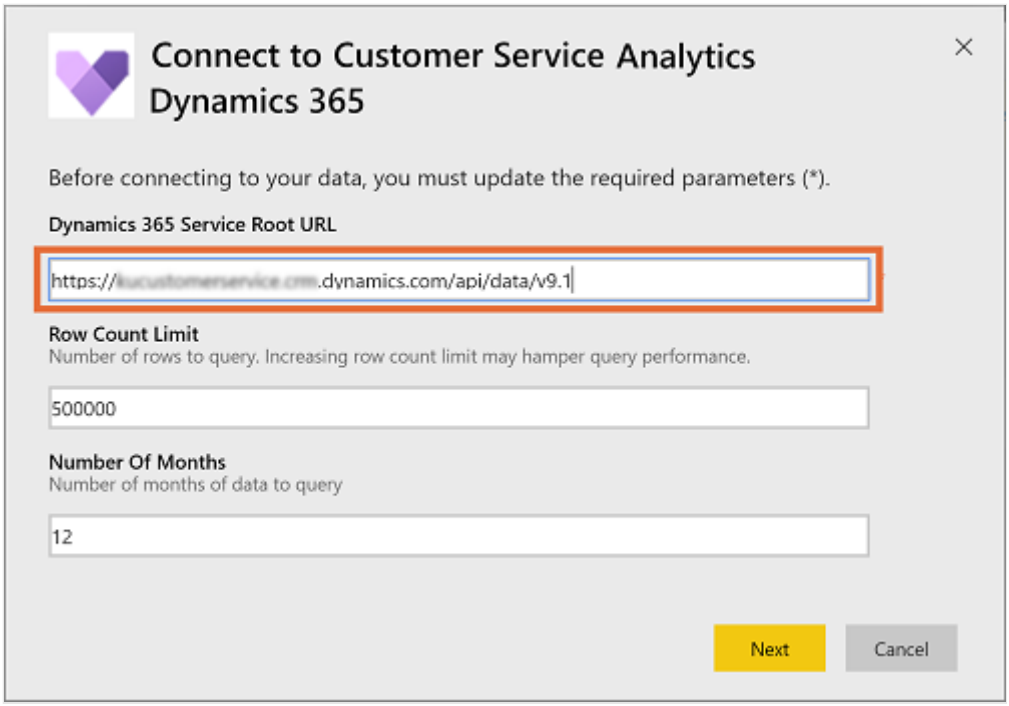


Step 3: Connect Dynamics 365 organization to Customer Service Analytics app

1. On the app configuration options page, select **Connect**.



2. On the **Connect to Customer Service Analytics for Dynamics 365** page, enter your organization's Dynamics 365 Service Root URL, and select **Next**.

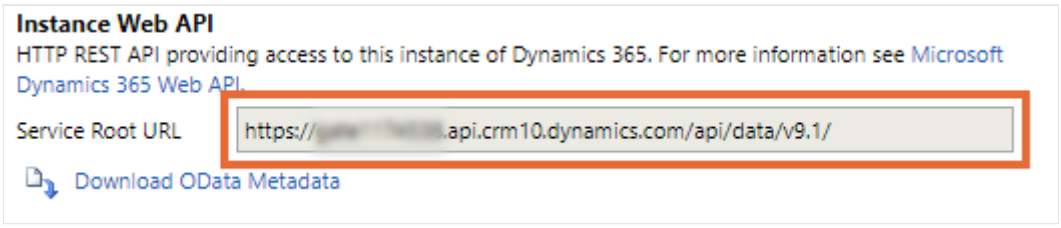


3. (Optional) To find the Microsoft Dynamics 365 Data URL, follow these steps:

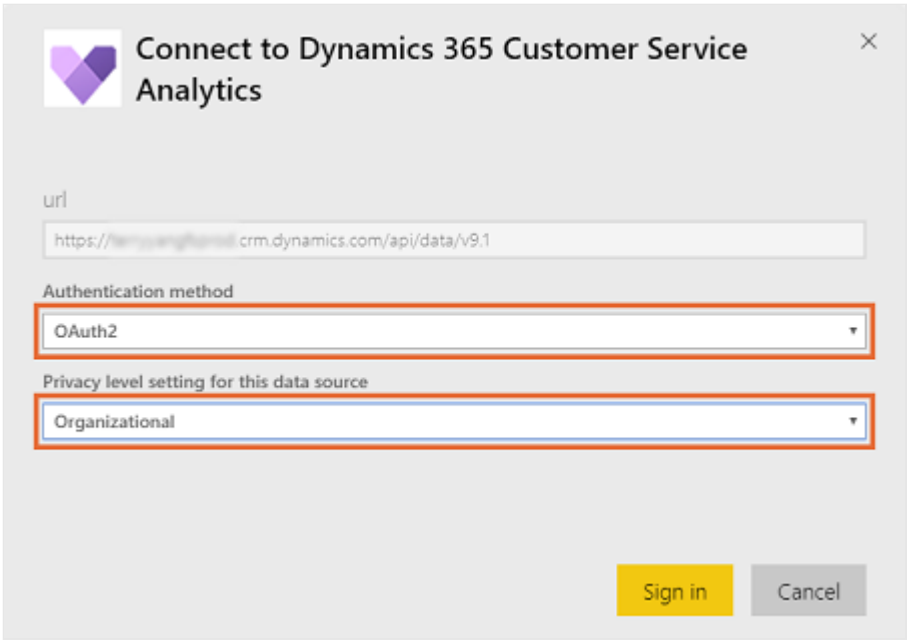
   a. Sign in to Dynamics 365 Customer Service.

   b. Go to **Settings** and then select **Developer Resources**.

   c. Find the Data URL under **Service Root URL**.



4. On the page that appears, select **OAuth2** in **Authentication method**, and **Organizational** in **Privacy level setting for this data source**.



5. Select **Sign in**. The sign-in page appears.

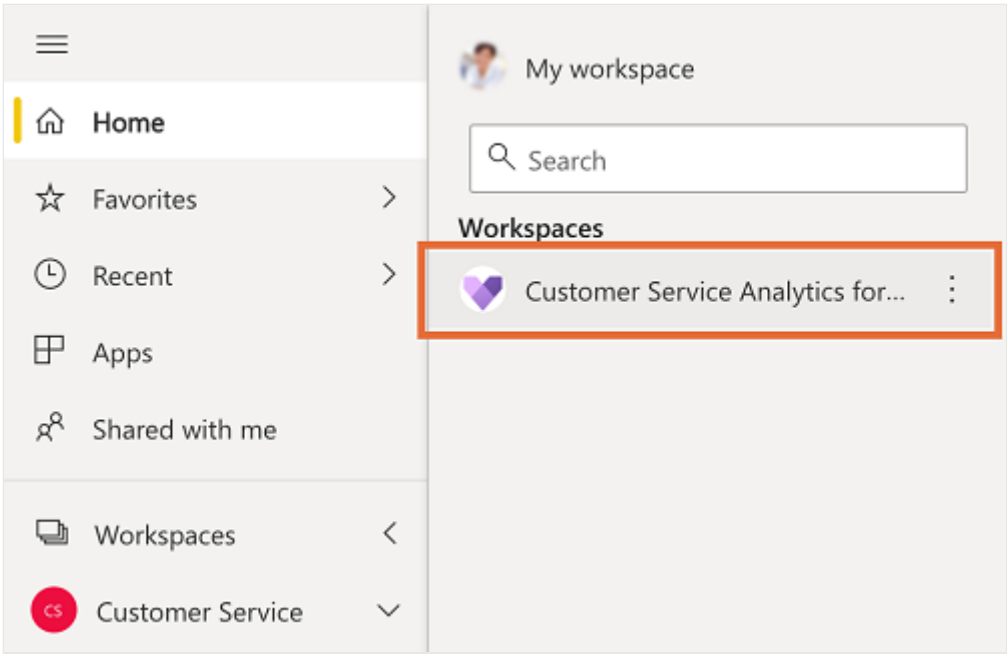
6. Enter your Dynamics 365 organization credentials, and select **Enter**. After you're signed in, the existing report is updated with the data from your organization.

Step 4: Configure refresh frequency on Power BI dataset

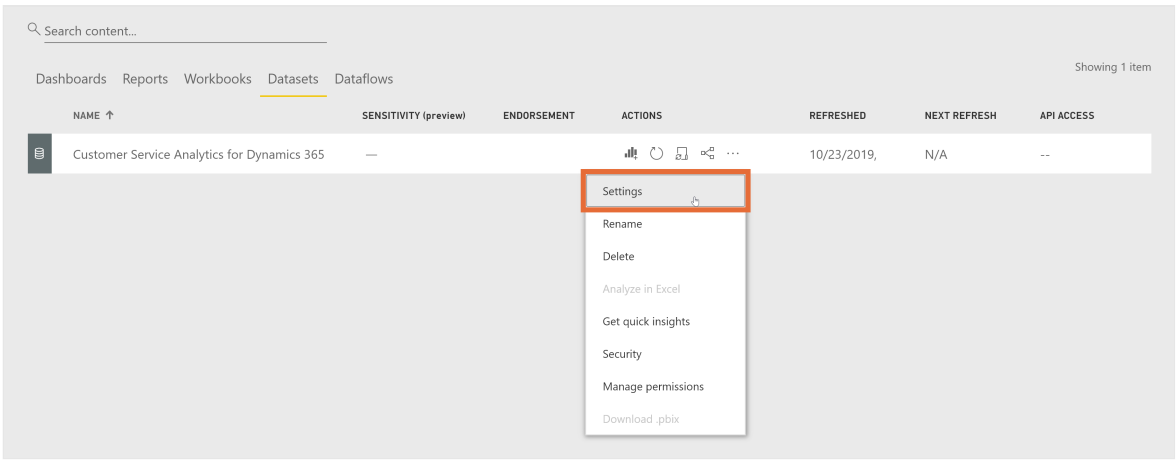
After you connect the Dynamics 365 Customer Service Analytics app with a Dynamics 365 organization, you need to configure the refresh frequency on the Power BI dataset to update reports and dashboards properly.

1. Sign in to Power BI as an administrator.

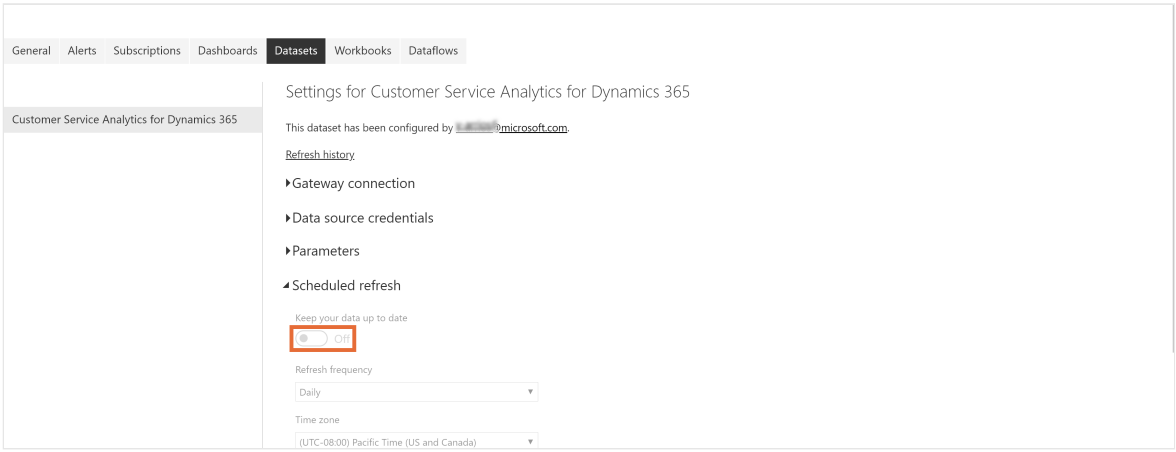
2. Go to the **Dynamics 365 Customer Service Analytics** app workspace.



3. Go to the **Datasets** tab and select **Settings**.



4. Turn **Scheduled refresh** to **On**.



Now, publish the application in your organization.

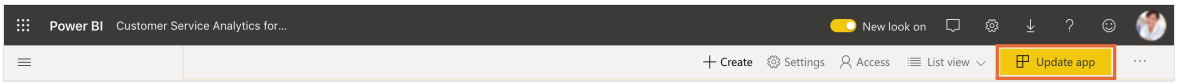
> **Note**

We recommend you configure the refresh frequency to **Daily**.

Step 5: Publish application within your organization

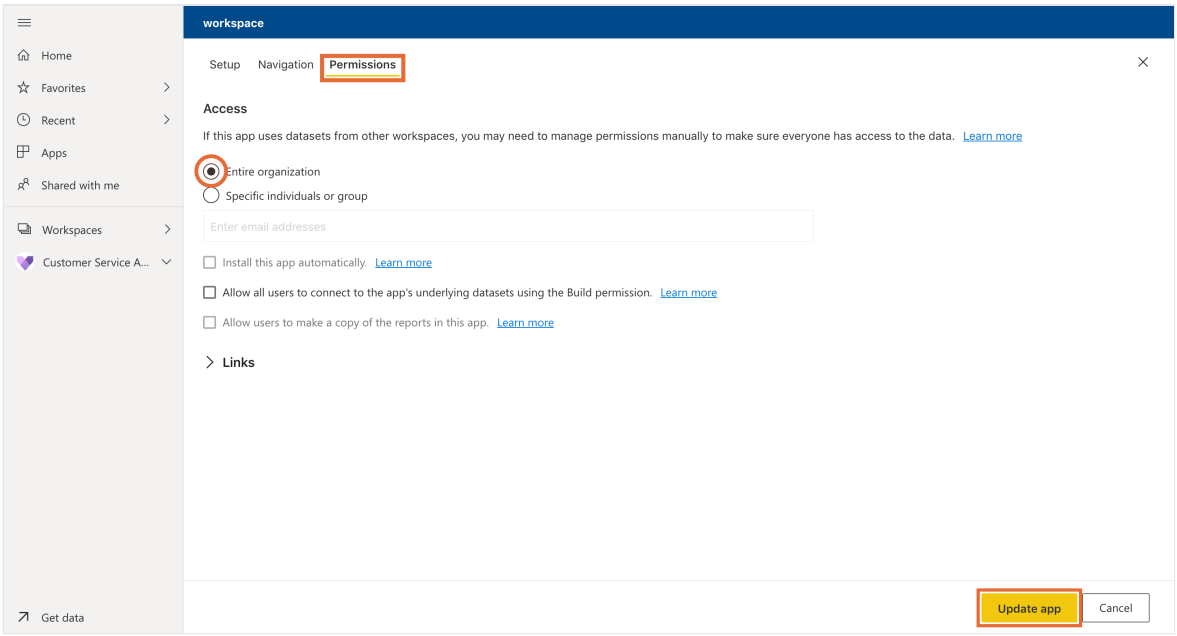
You must share the configured application with your entire organization for supervisors to view **Customer Service Analytics** dashboards and reports with their own **Power BI Pro** accounts.

1. On the app workspace, select **Update app**.



2. In the Update app wizard, go to the **Access** tab.

3. Choose **Entire organization** and select **Update app**.



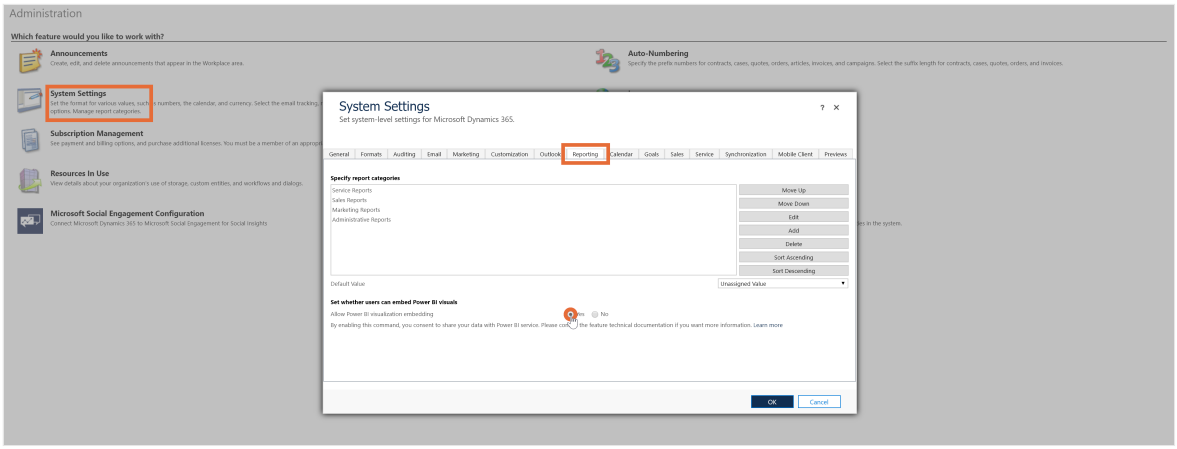
The app is now available to install for all individuals in your organization.

> **Note**
>
> Verify your administrator has allowed users in your organization to have read/write data permissions in Omnichannel Engagement Hub. To learn more, see **Set up Omnichannel for Customer Service**.

Step 6: Enable Power BI reporting

As an administrator, you must enable Power BI reporting in the Power Platform environment for supervisors to view the dashboards.

1. Sign in to Dynamics 365, and go to **Settings**.
2. Select **Administration** > **System Settings**.
3. Go to the **Reporting** tab and enable **Allow Power BI visualization embedding**.

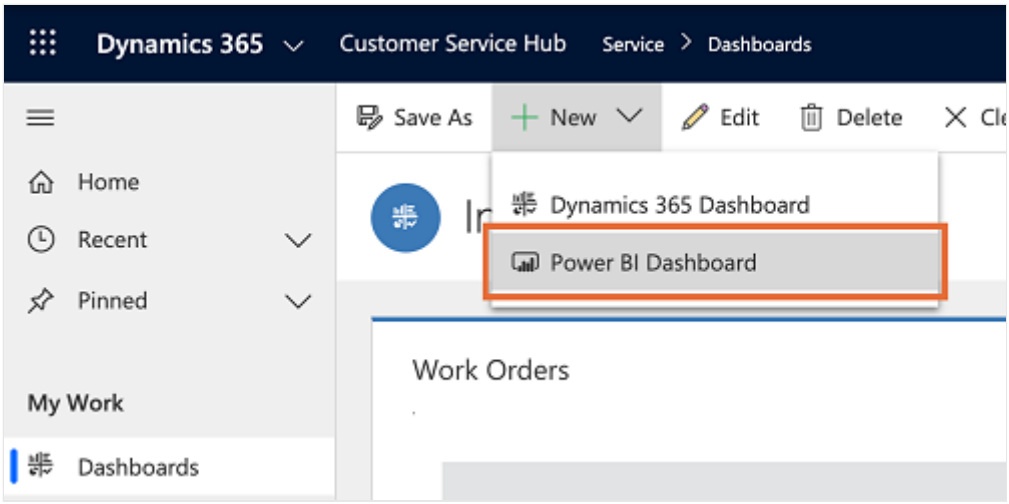


Supervisors can now configure dashboards.

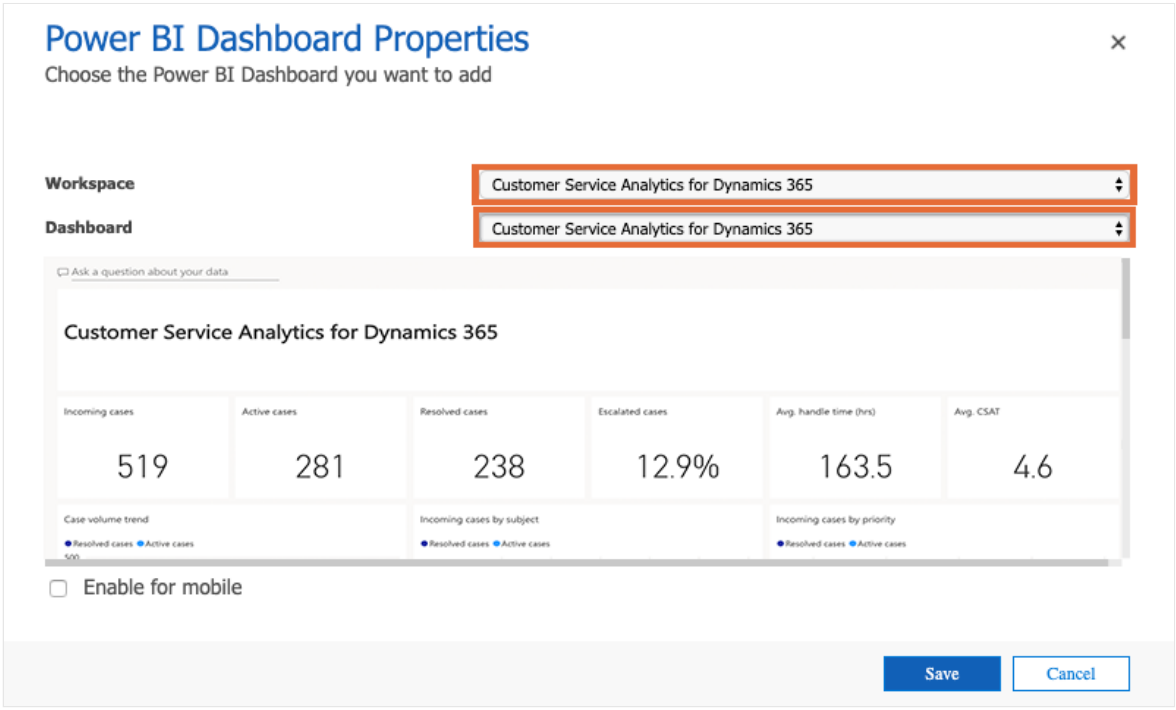
Step 7: Add Power BI dashboards to Customer Service Hub

Each supervisor must configure their environment to integrate the Customer Service Analytics dashboard.

1. Sign in to Dynamics 365 Customer Service and open the **Customer Service Hub** app.
2. Select **Dashboards** under **My Work**.
3. Select **New** > **Power BI Dashboard**.



4. For **Workspace**, select **Customer Service Analytics for Dynamics 365**. For **Dashboard**, select **Customer Service Analytics for Dynamics 365**.



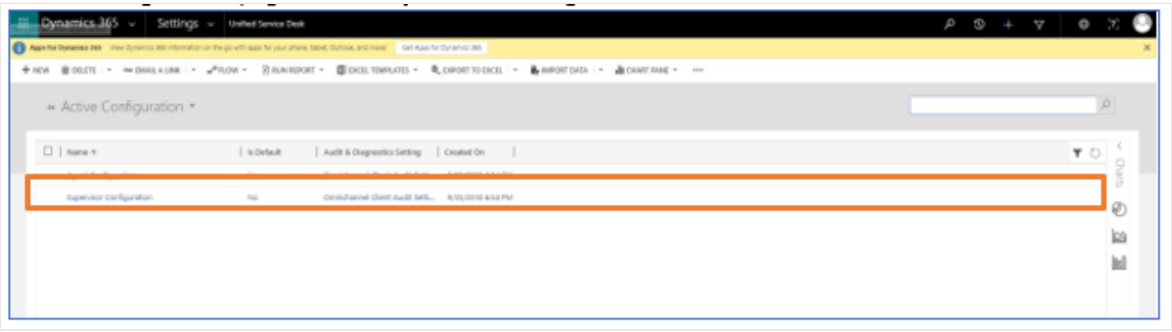
5. Save and close.

   The Customer Service Analytics dashboard is now available in Dynamics 365.

Add users to supervisor configuration

You must add users to the supervisor configuration to access any supervisor dashboard in Unified Service Desk. To add users in supervisor configuration, follow these steps:

1. Sign in to the Unified Service Desk Administrator app.
2. Select **Configuration**.
3. On the configuration page, select **Supervisor Configuration**.



4. On the **Users** section, select **+ Add Existing User**. The **Lookup Records** pane is displayed.
5. Search for the user and select **Add**.
6. Select **Save**.

   Users are now added to the supervisor dashboard. When they sign in to Omnichannel Engagement Hub on Unified Service Desk, the supervisor dashboard tabs will be available.

Customize Customer Service Analytics

> **ⓘ Important**
>
> Microsoft does not support customizations made to the Power BI template app and does not provide updates once modifications are made.

Power BI is a comprehensive collection of services and tools that you use to visualize your business data. Power BI Template apps make it easy to visualize and analyze the Customer Service Analytics data with Power BI based on a standard data model. The Customer Service Analytics template app is built with a set of entities and fields that are useful for most reporting scenarios.

Dynamics 365 apps are often extended with custom fields. These custom fields don't automatically show up in the Power BI model. This article describes how you can edit and extend the report included in the template app to include custom fields in the Power BI model.

Before you customize the template app, read the information here and perform each task, as necessary.

Prerequisites

- Power BI service registration.
- Power BI Desktop application for editing Power BI reports.
- Power BI report for the Customer Service template app that you want to customize.

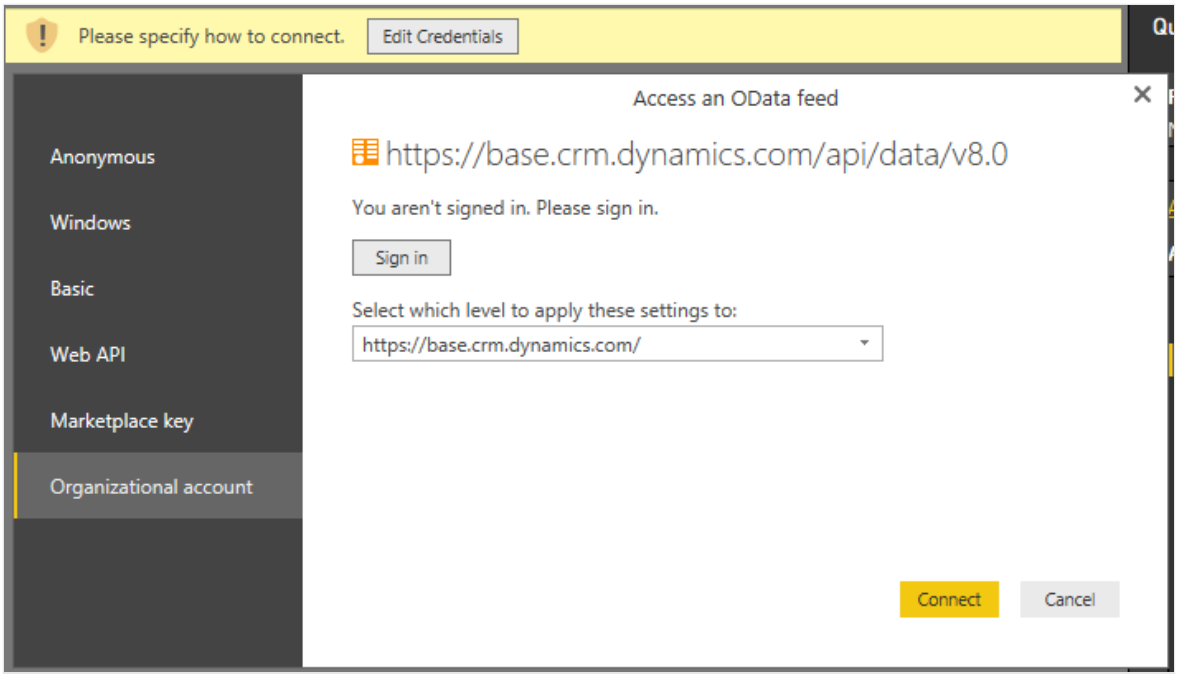
  Download the Power BI report for Customer Service Analytics for Dynamics 365

Prepare a PBIX for customization

1. Start Power BI Desktop.
2. Select **File** > **Open**. Open Customer Service Analytics for Dynamics 365.pbix, and then select **Open**.

   Several pages of reports are loaded and displayed in Power BI Desktop.
3. On the Power BI Desktop ribbon, select **Edit Queries**.
4. In the left navigation pane of the Edit Queries window, under **Queries**, select the **Dynamics 365 Service Root URL** query, and then on the ribbon, select **Advanced Editor**.

   In the source definition, replace **contosuites.crm10.dynamics.com** with your app's instance URL. For example, if the organization name is *Contoso*, the URL looks like this: Source = https://contoso.crm.dynamics.com/api/data/v9.1/
5. Select **Done** and then select **Close & Apply** in the Query Editor.
6. When the Access an OData feed dialog appears, select **Organizational account** and then select **Sign in**.

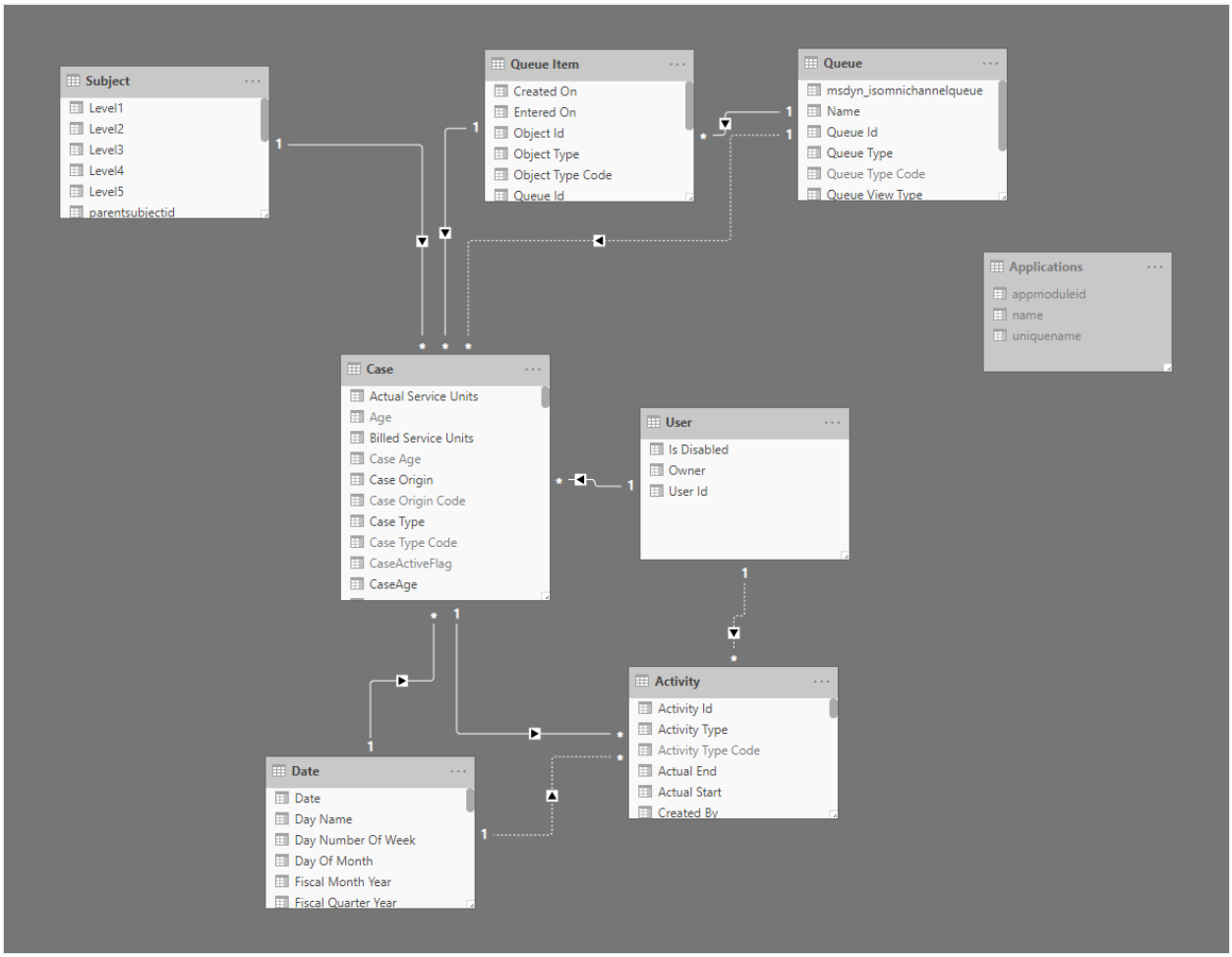


7. When the sign-in field appears, enter your credentials to authenticate to your instance.

8. In the Access an OData feed dialog, select **Connect**.

   The queries are updated. This might take several minutes.

Customer Service Analytics for Dynamics 365 template app data model diagram



See also

Introduction to Customer Service Analytics

View and understand Customer Service Analytics

Configure Omnichannel Insights dashboards

Article • 01/10/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Note**
>
> We recommend that you try out the latest analytics capabilities from Dynamics 365 Customer Service. The out-of-the-box reporting capabilities include **Omnichannel historical analytics** and **Customer Service historical analytics**. The reports can be **visually customized** and extended to add your additional data sources and metrics through **data model customization**.

Customer service managers or supervisors are responsible for managing agents who work to resolve customer queries every day through various service channels. They need to know key operational metrics to ensure that their agents are providing quality support. Omnichannel Insights consists of channels and sentiment analysis dashboards that can help with this.

> **Important**
>
> The supervisor dashboards that are based on Power BI, such as Omnichannel Insights and sentiment analysis, aren't available on Government Community Cloud (GCC).

Configure Omnichannel Insights

As an administrator, you must download the Omnichannel Insights for Dynamics 365 app and configure it to display channels and sentiment analysis dashboards in the Omnichannel for Customer Service app. To configure Omnichannel Insights, follow these steps:

Step 1: Review prerequisites

Step 2: Install Omnichannel Insights for Dynamics 365 app

Step 3: Connect to Omnichannel Insights for Dynamics 365 app

Step 4: Configure refresh frequency on Power BI Dataset

Step 5: Publish application within your organization

Step 6: Add Power BI Dashboards to Omnichannel for Customer Service

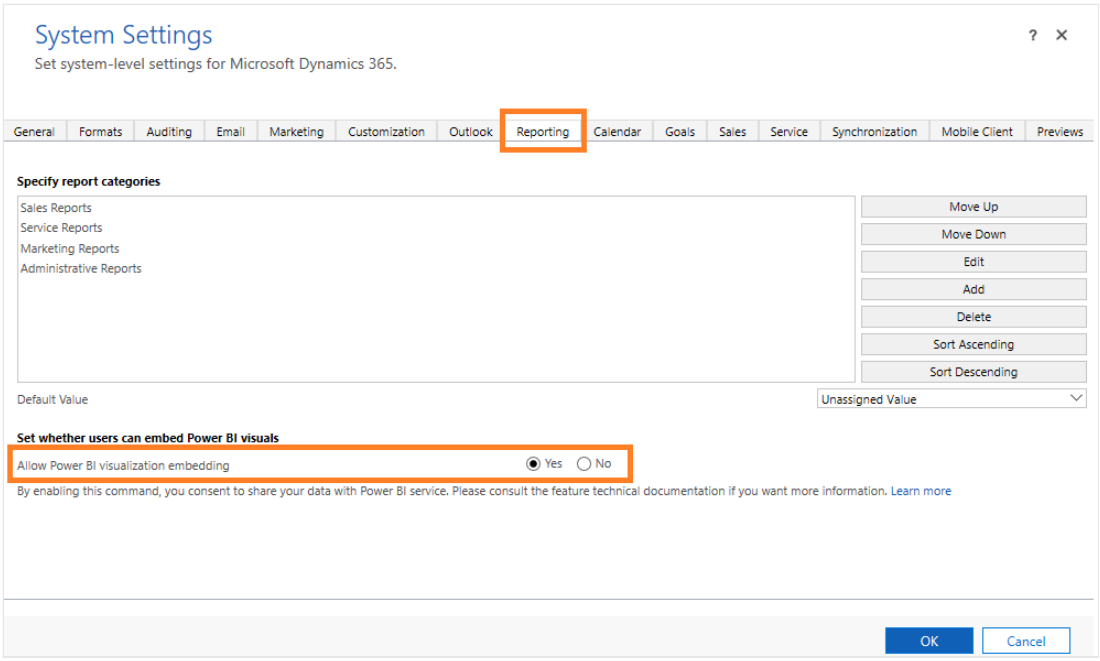
Step 1: Review prerequisites

Make sure the following prerequisites have been met before configuring the dashboard:

- You have administrative privileges for Dynamics 365 Customer Service and Power BI.
- You have Power BI Pro license that is required to do the following:
  - To get Omnichannel insights from app store and install it in your organization.
  - For users to use the template app or to share it with other Power BI Pro users.
- You have assigned template app workspace to a premium capacity so that every free user in the organization can consume the report. For information, see Ways to collaborate and share in Power BI.
- You have enabled the embedding of Power BI reports in Dynamics 365 Customer Service by doing the following:

    1. Sign in to **Dynamics 365 Customer Service** and go to **Settings** > **Administration** > **System Settings**.

    2. Go to the **Reporting** tab and select **Yes** for **Allow Power BI visualization embedding**.



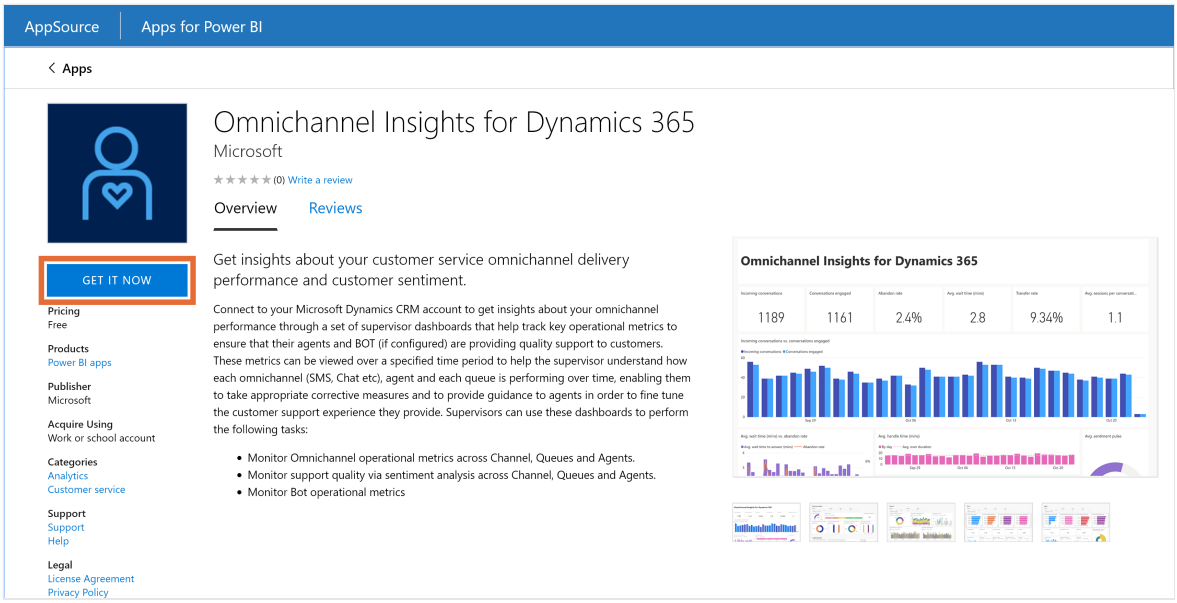
3. Select **OK**.

Step 2A: Install Omnichannel Insights for Dynamics 365 app

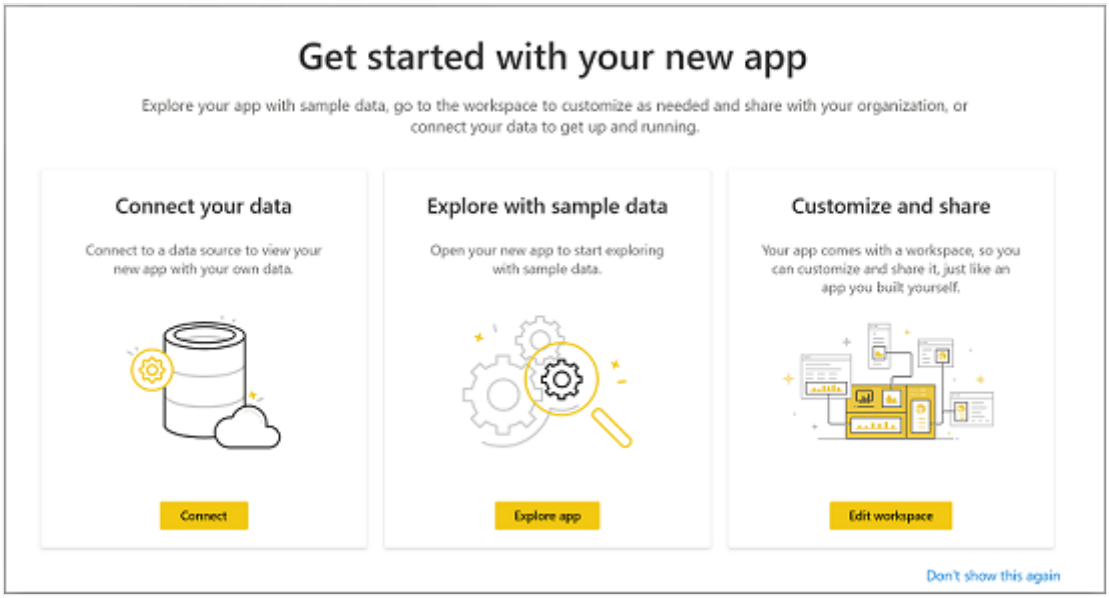
1. Sign in to the Power BI app as an administrator.
2. As a Power BI administrator, open the Omnichannel Insights for Dynamics 365 app page.

> **Important**
>
> The **Install template apps not listed in AppSource** in **Tenant settings** should be enabled by your administrator in the Power BI admin portal.

3. Select **GET IT NOW** to install the app.



4. After the **Omnichannel Insights** app is installed, select the app and the configuration options page will be displayed.

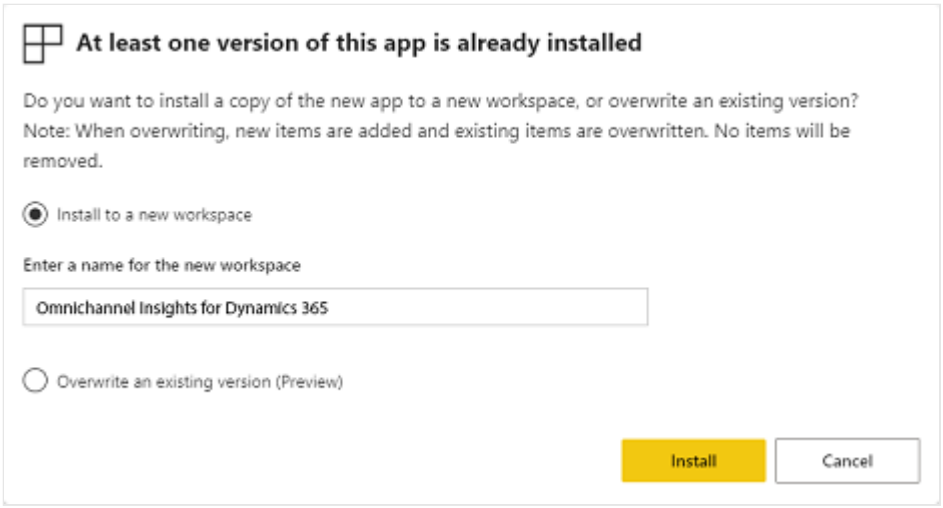


Proceed to configure the app by connecting your organization.

Step 2B: Configure existing Omnichannel Insights for Dynamics 365 app

If a previous version of Omnichannel Insights was installed, we strongly recommend that you install the latest version of Omnichannel Insights to avoid losing any customization.

1. During the Omnichannel Insights app installation, the following appears:



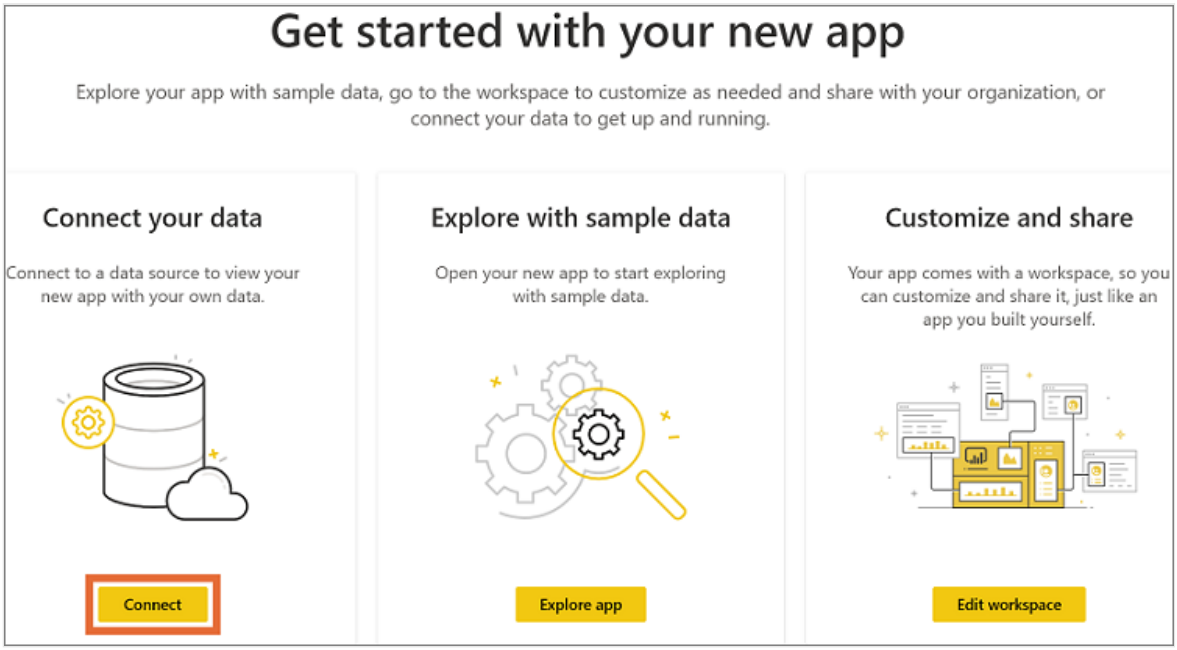
2. Choose the **Install to a new workspace** option.

3. Select **Install**.

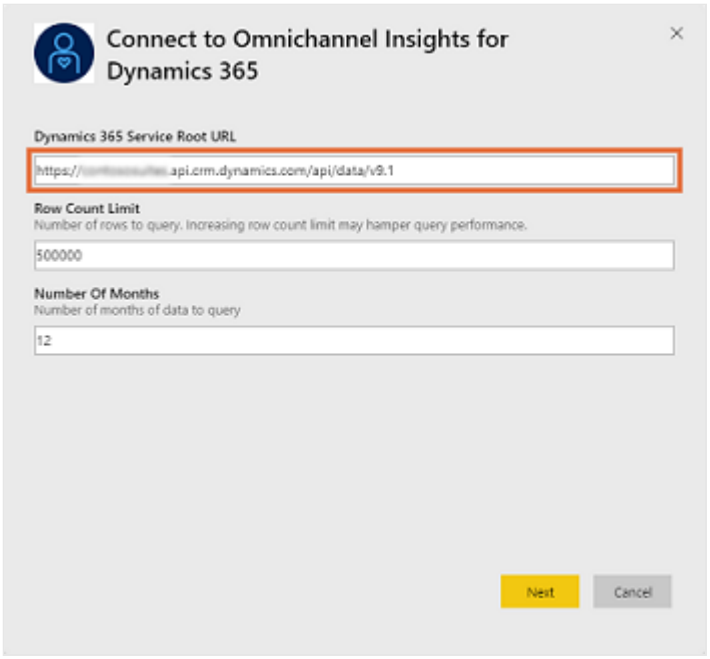
4. Re-implement customizations into the new workspace.

Step 3: Connect to Omnichannel Insights for Dynamics 365 app

1. On the **Omnichannel Insights for Dynamics 365** app configuration page, select **Connect**.



2. On the connect data page, enter your organization's CRM OData feed URL, and select **Next**.

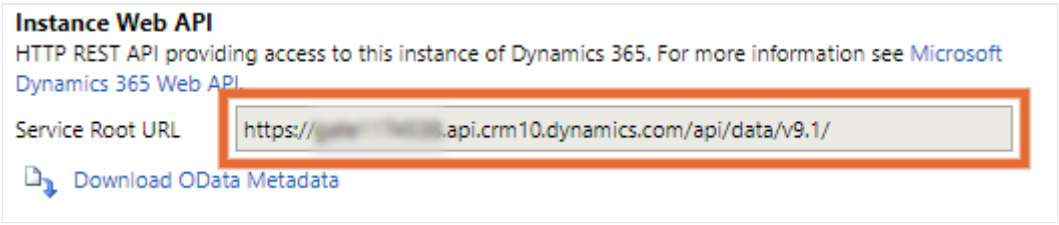


3. (Optional) To find the Microsoft Dynamics 365 OData URL, follow these steps:

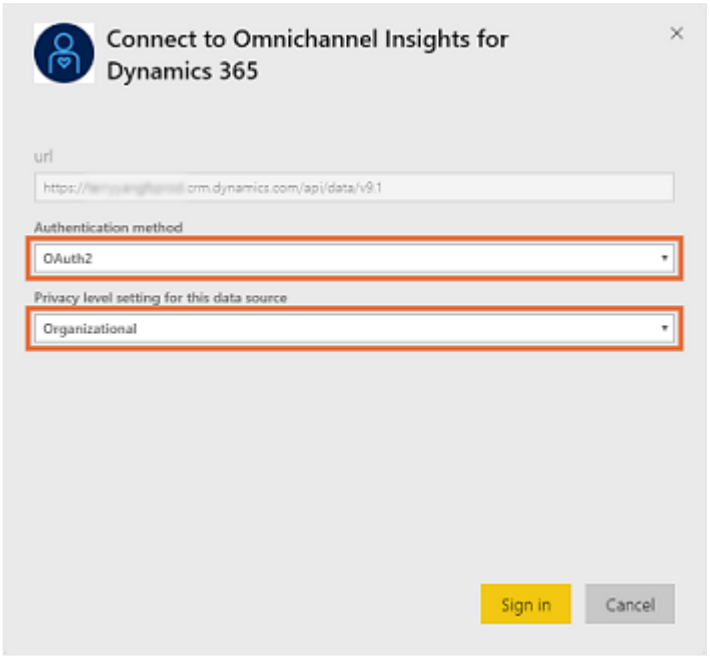
   a. Sign in to Dynamics 365 Customer Service.

   b. Go to **Settings** > **Customizations** and then select **Developer Resources**.

   c. Find the OData URL under **Service Root URL**.



4. Select **Authentication method** as **OAuth2** and **Privacy level** as **Organizational**. Select **Sign in**.



5. Enter your Dynamics 365 Customer Service credentials and select **Enter**.

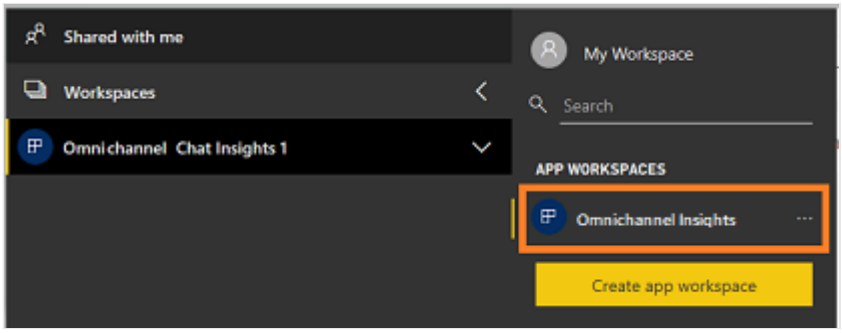
   When you are signed in, the existing report is updated with the data from your organization.

Step 4: Configure refresh frequency on Power BI dataset

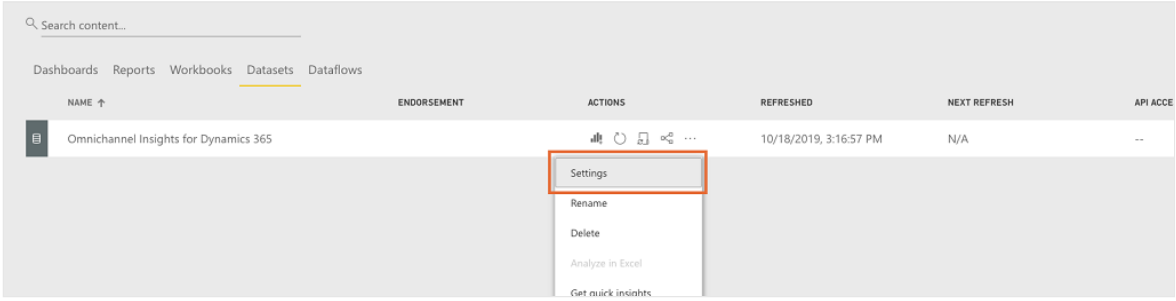
After you connect the Dynamics 365 Omnichannel Insights app with a Dynamics 365 organization, you need to configure the refresh frequency on the Power BI dataset so reports and dashboards refresh properly.

1. Sign in to Power BI as an administrator.

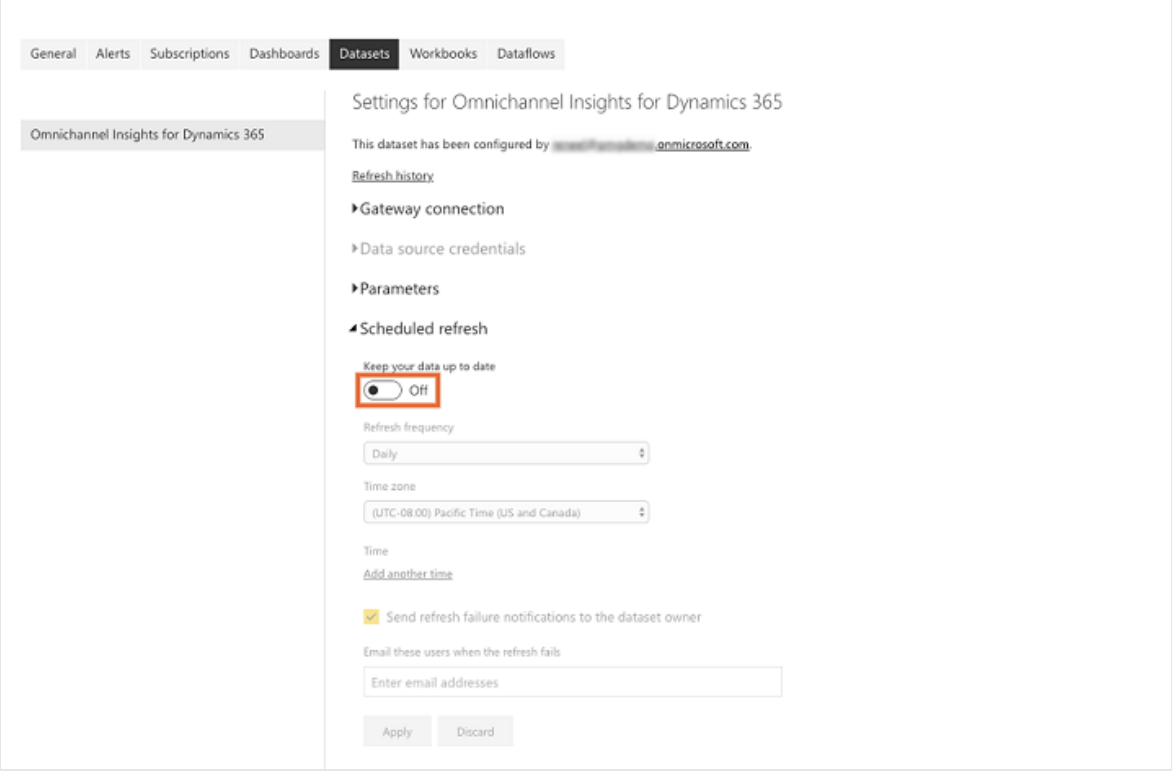
2. Go to the **Omnichannel Insights** app workspace.



3. On the **Datasets** tab, select **Settings**.



4. Turn **Scheduled refresh** to **On**.



> **Note**
>
> We recommend that you set the refresh frequency to **Daily**.

5. Select **Apply**.

Omnichannel Insights reports and dashboards will refresh daily.

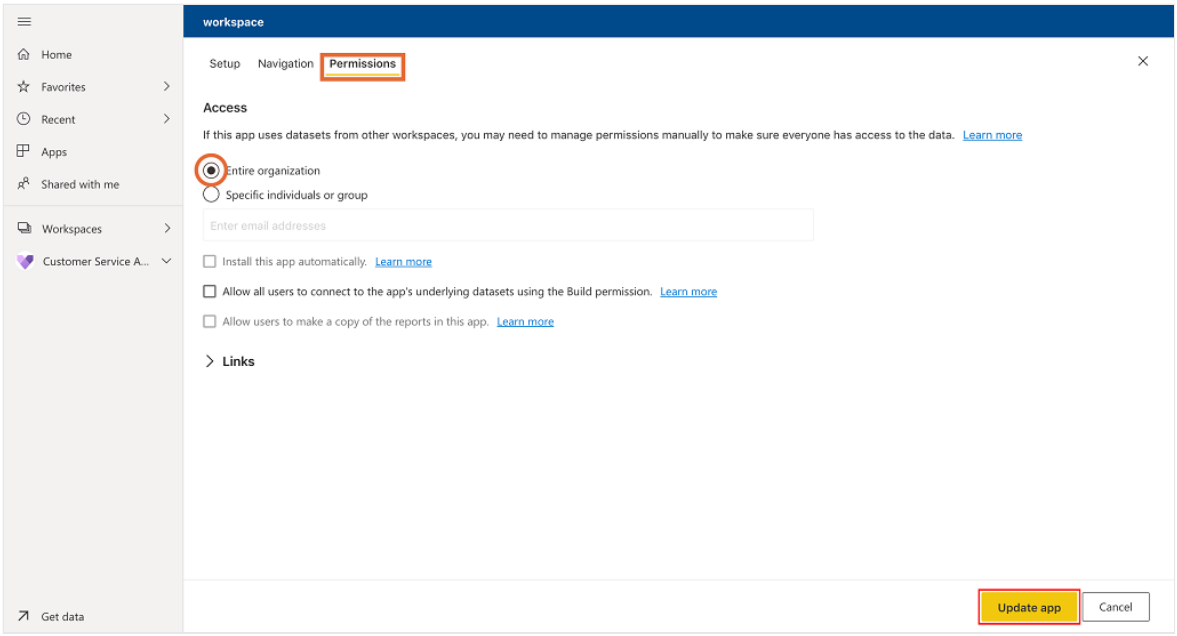
Step 5: Publish application within your organization

You must share the configured application with your entire organization for supervisors to view the **Omnichannel Insights** dashboards and reports with their own **Power BI Pro** accounts.

1. On the App workspace, select **Update app** to open the Update app wizard.

2. On the **Update app** wizard, go to the **Access** tab.

3. Choose **Entire organization** and select **Update app**.



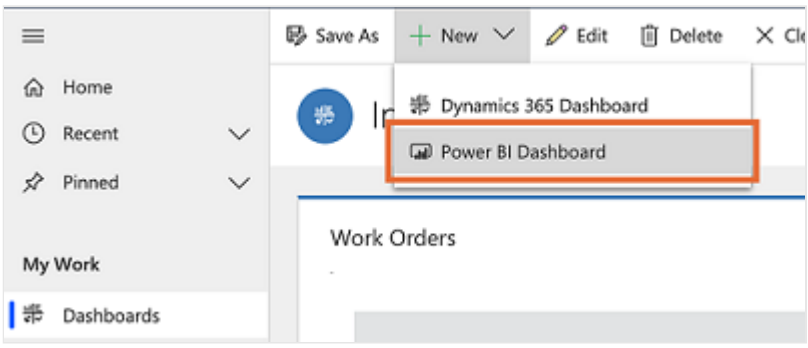
The app is now available to install for all individuals in your organization.

> **Note**
>
> Verify your administrator has allowed users in your organization to have read/write data permissions in Omnichannel Engagement Hub. To learn more, see **Provide data access consent**.

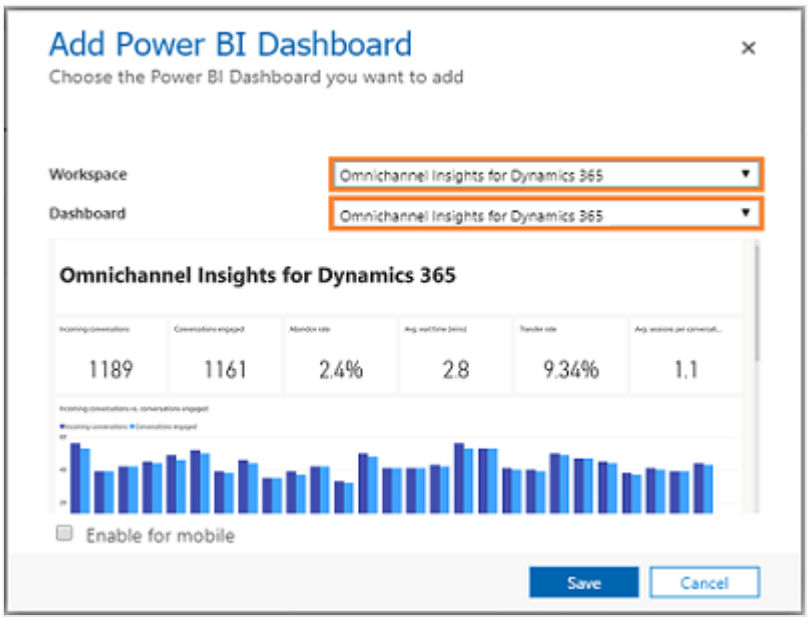
Step 6: Add Power BI Dashboards to Omnichannel for Customer Service

Each supervisor must configure their Power Platform environment to integrate the Omnichannel Insights and Omnichannel Sentiment Analysis dashboards.

1. Sign in to the Omnichannel for Customer Service app.
2. Select **Overview Dashboard** under **Supervisor Experience**.
3. Select **New** and then select **Power BI Dashboard**.

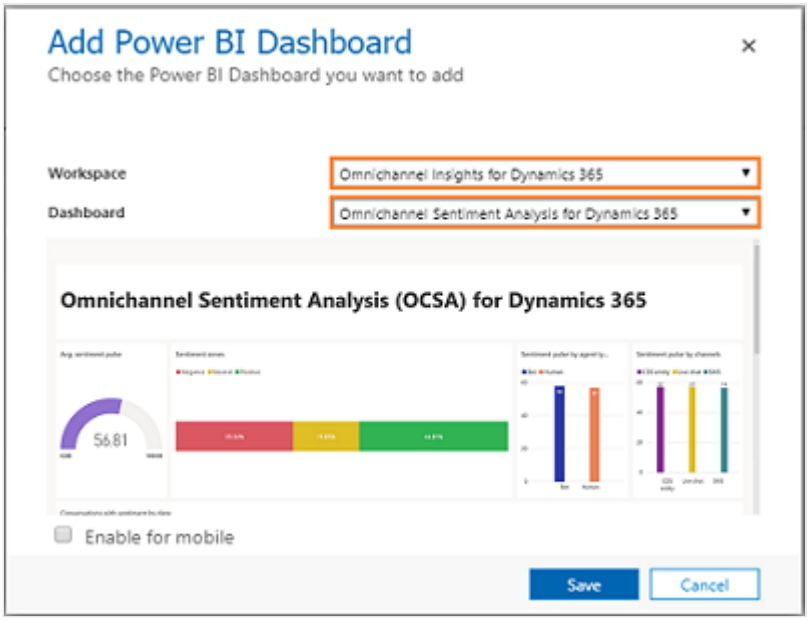


4. a. In the Workspace field, select **Omnichannel Insights for Dynamics 365**.
   b. In the Dashboard field, select **Omnichannel Insights for Dynamics 365**.



5. Save and close.

6. Repeat Steps 3–5 to add Omnichannel Insights - Sentiment Analysis dashboard.



   The Omnichannel Insights and Omnichannel Sentiment Analysis dashboards are now available in Dynamics 365.

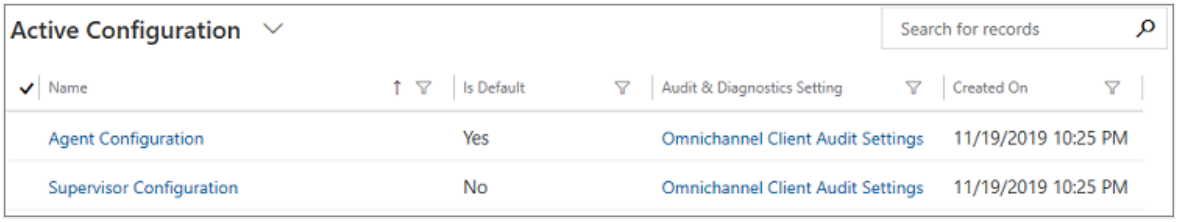
Add users to supervisor configuration

You must add users to the supervisor configuration to access any supervisor dashboard in Unified Service Desk. To add users to the supervisor configuration, follow these steps:

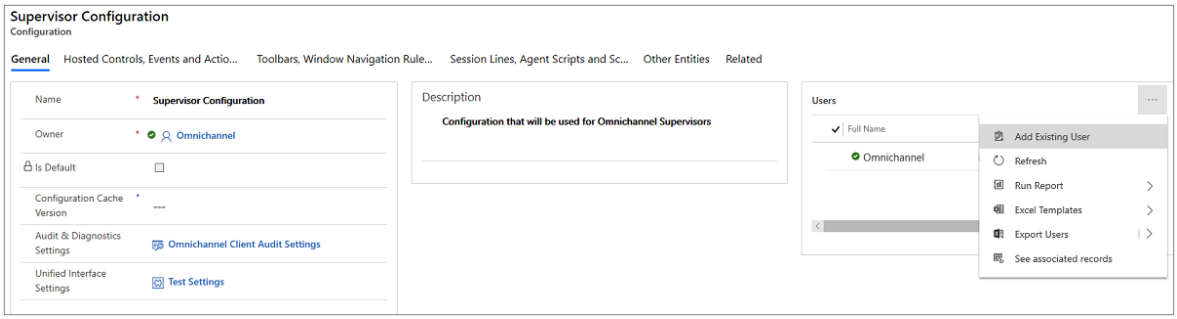
1. Sign in to Unified Service Desk.

2. Go to **Configuration** under **Advanced Settings**.

3. Select **Supervisor Configuration**.



4. On the **Users** section, select **...** and select **Add Existing User**. The **Lookup Records** pane is displayed.



5. Type the name of the user you want to add, and select **Add**.

6. Save and close the configuration.

   Users are added to the supervisor dashboard. Now when they sign in to Omnichannel on Unified Service Desk, the supervisor dashboard tabs are available.

Customize Omnichannel Insights

> **ⓘ Important**
>
> Microsoft does not support customizations made to the Power BI template app and does not provide updates after modifications are made.

Power BI is a comprehensive collection of services and tools that are used to visualize business data. The Power BI Template apps make it easy to visualize and analyze the Omnichannel Insights data with Power BI based on a standard data model.

The Omnichannel Insights template app is built with a set of entities and fields that are useful for most reporting scenarios. Dynamics 365 apps are often extended with custom fields. These custom fields don't automatically show up in the Power BI model.

The following shows you how edit and extend the report included in the template app to include custom fields in the Power BI model.

Before customizing the template app, read the following information and perform each task as necessary.

Requirements

- Power BI service registration.
- Power BI Desktop application for editing Power BI reports.
- Power BI report for Omnichannel Insights template app that you want to customize. Download the Omnichannel Insights report.
- Preview: Download template app for sentiment drivers reporting

Prepare PBIX for customization

1. Start Power BI Desktop.
2. Select **File** > **Open**, open Omnichannel Insights for Dynamics 365.pbix, and then select **Open**.

   Several pages of reports are loaded and displayed in Power BI Desktop.
3. On the Power BI Desktop ribbon, select **Home** > **Transform Data**.
4. In the left dropwdown menu under Transformation Data, select **Edit Paramaters**.
5. In the source definition, replace `**https://kucustomerservice.crm.dynamics.com/api/data/v9.1**` with your apps instance URL.

   Example: if the organization name is Contoso, the URL looks like this: Source = `https://contoso.crm.dynamics.com/api/data/v9.1/`

   For GCC users the format is: `**https://yourserver.crm9.dynamics.com/api/data/v9.1**`
6. Select **Done**.
7. Select **Close & Apply** in the yellow warning ribbon that appears under the Power BI Desktop Ribbon.

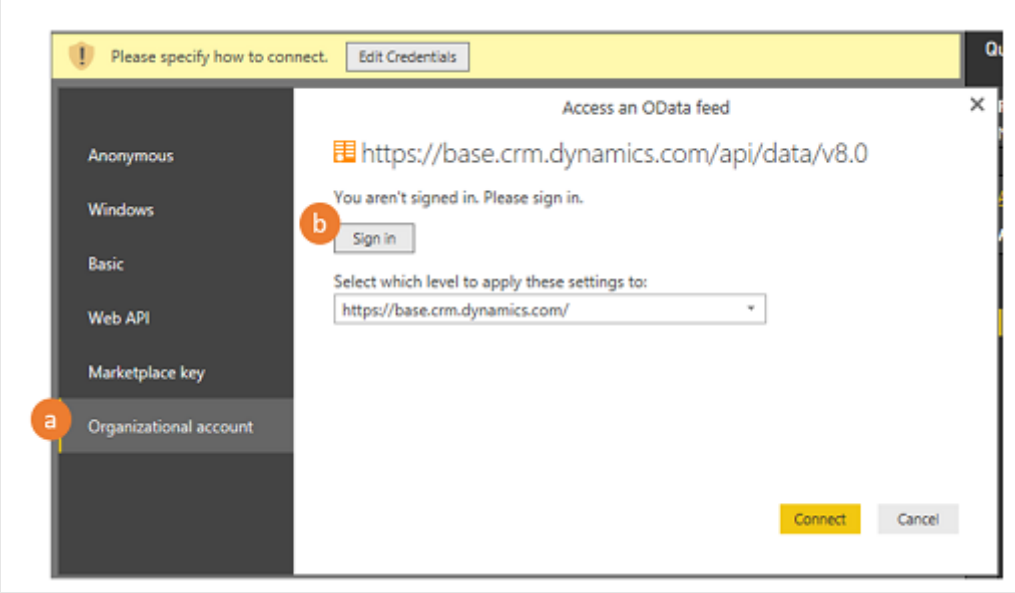
   Queries are updated. This might take several minutes.

8. If the "Access an OData feed" appears, select **Organizational account**.

9. Select **Sign in**.

10. If needed, you can also access this from Power BI desktop by going to **File** > **Options and Settings** > **Data Source Settings.**

    a. Select **Edit Permissions** > **Edit** b. Select **Organizational account.** c. Select **Sign in.**



11. When the sign-in field appears, enter your credentials to authenticate to your instance.

12. In the **Access an OData feed** dialog, select **Connect**.

    Queries are updated. This might take several minutes.

See also

Introduction to Omnichannel Insights dashboard
View and understand Omnichannel Insights dashboards

Customize data models of historical and real-time analytics reports

Article • 08/31/2023

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

Use the extensibility feature in Microsoft Power BI to extend the out-of-the-box data models for the analytics reports in Customer Service and integrate with other datasets to create new custom metrics. You can customize the out-of-the-box standard reports and add your own KPIs to view the key metrics that are relevant to your organization. You can add custom metrics to the detail reports also.

The key capabilities of model customization include the ability to:

- Edit the out-of-the-box data model and add new metrics.
- Bring in your own custom entities from Dataverse or any other source and extend the Power BI data model.
- Publish the customized report to a specific Power BI workspace.
- Customize the report site map and enable users to access the reports natively from Customer Service workspace.

Enable data model customization for historical and real-time analytics reports in Customer Service admin center, and then do the following tasks:

1. Select a Power BI workspace.
2. Provision the data models and copy of reports.
3. Grant permissions for dataset and reports.
4. Embed customized reports back to Dynamics 365.

Prerequisites

Before you begin, you must complete the following prerequisites:

- Your organization must have the Power BI Professional or Power BI Premium license for all supervisors and administrators.

- Enable insights features in Customer Service:
  - If you are enabling historical data model customization, you must enable at least one of the historical reports, such as Customer Service historical analytics, Omnichannel historical analytics, or knowledge analytics. More information: Configure analytics and insights dashboards
  - If you are enabling real-time data model customization, you must enable real-time analytics for Omnichannel. More information: Configure analytics and insights dashboards

- Create a Microsoft Entra ID security group:

  - Your Microsoft Entra ID administrator must create a security group with your preferred name in Microsoft Entra ID and add **Dynamics 365 Analytics** service account as a member of this security group. More information: Create a basic group and add members using Azure Active Directory

    The out-of-the-box **Service Principal Dynamics 365 Analytics** is used to deploy the data model and make changes to the Power BI workspace on behalf of Customer Service.

    Permissions within Power BI can be granted to groups only and not individual service principals, and therefore a group needs to be created.

  > **Note**
  >
  > In organizations where Dynamics 365 Analytics service account may not be available, you'll need to use the Dynamics CCA Data Analytics service account.

- Enable Power BI service features from the Power BI admin portal. The Power BI administrator must enable the following, either for the entire organization or the for the security group created earlier:

  - **Create workspace (new workspace experience)**: Enabling this creates two workspaces, a managed workspace and a customer workspace to deploy Dynamics data model and reports.

  - **Allow service principals to use Power BI APIs**: This uses the Power BI APIs for creating workspaces, deploying reports and models.

  - **Allow DirectQuery connections to Power BI datasets**: When report authors build new metrics or bring additional data sources, they create composite models, so DirectQuery needs to be enabled. Users who view reports built on top of data model in Dynamics 365 require this permission. Work with your

Microsoft Entra ID administrator to identify a security group that has all the required Dynamics users.

- **Allow XMLA endpoints and Analyze in Excel with on-premise datasets**: When report authors build new metrics or bring additional data sources, they create composite models, so this feature needs to be enabled. Users who view reports built on top of data model in Dynamics 365 require this permission.

- **Embed content in apps** (**Optional**): Enabling this embeds customized reports in Dynamics 365 (Step 4: Embed customized reports back to Dynamics 365). Users who view the custom reports from Dynamics 365 Customer Service require this permission. Work with your Microsoft Entra ID administrator to identify a security group that has all the required Dynamics users.

- If you plan to use an existing Power BI workspace to host the copy of the out-of-the-box reports (customer workspace), make sure that the Dynamics Administrator (user login) enabling the model customization is a workspace administrator of that Power BI workspace.

Enable Power BI data model customization

1. In the Customer Service admin center site map, select **Insights** in **Operations**.
2. On the **Insights** page in the **Report settings** section:
   a. For historical, select **Embedded Power BI extensibility - Historical data model customization** and then select **Manage**.
   b. For real time, select **Embedded Power BI extensibility - Real-time data model customization** and then select **Manage**.
3. On the selected page, switch the **Enable embedded Power BI data model customization** toggle to **On**.

Step 1: Select a Power BI workspace

Specify the Power BI workspace where the Dynamics data model and reports will be provisioned.

1. From the Insights page, go to the data model for which you want to select a Power BI workspace.

2. Select **Create new workspace** or to use an existing workspace, select a workspace from the dropdown list.

3. Select **Save**. This initiates the provisioning of the reports.

> **Note**
>
> The specified workspace applies only to the customer's workspace. A new managed workspace will be created by Microsoft for historical and real-time reports each, when configured. For more information, go to: **How data model customization works**. You can also specify the same workspace for both historical and real-time analytics reports.

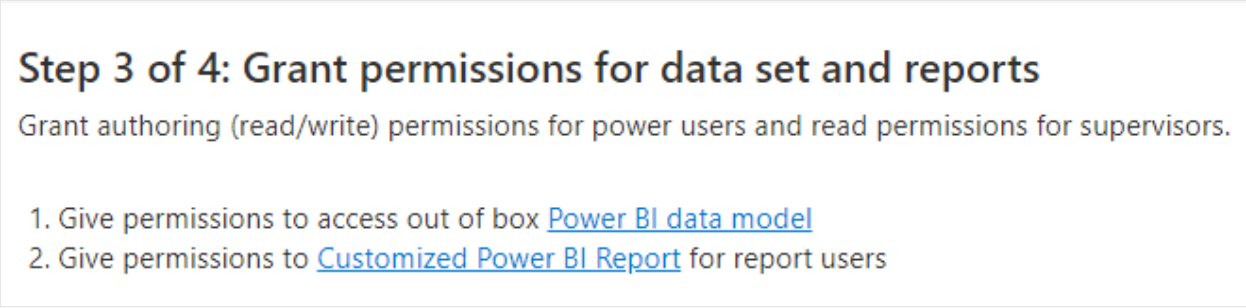
Step 2: Provision the data models

It could take up to 24 hours for the provisioning to complete. You can leave the **Settings** page and check back after a few hours. Select **Refresh** to check the provisioning status.

Step 3: Grant permissions for dataset and reports

After the report is provisioned, you must provide **Write** permissions for users who will be authoring reports in Power BI and **Read** permissions for supervisors and other consumers of the reports.

You'll need to be a **Workspace Administrator** on both managed and customer workspaces (configured on Step 1) in Power BI to complete this step. By default, the user who starts the provisioning (Step 2) will have the necessary permissions added.



Grant access to the Power BI data model

Report authors will connect to the specified data model to build custom reports. When you select the **Power BI Data model** link, the managed workspace opens up and the details of the data model are displayed. Use the **Share** dialog to provide access to users by entering their email address. More information: Share access to a dataset.

You need to:

- Provide report authors with **Allow recipients to build content with the data associated with this dataset** access.
- For report viewers like supervisors, you may choose to share the dataset without providing any additional permissions.

Grant permissions to the customized Power BI report (optional)

When you select the **Customized Power BI Report** link, the Power BI workspace where the sample reports will be provided appears in a lineage view. These reports are the copy of your out-of-the-box reports and can be edited and modified. You'll have to provide access to the workspace only if your organization plans on using these copies to develop reports.

From the lineage view, select **Access**, and provide **Contributor** access to your report authors and **Viewer** access to users who will be viewing these or any other reports built in this workspace. For more information on data permissions, go to: Manage dataset access permissions (preview). You'll have to provide these permissions only if you plan to use these reports.

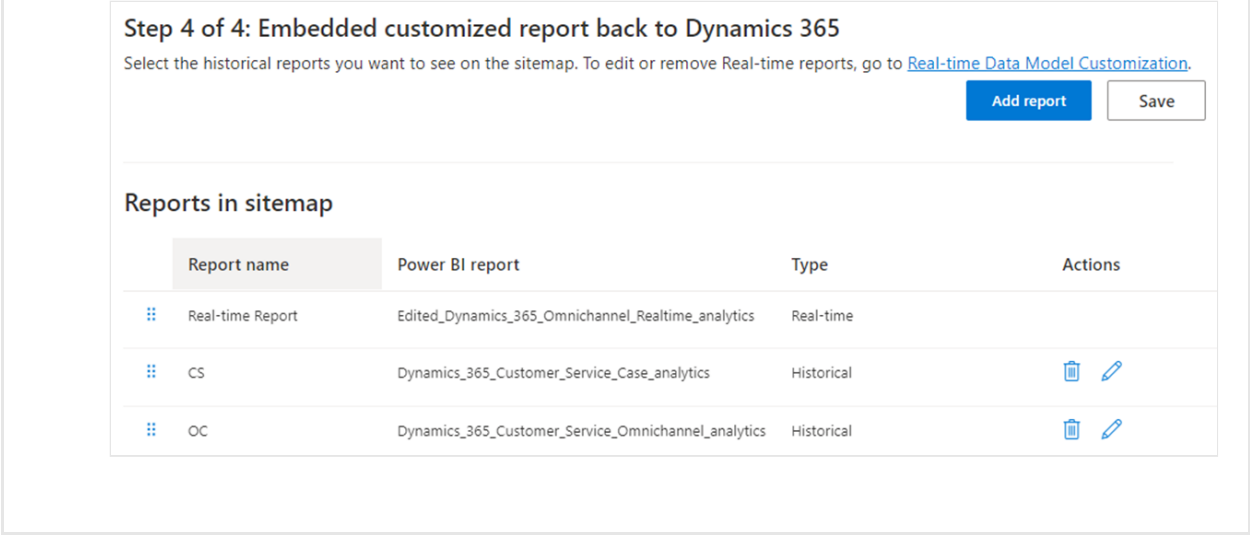
Step 4: Embed customized reports back to Dynamics 365

After your report authors have created and published the customized reports, you can allow Dynamics users to access these reports from the Customer service workspace.

1. Select the data model reports.

Historical data model customization

- From the **Embedded Power BI extensibility - Historical data model customization** page, go to Step 4.



2. Select **Add report**. The **Add report** dialog appears.
3. Enter a preferred name in the **Report name** text box.
4. From the **Select Power BI report** dropdown list, select the Power BI report in the workspace.
5. Select **Add** and **Save**.

The dropdown list is populated with the reports in the workspace configured on Step 1. The preferred report name will appear for your Dynamics users when they access the reports. You can add a maximum of 40 reports.

The customized reports site map in the Customer service workspace is shared between historical and real-time data model customization features. You'll be able to reorder the reports on both historical and real time admin pages. For both historical and real time, you'll be able to modify or delete reports added from the respective historical and real-time data model customization pages only.

See also

Customize the display of analytics reports
Introduction to Customer Service Insights
Configure Customer Service analytics and insights
Configure Customer Service Analytics dashboards in Power BI
Configure Omnichannel historical analytics

Configure case volume forecasting (preview)

Article • 07/12/2023

> **Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

Introduction

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to

inform their agents that their communications with end users may be monitored, recorded, or stored.

Customer service supervisors in your organization need to ensure that they have an adequate number of agents available to serve their customers. Overcapacity results in higher costs, while undercapacity results in longer customer wait times, which in turn can negatively impact customer satisfaction.

As an administrator, you can configure the Case forecasting report to help your supervisors plan the right level of staffing for your business based on predicted volumes of cases.

Supervisors can use the Case forecasting report in the following ways:

- Forecast upcoming case volumes based on historical traffic.
- Visualize forecasted case volumes on a daily basis for a time range up to six months, depending on how many days of cases were created in the past. This forecast can be used to plan agent resourcing and recruitment to meet future demand.
- Visualize forecasted case volumes on a 15-minute interval basis, for a time range up to six weeks depending on how many days of cases were created in the past. This forecast can be used to schedule agents to meet the near-term demand.
- Slice forecasted volumes by channel and queue.
- View a rollup of actual and forecasted volume by hourly, daily, weekly, monthly, and yearly basis.
- Automatically detect seasonality from historical traffic with the settings option to import your holiday calendar. This helps the forecasting model to accurately predict case volume during special, seasonal events.

Note

Be aware of the following when using the Case forecasting report:

- Forecasts might misstate volume estimates for many reasons, including unanticipated trends or business developments.
- The Forecast report is currently available in certain geographical locations. More information: **Regional availability and Service limits for Customer**

Service.

How case forecasting works

The Forecast report uses an AI-backed forecasting model that predicts case volumes based on historical case data. The model uses an ensemble forecasting method with seasonality support (automatic detection and custom settings) to enhance the quality of forecasting.

The report can forecast daily trends for a date range up to six months, and intraday (15-minute interval) trends for a date range up to six weeks, depending on how many days of historical data are available and used. In general, the model can forecast for a period that is half of the input date range, with the following conditions:

- For daily case volume forecasting, if the historical data time range is less than 12 months, the forecasting time range is the half of the input time range. For example, eight months of historical date range can forecast for the next four months. If the historical range equals or is more than 12 months (up to 24 months), the report forecasts for the next six months.
- For intraday (15 minutes interval) case volume forecasting, the model only analyzes the recent six weeks of historical data. The time range of forecast is half of the total input time range. For example, 12 weeks historical date range can forecast for the next six weeks (which is the maximum). Out of these 12 weeks of historical data, only the recent six weeks are analyzed to generate the forecast.

The historical data must meet the following minimum requirements for the models to generate forecasting. Otherwise, an error message is posted on the admin settings page.

- At least two weeks of historical data is available.

Key considerations to enhance forecast accuracy

We recommend the following criteria for utilizing users' data to generate accurate forecasts.

- Non-sparse data: The dataset contains information for every day, ensuring that there isn't missing or incomplete data. Each day has a recorded volume, providing a comprehensive set of observations.

- Clear weekly pattern: The data exhibits a weekly pattern, wherein the volume consistently follows a specific trend. For instance, weekends consistently have low volumes, while workdays show higher volumes, and vice versa. This pattern helps in establishing a reliable basis for forecasting.
- Volume-based accuracy: If the criteria are met, the forecast quality improves with larger volume inputs. Higher volumes of data contribute to a more accurate and robust forecast.
- Absence of level shift: Recent days and future periods don't experience any sudden or significant shifts in volume levels. This absence of sudden changes ensures that the historical patterns remain relevant and dependable for forecasting purposes.
- Longer historical data set: If all the above criteria are met, a longer history of data further improves the forecast accuracy. A greater historical data set provides a broader perspective and a more comprehensive understanding of the patterns and trends over time. With an extended history, the forecast model can capture and incorporate more variations, leading to more accurate predictions.
- Weighting recent forecast accuracy: When considering future periods, it's important to acknowledge that the accuracy of the forecast tends to be higher for more immediate timeframes. As time progresses into the future, the certainty and precision of the forecast may decrease. Therefore, the most recent forecast should be given more weight and considered to have better accuracy compared to forecasts for distant future periods.

Prerequisites

To configure the **Case forecasting (preview)** report, you must have the System Administrator role.

For users in your organization to be able to access the forecast reports, they must be part of a role that has **Read** privileges on the **msdyn_dataanalyticsreport_forecast** table. Your system administrator must assign this privilege to any role that needs access to the forecasting reports. Out of the box, the following roles already have read privileges on the Forecast table:

- CSR Manager
- Omnichannel administrator
- Omnichannel supervisor

Enable the case forecasting (preview) report

1. In the Customer Service admin center app, under **Operations**, select **Insights**. The **Insights** page is displayed.

2. Under the **Report settings** section, next to **Case forecasting (preview)**, select **Manage**. The **Case forecasting (preview)** page is displayed.

3. Toggle **Enable case forecasting** to **On**.

4. The report reflects the day on which it's enabled. If you want to choose a different day of the month for the report to be updated, in **Daily forecasting schedule**, select the day for which you want the report to refresh.

5. After the report is generated for the first time, you'll see a **Model run summary** section at the top of the page that displays the date and time on which the forecast was last created. The time reflects your time zone. If you want to set a different default time zone, do the following steps:

   a. Select the **Settings** (gear) icon in the top-right corner of the app, and then select **Personalization Settings**. The **Set Personal Options** page is displayed.

   b. In **Set the time zone you are in**, choose the time zone you want from the dropdown menu.

   c. Select **OK**.

6. If you want to change the time zone to use for forecasting, under **Time zone for daily forecasting**, select time zone you want.

7. If you want to select a particular date that the data starts from, under **Historical data start date (optional)**, choose the **Start date** you want. The latest (closest) date that the start date can be is at least two weeks back from the current date. If nothing is selected, the start date is decided based on the earliest creation date of all of your historical records, up to two years. If the start date you select is earlier than two years, only last two years of data is used.

8. If you want to specify seasonality, under **Seasonality**, select the **Use schedules from Holiday Calendar** check box. Selecting the **Holiday Calendar** link opens the **All Holiday Schedules** page, where you can create a new schedule or select an existing schedule.

9. Save your changes. If this is the first time you've enabled the forecast feature, it may take up to 24 hours until the forecasting data is ready to view in the forecast report.

See also

Forecast case and conversation volumes, and agents for conversations (preview)

Configure agents for conversations forecasting (preview)

Introduction to Customer Service Insights

Regional availability and Service limits for Customer Service

Configure agents for conversations forecasting (preview)

Article • 07/12/2023

> **Important**
>
> To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**
>
> A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.
>
> We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.
>
> Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

Introduction

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to

inform their agents that their communications with end users may be monitored, recorded, or stored.

Customer service supervisors in your organization need to ensure that they have an adequate number of agents available to serve their customers. Overcapacity results in higher costs, while under capacity results in longer customer wait times, which in turn can negatively impact customer satisfaction.

As an administrator, you can configure the Agent forecasting for conversation report to help your supervisors plan the right level of staffing for your business based on predicted volumes of conversations.

Supervisors can use the Agent forecasting for conversation report in the following ways:

- Forecast upcoming conversation volumes based on historical traffic. For conversation volume forecasting, if chatbots are enabled for your conversational channels, then the chatbot conversations that don't include a human agent are excluded from the forecast. You can then rely on the predicted conversation volumes for human agent staffing.
- Forecast agent demand to meet the forecasted conversation volume, based on business requirements, such as service level agreement, shrinkage, and concurrency.
- Visualize forecasted conversation volumes and agent demand on a daily basis, for a time range up to six months depending on how many days of cases were created in the past. This forecast can be used to plan agent resourcing and recruitment, to meet future demand.
- Visualize forecasted conversation volumes and agent demand on a 15-minute interval basis, for a time range up to 6 weeks depending on how many days of cases were created in the past. This forecast can be used to schedule agents to meet the near-term demand.
- Slice forecasted volumes and agent demand by channel and queue.
- View rollup of actual and forecasted volume by hourly, daily, weekly, monthly and yearly basis. For agent demand report, option to select the type of rollup from Maximum, Minimum, Average and Sum.
- Automatically detect seasonality from historical traffic with the settings option to import your holiday calendar. This automatic detection helps the forecasting model to accurately predict case or conversation volume during special, seasonal events.

> **Note**
>
> Be aware of the following when using the Forecast report:
>
> - Forecasts might misstate volume estimates for many reasons, including unanticipated trends or business developments.
> - The agent forecasting for conversation report is currently available in certain geographical locations. More information: **Regional availability and Service limits for Customer Service**.

How agent forecasting for conversation works

The forecast report for conversations uses an AI-backed forecasting model to predict conversation volumes based on historical conversation data. The model uses ensemble forecasting methodology with seasonality support (automatic detection and custom settings) to enhance the quality of forecasting. The forecast report for agents for conversations uses a statistical model to calculate the agent demand from the forecasted volumes.

The report can forecast daily trends for a date range up to six months, and intra day (15-minute interval) trends for a date range up to six weeks, depending on how many days of historical data are available and used. In general, the model can forecast for a period that is half of the input date range, with the following conditions:

- For the daily conversation volume and agent demand forecast, if the historical data time range is less than 12 months, the forecasting time range is the half of the input time range. For example, eight months of historical date range can forecast for the next four months. If the historical range equals or is more than 12 months (up to 24 months), the report forecasts for the next six months.
- For the intraday (15-minute interval) conversation volume and agent demand forecast, the model only analyzes the recent six weeks of historical data. The time range of forecast is half of the total input time range. For example, 12 weeks historical date range can forecast for the next six weeks (which is the maximum). Out of these 12 weeks of historical data, only the recent six weeks are analyzed to generate the forecast.

The historical data must meet the following minimum requirements for the models to generate forecasting. Otherwise, an error message is posted on the admin settings page.

- At least two weeks of historical data is available.

Key considerations to enhance forecast accuracy

We recommend the following criteria for utilizing users' data to generate accurate forecasts.

- Non-sparse data: The dataset contains information for every day, ensuring that there isn't missing or incomplete data. Each day has a recorded volume, providing a comprehensive set of observations.
- Clear weekly pattern: The data exhibits a weekly pattern, wherein the volume consistently follows a specific trend. For instance, weekends consistently have low volumes, while workdays show higher volumes, and vice versa. This pattern helps in establishing a reliable basis for forecasting.
- Volume-based accuracy: If the criteria are met, the forecast quality improves with larger volume inputs. Higher volumes of data contribute to a more accurate and robust forecast.
- Absence of level shift: Recent days and future periods don't experience any sudden or significant shifts in volume levels. This absence of sudden changes ensures that the historical patterns remain relevant and dependable for forecasting purposes.
- Longer historical data set: If all the above criteria are met, a longer history of data further improves the forecast accuracy. A greater historical data set provides a broader perspective and a more comprehensive understanding of the patterns and trends over time. With an extended history, the forecast model can capture and incorporate more variations, leading to more accurate predictions.
- Weighting recent forecast accuracy: When considering future periods, it's important to acknowledge that the accuracy of the forecast tends to be higher for more immediate timeframes. As time progresses into the future, the certainty and precision of the forecast may decrease. Therefore, the most recent forecast should be given more weight and considered to have better accuracy compared to forecasts for distant future periods.

Prerequisites

To configure the **Agent forecasting for conversation (preview)** report, you must have the system administrator role.

For users in your organization to be able to access the forecast reports, they must be part of a role that has **Read** privileges on the **msdyn_dataanalyticsreport_forecast** table. Your system administrator must assign this privilege to any role that needs access to the

forecasting reports. Out of the box, the following roles already have read privileges on the Forecast table:

- CSR Manager
- Omnichannel administrator
- Omnichannel supervisor

Enable the Agent forecasting for conversation (preview) reports

1. In the Customer Service admin center app, under **Operations**, select **Insights**. The **Insights** page is displayed.

2. Under the **Report settings** section, next to **Agent forecasting for conversation (preview)**, select **Manage**. The **Agent forecasting for conversation (preview)** page is displayed.

3. Toggle **Enable agent capacity forecasting** to **On**.

4. The report reflects the day on which it's enabled. If you want to choose a different day of the month for the report to be updated, in **Daily forecasting schedule**, select the day for which you want the report to refresh.

5. After the report is generated for the first time, you'll see a **Model run summary** section at the top of the page that displays the date and time on which the forecast was last created. The time reflects your time zone. If you want to set a different default time zone, do the following steps:

   a. Select the **Settings** (gear) icon in the top-right corner of the app, and then select **Personalization Settings**. The **Set Personal Options** page is displayed.

   b. In **Set the time zone you are in**, choose the time zone you want from the dropdown menu.

   c. Select **OK**.

6. If you want to change the time zone to use for forecasting, in **Time zone for daily forecasting**, select time zone you want.

7. If you want to select a particular date that the data starts from, under **Historical data start date (optional)**, choose the **Start date** you want. The latest (closest) date that the start date can be is at least two weeks back from the current date. If nothing is selected, the start date is decided based on the earliest creation date of

all of your historical records, up to two years. If the start date you select is earlier than two years, only last two years of data is used.

8. If you want to specify seasonality, under **Seasonality**, select the **Use schedules from Holiday Calendar** check box. Selecting the **Holiday Calendar** link opens the **All Holiday Schedules** page, where you can create a new schedule or select an existing schedule.

9. Under **Global Forecasting configuration** specify the following settings at the global level to apply to all channels. Some default values are provided as a suggestion to get you started, but you may want to change them to meet the needs of your organization.

    - **Required Service Level (%)**: The percentage of the conversations needed to meet the target answer time. For example, if you set your required service level percentage to 80 and your target answer time to 77, it indicates that you want 80 percent of your conversations to be answered in 77 seconds or less.
    - **Target Answer Time (Seconds)**: The number of seconds in which you want your agents to answer their conversations.
    - **Shrinkage (%)**: The percentage of time agents are unavailable to handle conversations. If you increase this number, the percentage of time that the agents are unavailable goes up, which means you would need more agents to meet the service-level agreement.
    - **Concurrency (#)**: The number of simultaneous interactions per agent. For voice calls, this value should be set to one. For chats and messaging channels, this value can be set as desired.

10. (Optional) If you want to override the values that are set in the **Global Forecasting configuration** for specific channels, you can use the settings in **Override Channel Forecasting configuration** to set values for each channel that's available in your organization. Any settings you don't change in the override remain as set at the global level. To specify overrides for one or more channels, do the following:

    - Select the channels you want to specify overrides for in the **Select channels to override configuration** dropdown list. Once selected, click on the **Add to override** button.
    - An override section for each channel that you selected is added to the configuration page. Specify the overrides for the channel. You do not need to override all values. Any value that you don't override uses the value specified in the **Global Forecasting configuration** section.

- To remove a channel override, click on the **Remove this channel override** link in the override section for that channel. You'll be prompted to confirm the remove action.

An example of when an override might be useful is if you have both voice and chat channels. The **Concurrency (#)** setting in **Global Forecasting configuration** would be set to one for the voice channel, but then you could use the **Live Chat-override** setting to change the chat concurrency to a higher frequency, such as three.

11. Save your changes. If this is the first time you've enabled the forecast feature, it may take up to 24 hours until the forecasting data is ready to view in the forecast report.

See also

Forecast case and conversation volumes, and agents for conversations (preview)
Configure case forecasting (preview)
Introduction to Customer Service Insights
Regional availability and Service limits for Customer Service

Configure AI topic clustering for cases

Article • 08/26/2022

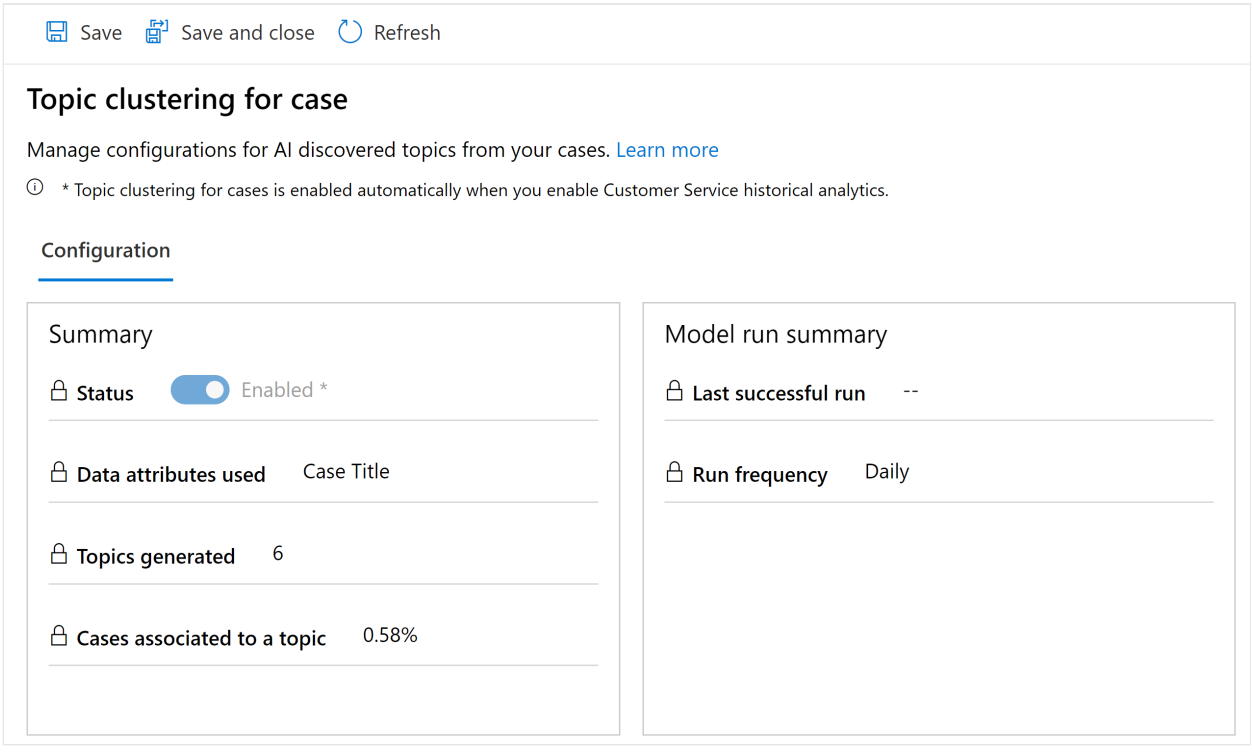
Customer Service Insights uses AI to give you insights into your customer service data by grouping semantically related cases and generating a topic. New cases that match the generated topic will be automatically added to the topic group. This can help you identify areas for improvement that can have the greatest impact on system performance.

The AI-driven technology empowers informed decision-making about how to improve resolution rates, reduce wait times, and decrease customer service costs. You can use case resolution insights, backlog trends, and historical comparisons to evaluate agent performance and business impact, and address inefficiencies in your system.

Enable topic clustering for cases

Topic clustering is enabled by default when you enable historical analytics. To enable historical analytics, see Configure Customer Service historical analytics.

Summary and Model run summary views

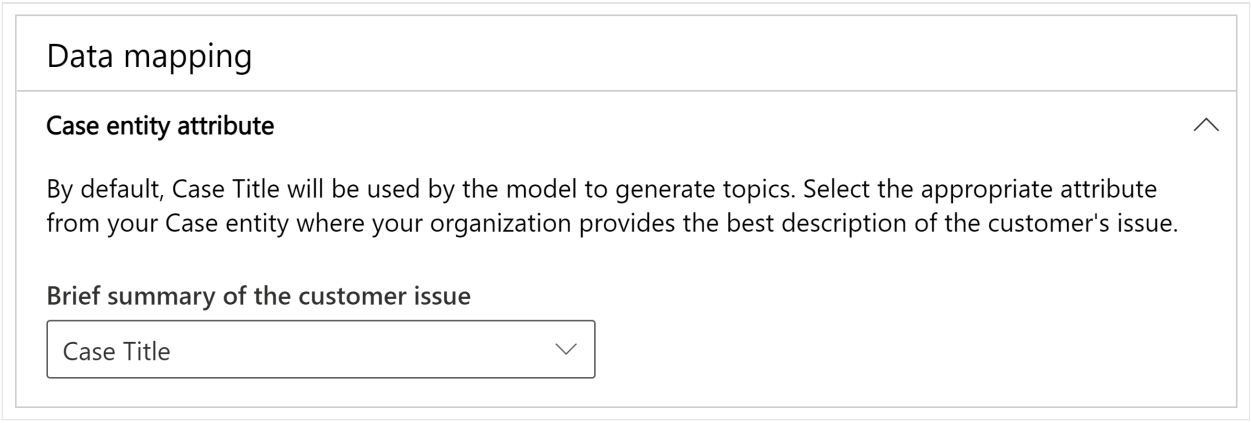


The Summary and Model run summary views provide key information about how the topic model is operating.

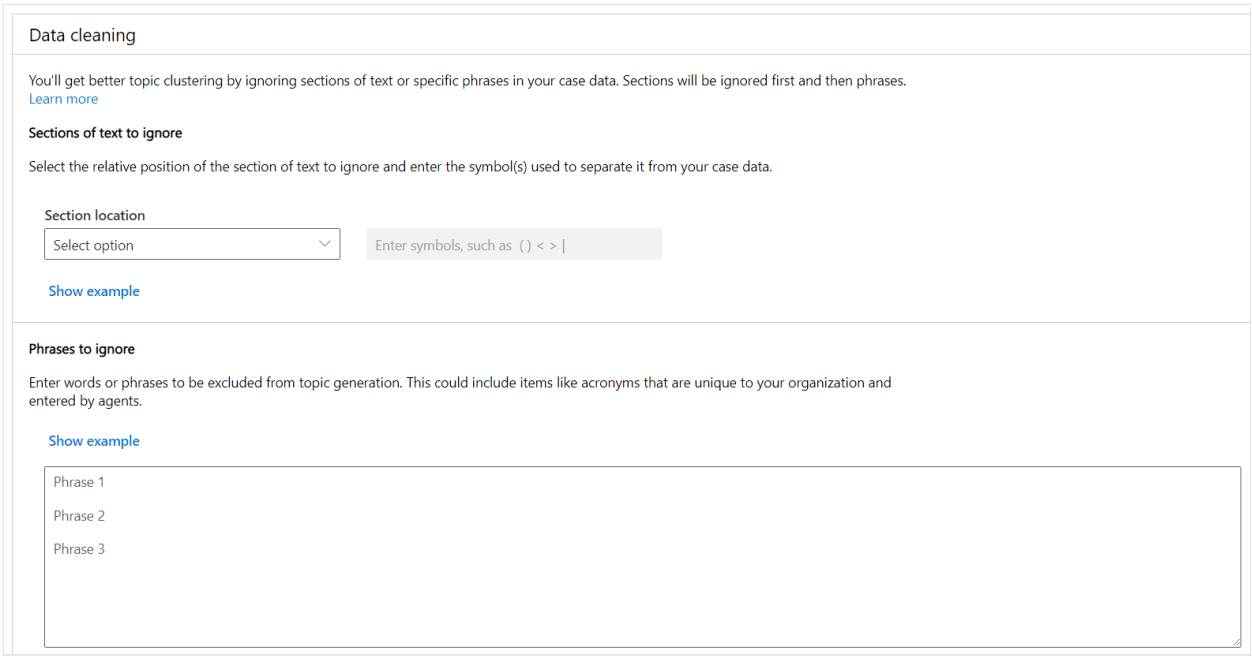
View	Description
Status	Whether the feature is enabled or disabled.
Data attributes used	Which text field from the Case entity is used for topic generation.
Topics generated	The total number of topics generated by the model.
Cases associated to a topic	The percentage of cases that were considered for topic generation and classified to a topic.
Last successful run	Timestamp of the last time new cases were processed.
Run frequency	The cadence in which new cases are processed and tagged with topics.

Data mapping

Data mapping enables you to choose the text field that the agents in your organization will most likely use to describe the reason why a customer reached out to support. By default, the Case Title attribute is used. The other attributes available to you are Serial Number, Description, and Case Title.



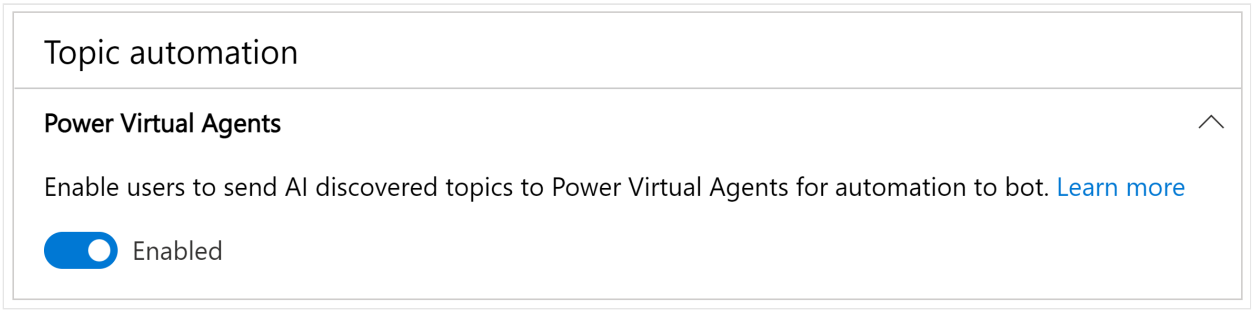
Improve data quality by cleaning support case data



The AI Insights charts displayed on the Customer Service Insights dashboards are generated by applying language understanding technology to the titles of support cases. However, the results can be misleading if the titles include extraneous information such as product name, case status, or ticket number tags. You can improve the quality of the results displayed in AI Insights charts by specifying Data Cleaning settings to disregard tags in titles when they are grouped into topics, as well as specific phrases that should be ignored. Note that when you choose to apply both options, sections are ignored first, followed by phrases.

Enable topic automation for Power Virtual Agents

AI discovered topics in Customer Service Historical Analytics are often prime candidates as topics for automation in Power Virtual Agents bots. If Power Virtual Agents is available in the region that your Customer Service organization is in, then the feature can be enabled by switching the **Disabled** toggle to **Enabled**.



> **Note**
>
> Topic automation to Power Virtual Agents bot is currently not supported in Government Community Cloud.

Language availability for topics

The topics capability in the Customer Service historical analytics reports comes with a natural language understanding model that can understand the text semantics and intent in the following languages:

- English
- French
- German
- Italian
- Japanese
- Portuguese
- Simplified Chinese
- Spanish

> **Note**
>
> While topic discovery is not prevented and still possible in languages that are not listed above, there may be differences in experience for users who leverage topics in unsupported languages.

See also

Introduction to Customer Service analytics and insights
Dashboard overview
Topics Dashboard

Enable AI suggestions for similar cases and knowledge articles

Article • 05/18/2023

With the use of AI, suggestions about similar cases that were previously resolved successfully help agents find the right solutions quickly, increase their productivity, and provide better and faster service to customers.

The key highlights of the feature are as follows:

- AI-driven case and knowledge article suggestions that are based on case context and historical success rate.
- Secondary actions that agents can take, such as collaborating with an expert, after a similar case has been found.
- Capability of the AI model to process up to 1 million of the most recent cases for listing them at runtime.

> **Note**
>
> The AI suggestions feature is currently available in a few geographical locations. More information: **Regional availability and Service limits for Customer Service**.

How AI suggestions for similar cases and knowledge articles work

The AI suggestions are displayed in smart assist, an intelligent assistant that provides real-time recommendations to agents to help them take action during their interactions with customers. After the productivity pane is enabled in Customer Service workspace or Omnichannel for Customer Service, the smart assist cards with suggestions appear on the productivity pane.

The AI suggestions use a set of pre-trained natural language understanding models. These models are designed to help agents find relevant knowledge articles or similar cases quickly, based on the context of active cases or ongoing conversations.

The AI models work as follows:

- Knowledge articles and similar cases can be suggested based on the semantic meaning in case context and knowledge article content.

- The model pre-processes published knowledge articles and resolved cases every day to prepare suggestion candidates. For the first time preprocessing, up to 1,500 published articles and 15,000 recently resolved cases will be processed. After, newly published articles and resolved cases will be processed up to the daily limit. Over time, accumulatively, up to 1 million of the latest resolved cases will be processed to serve suggestions.
- After a case is created or updated, or during an ongoing conversation, the model finds out matching knowledge articles and similar cases from suggestion candidates.
- A brief summary is auto-generated for each pre-processed knowledge article, based on its content. When the system suggests a knowledge article, both the article title and auto-generated summary are surfaced to agents. This data can help agents get a better idea about an article before they click through it.
- In addition to the suggestions, agents can also tell why an article or similar case is suggested through a list of key phrases that are auto-extracted from knowledge articles and cases. These key phrases highlight the relevance between a suggestion and an active case or an ongoing conversation in addition to the confidence score (a percentage number that indicates the degree to which an article or similar case matches with the active case).
- During an ongoing conversation, for the first three messages sent by the customer, the AI suggestions are triggered for each message. After these first three customer messages, AI suggestions are triggered for every third customer message. The AI suggestions are based on the context described in the last 18 messages.

> ⓘ **Note**
>
> - After you enable the settings, it might take up to 24 hours for the models to process data and complete the first time setup.
> - After you enable or disable the settings, they'll be in place only after agents refresh or reopen their browser; they won't appear in the currently active sessions or on session switch.

Language support for AI suggestions

AI suggestions for similar cases and knowledge articles are now supported in the following languages:

- Dutch
- English

- French
- German
- Italian
- Japanese
- Spanish

After an agent opens a case or accepts a conversation, smart assist checks the language from the following sources:

- Whether the language selected in the language settings is supported.
- Whether the language that the AI has detected in the case or conversation that the agent accepts matches the language settings.

If the language verification passes, the suggestions are displayed in the language used in the case or the conversation. Suggestions aren't displayed if the language doesn't match or isn't supported. In such cases, the agent should update the settings to use supported languages. The language settings used in AI suggestions are listed as follows:

- For similar case suggestions, the language selected in the user's **User Interface Language** settings is used to display similar cases and knowledge article suggestions.
- For knowledge article suggestions, smart assist first checks for the language that's set in the **Knowledge Personalization** settings. If no language setting is found, the user's **User Interface Language** setting is used to display knowledge article suggestions. More information: Personalize your knowledge search article filters.

Prerequisites

Make sure that the following requirements are met:

- Customer Service workspace is installed and accessible. More information: Customer Service workspace
- The productivity pane is enabled. By default, the productivity pane is enabled out of the box. More information: Enable productivity pane.
- The System Administrator role is granted.
- The workflow processes used by the AI model and AI configuration entities are in the activated status. More information: Workflow processes.
- If administration mode is enabled, make sure that background operations are also enabled. More information: Administration Mode.
- For the AI suggestions to work, customer-managed keys should be disabled.

Enable AI suggestions for similar cases

> **Note**
>
> AI suggestions for similar cases is enabled out of the box.

You can enable AI suggestions for similar cases in the Customer Service admin center, Omnichannel admin center, or Customer Service Hub app.

1. Go to one of the apps, and then perform the following steps.

   Customer Service admin center

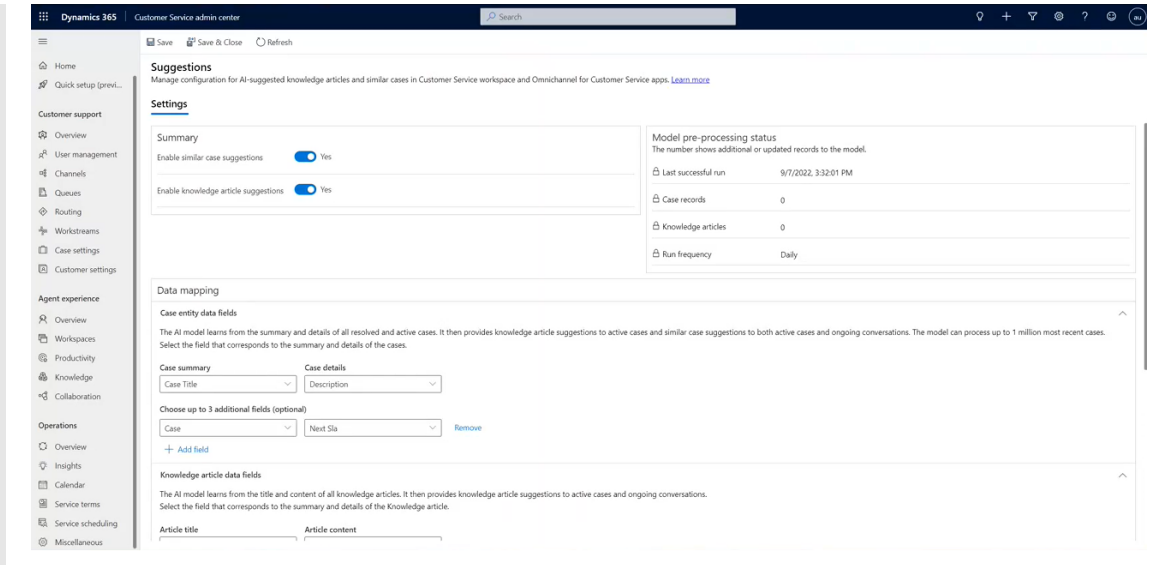
   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Suggestions for agents** section, select **Manage**.

   The **Suggestions** page is displayed.

2. In the **Settings** > **Summary** area, set the **Enable similar case suggestions** toggle to **Yes**.

3. In the **Data mapping** > **Case entity data fields** area, select values for the **Case summary** and **Case details** boxes respectively, if you don't want to use **Case Title** and **Description** that are set by default. You can choose up to three more fields for the case suggestion model to use to find similar cases. For example, you can look at cases with a similar age, cases owned by a particular team, and so forth. The AI model uses the data that corresponds to the selected boxes to understand the case context to provide similar case suggestions.

   > **Note**
   >
   > We recommend that you use text fields with plain text because suggestions might not be generated for text fields that are enabled for rich text format.



4. Select **Save**.

Enable AI suggestions for knowledge articles

> **Note**
>
> AI suggestions for knowledge articles is enabled out of the box.

You can enable AI suggestions for knowledge articles in the Customer Service admin center, Omnichannel admin center, or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Suggestions for agents** section, select **Manage**.

   The **Suggestions** page is displayed.

2. In the **Summary** area, set the **Enable knowledge article suggestions** toggle to **Yes**.

3. In the **Data mapping** > **Knowledge article data fields** area, ensure that **KB articles** is selected for **Article entity**, and **Title** and **Content** are selected in the **Article title** and **Article content** boxes, respectively. You can choose three more fields for the model to find similar knowledge articles, such as article keywords, description, and so forth. The selected options are used by the AI model to understand and find a

good match for a case or conversation. Article content is used by the AI model to generate a brief article summary that's displayed to the agent at runtime.

4. Select **Save**.

Model preprocessing rules

You can use model preprocessing rules to limit the pre-processed cases that the AI model will suggest to your agents. You can choose from a variety of conditions, such as sentiment value, associated with the resolved case, and so forth.

You can also apply model preprocessing rules to knowledge articles to limit the suggestions to knowledge articles based on things such as keywords, language, the number of views on the knowledge article, and so forth.

Model preprocessing status

The **Model preprocessing status** area displays the following metadata pertaining to the AI processing. The run frequency is set out of the box. Every day, the model pre-processes newly published or updated knowledge articles and resolved or updated cases to prepare the candidates for suggestions.

- **Last successful run**: Displays the date and time the model was last run.
- **Case records**: Displays the number of new or updated resolved case records that were processed.
- **Knowledge articles**: Displays the number of new or updated published knowledge articles that were processed.
- **Run frequency**: Displays the frequency that has been set for the model to run.

Workflow processes

The AI model and AI configuration entities use the following workflow processes. Make sure these processes are in the activated status. By default, these processes are activated:

- IsPaiEnabled
- Predict
- PredictionSchema
- Train
- QuickTest
- BatchPrediction

- ScheduleTraining
- SchedulePrediction
- ScheduleRetrain
- UnschedulePrediction
- UnscheduleTraining
- CancelTraining
- PublishAIConfiguration
- UnpublishAIConfiguration

Service protection limits for AI suggestions

AI suggestions for Case and Knowledge became available as of October 2020. We're introducing service protection limits on these capabilities to maintain a consistent quality of service for all our customers, but there's no penalty if customers exceed predefined limits. Over time, Microsoft might adjust these limits in keeping with customer usage patterns and provide options for customers with high usage scenarios and patterns to purchase more capacity in a manner minimally disruptive to those customers.

The service protection limits for AI suggestions are defined in the following table. The total limits are pooled at the tenant level based on the number of Customer Service Enterprise user licenses that are available in the tenant.

Area	Limits	Notes
AI suggestions for active cases	30 cases/month per user license	Each user license adds 30 active cases, where agents can get AI-suggested knowledge articles and similar cases in real time.
AI suggestions for conversations	150 conversations/month per user license	Each user license adds 150 omnichannel conversations, where agents can get AI-suggested knowledge articles and similar cases in real time.

See also

View AI-suggested similar cases and knowledge articles for active cases
View smart assist suggestions for knowledge articles and similar cases using AI for ongoing conversations
FAQ on AI-suggested cases and knowledge articles
Create a new similarity rule to view similar cases

Configure AI suggestions for article keywords and description

Article • 04/04/2022

Correct metadata helps to locate articles that users search for. When authors create or update knowledge articles, AI suggestions for article keywords and descriptions can help them select the right metadata, thereby improving their productivity.

The key highlights of the AI suggestions feature are as follows:

- Enable authors by suggesting keywords and description based on the article content stored in the built-in knowledge article entity.
- Enable admins to select the source data (text only) fields that the AI model will use; the default fields are **Title** and **Content**.

> **Note**
>
> The AI suggestions feature is currently available only in specific geographical locations. More information: **Regional availability and service limits for Customer Service**.

How AI suggestions for article keywords and descriptions work

The **View suggested keywords and description** link appears in the default knowledge article form for authors when the article content field is updated and the knowledge article is saved. When authors select the link, it displays a dialog with suggested keywords and a description.

If you have a custom form, you can add the **View suggested keywords and description** link only to the knowledge article entity. More information: Enable AI suggestions for article keywords and description in a custom form

The AI model works as follows:

- The text values from selected source data fields in **Settings** are sent to the AI model to generate suggestions. By default, the source data fields are **Title** and **Content**.

- The model takes the first 2,200 characters to generate suggestions. To get good suggestions, we recommend that authors describe the problem to be solved within the first 2,200 characters in their articles.
- Knowledge article keywords and a description are then suggested based on the knowledge article title and content, and are displayed in the **View suggested keywords and description** dialog.

Language support for article keywords and description suggestions

AI suggestions for article keywords and description are supported in the following languages:

- Dutch
- English
- French
- German
- Italian
- Japanese
- Spanish

The language used in AI-generated suggestions is based on the language that the author has selected in the article record. An author can specify the language for an article on the **Summary** tab of the knowledge article form.

Prerequisites

Ensure to meet the following requirements:

- You have the System Administrator role.
- Authors have **Read** access to the **Keywords Description Suggestion Setting** custom entity.

Enable AI suggestions for article keywords and description

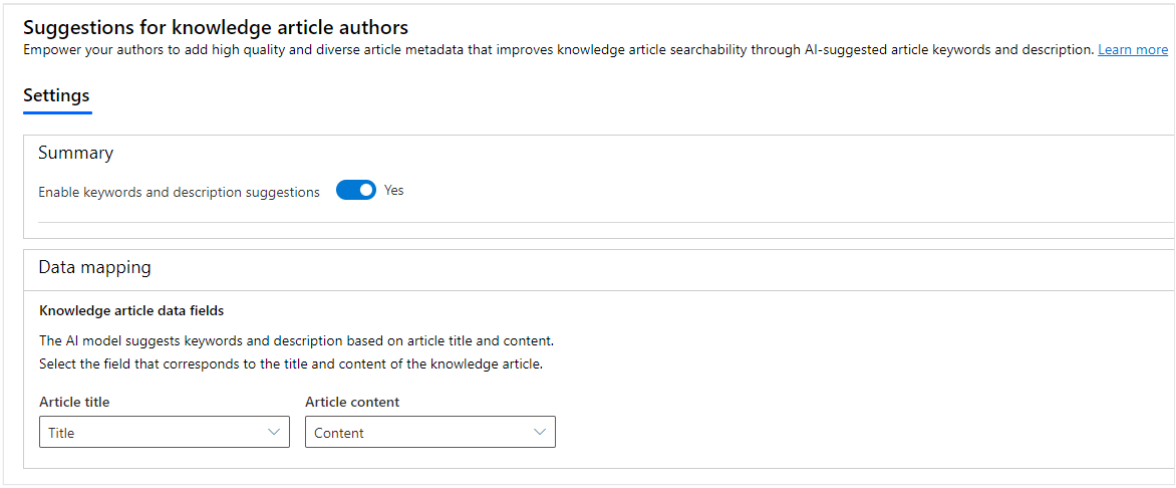
You can enable AI suggestions for article keywords and description in the Customer Service admin center or Customer Service Hub app by performing the following steps:

1. Go to the **Insights** page.

Customer Service admin center

- In the site map, select **Insights** in **Operations**. The **Insights** page appears.

2. On the Insights page, in the **Suggestions for knowledge article authors** section, select **Manage**. The **Suggestions for knowledge article authors** page appears.
3. On the **Settings** tab in the **Summary** area, set the **Enable keywords and description suggestions** toggle to **Yes**. By default, the model is based on the **Title** and **Content** values specified in the **Data mapping** area in **Knowledge article data fields**.
4. Optional: Change the values for **Article title** and **Article content** if you don't want the model to use the default values. The AI model will use the data that corresponds to the values you select.
5. Select **Save**.



Enable AI suggestions for article keywords and description in a custom form

1. In Dynamics 365, go to **Customizations** in **Advanced Settings**.
2. Select **Customize the System** to open the default solution.
3. From the **Solution: Default Solution** navigation pane, select **Components** > **Entities** > **Knowledge Article** > **Forms**.
4. Select the form that you want to customize.

5. From **Field Explorer**, select **Keywords and Description Suggestion control** and add it to the form.
6. Select **Keywords and Description Suggestion control** in the form and then select **Change Properties** on the ribbon.
7. On the **Field Properties** dialog, go to the **Controls** tab, and select **Add Control**.
8. On the **Add Control** dialog, select **Knowledge Suggestion Section Control** > **Add**.
9. On the **Field Properties** dialog, **Controls** tab, select **Web**, **Phone**, and **Tablet** for **Knowledge Suggestion Section Control**.
10. Select **OK**.
11. Select **Save** and **Publish**.

See also

Create and manage knowledge articles
Work with knowledge articles
View AI-suggested similar cases and knowledge articles for active cases
View smart assist suggestions for knowledge articles and similar cases using AI for ongoing conversations
FAQs on AI suggestions for cases and knowledge articles
Create a new similarity rule to view similar cases

Configure AI topic clustering for conversations

Article • 08/26/2022

Customer Service Insights uses AI to give you insights into your customer service data by grouping semantically related conversations and generating a topic. New incoming conversations that match this topic will be automatically added to the topic group. This can help you identify areas for improvement that can have the greatest impact on system performance.

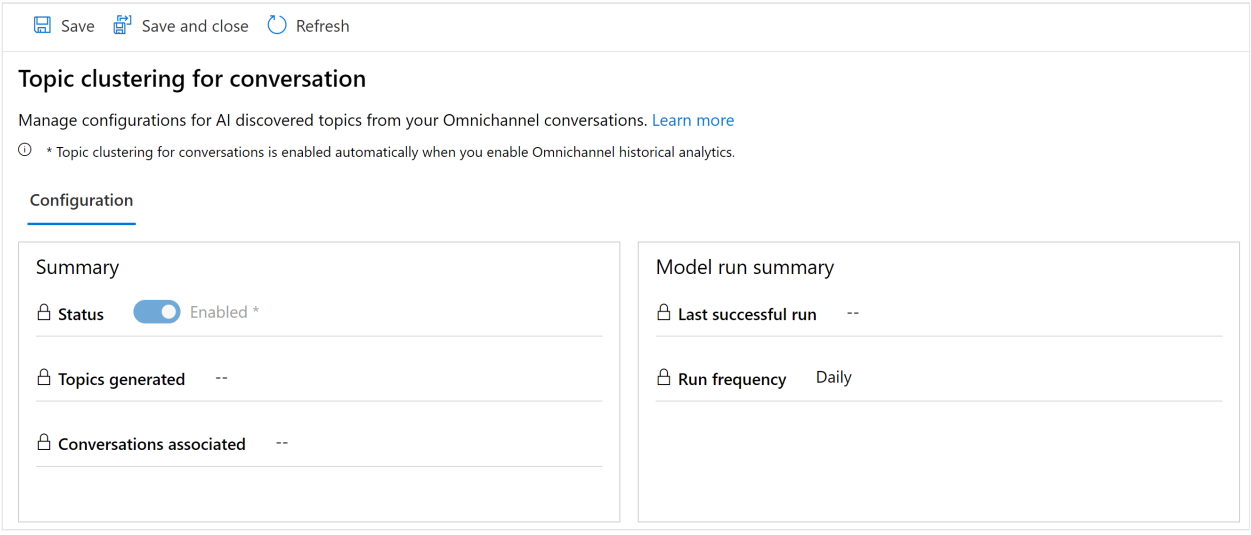
The AI-driven technology empowers informed decision-making about how to improve resolution rates, reduce wait times, and decrease customer service costs. You can use case resolution insights, backlog trends, and historical comparisons to evaluate agent performance and business impact, and address inefficiencies in your system.

Enable topic clustering for conversations

Topic clustering is enabled by default when you enable historical analytics. To enable historical analytics, see Configure Omnichannel historical analytics reports

Summary and Model Run Summary Views

The Summary and Model Run Summary views provide key information about how the topic model is operating.

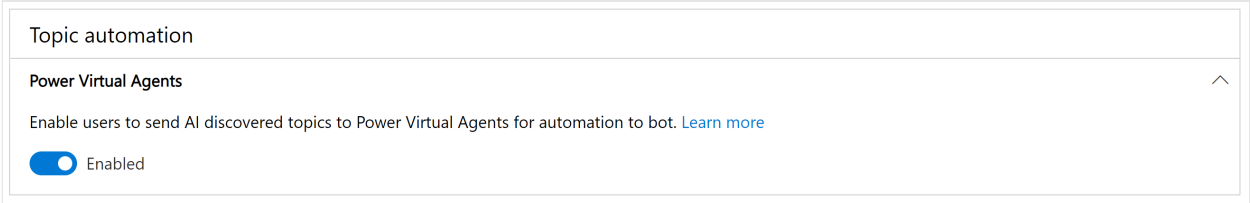


View	Description
Status	Whether the feature is enabled or not.

View	Description
Topics generated	Total number of topics generated by the model.
Conversations associated	The percentage of conversations that were considered for topic generation and classified to a topic.
Last successful run	Time stamp of the last time new cases were processed.
Run frequency	The cadence in which cases are processed and tagged with topics.

Automate topics to Power Virtual Agents bots

AI discovered topics in Omnichannel historical analytics are often prime candidates as topics for automation in Power Virtual Agents bots. If Power Virtual Agents is available in the region that your Customer Service organization is in, the feature can be enabled by switching the **Disabled** toggle to **Enabled**.



> **Note**
>
> Topic automation to Power Virtual Agents bot isn't available in Government Community Cloud.

Language availability for topics

The topics capability in the Omnichannel historical analytics reports comes with a natural language understanding model that can understand the text semantics and intent in the following languages:

- English
- French
- German
- Italian
- Japanese
- Portuguese
- Simplified Chinese

- Spanish

See also

Omnichannel Conversation Dashboard
Topics Dashboard

Analyze real-time customer sentiment

Article • 04/13/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

> **Note**
>
> Supervisor and agent sentiment notifications are not available in Omnichannel for Customer Service on Unified Service Desk.

Sentiment analysis settings in Omnichannel for Customer Service provide agents and supervisors with real-time insight regarding how customers are interacting with agents during chat sessions.

Sentiment analysis

To let agents and supervisors see the customer's satisfaction levels instantly while communicating with the customer, you need to enable sentiment analysis.

> **Note**
>
> Sentiment analysis is enabled by default.

Enable sentiment analysis

You can enable the sentiment analysis feature in the Customer Service admin center or Omnichannel admin center app.

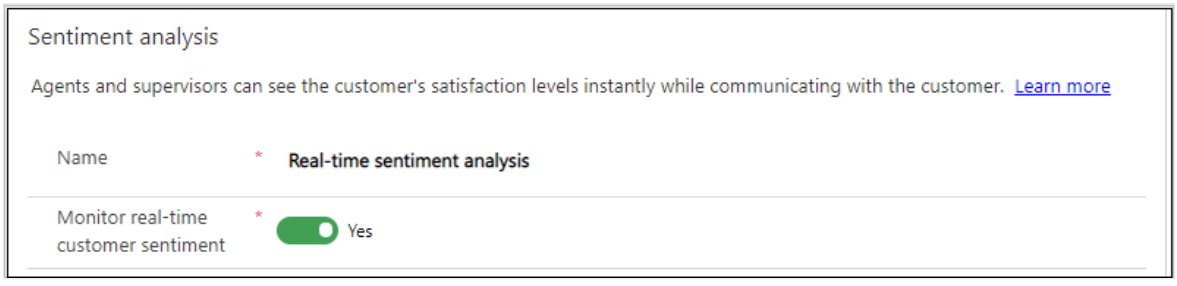
1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Insights** in **Operations**. The **Insights** page appears.
   b. In the **Sentiment analysis** section, select **Manage**.

   The **Sentiment analysis** page is displayed.

2. In the **Sentiment analysis** section, set the **Monitor real-time customer sentiment** toggle to **Yes**, and then select **Save**.



After you enable real-time customer sentiment, you can view scores in the Omnichannel Insights dashboards.

Agent settings

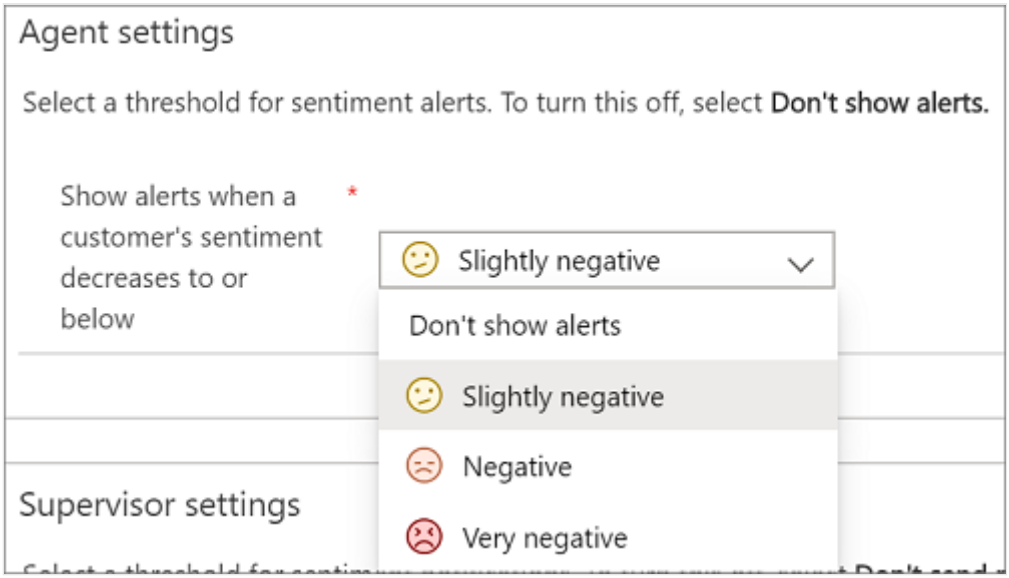
Agents can view the customer sentiment in the communication panel for a conversation session that is active and in focus. For a session that is not in focus, the alert is shown on the session panel.

You can show alerts to the agents when a customer's sentiment decreases to or below a particular value. You can set the customer's sentiment to any of the following values:

- Don't show alerts
- Slightly negative
- Negative
- Very negative

For example, you set the threshold value as **Slightly negative**. When the customer's sentiment reaches **Slightly negative** or any other sentiment value below this, an alert is displayed to the agent.

1. Navigate to the **Sentiment analysis** page.
2. In the **Agent settings** section, select a value from the **Show alerts when a customer's sentiment decreases to or below** list. The options are:
    - Don't show alerts
    - Slightly negative
    - Negative
    - Very negative



To turn off agent alerts, select **Don't show alerts**.

Supervisor settings

Supervisors can use the **Omnichannel Ongoing Conversations** dashboard to view customer sentiment in real time during conversations between customers and agents.

You can show notifications to the supervisors when a customer's sentiment decreases to a particular value or below it. The supervisor must be assigned to the queue to receive

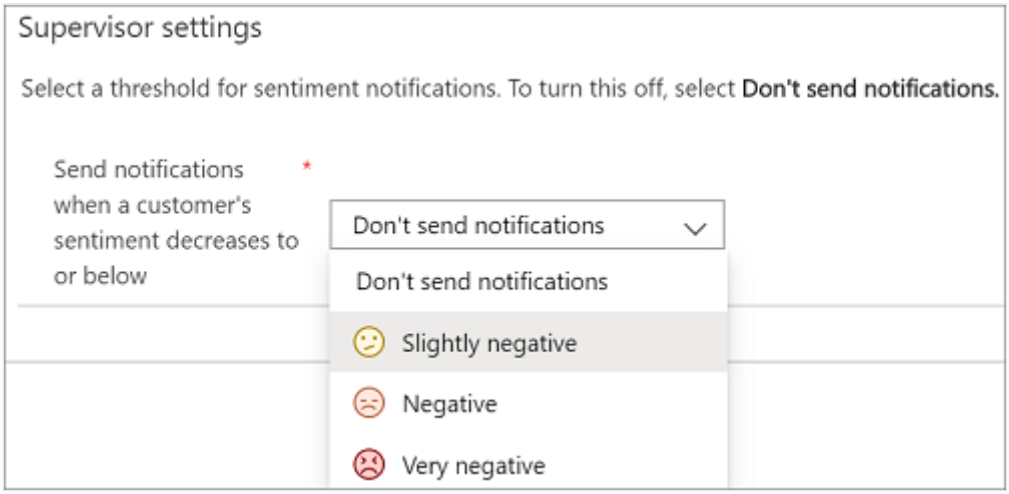
sentiment notifications.

You can set the sentiment threshold to any of the following values:

- Don't show notifications
- Slightly negative
- Negative
- Very negative

For example, you set the threshold value as **Slightly negative**. When the customer's sentiment reaches **Slightly negative** or any other sentiment value below this, a notification is displayed to the supervisor.

1. Navigate to the **Sentiment analysis** page.
2. In the **Supervisor settings** section, select a value from the **Send notifications when a customer's sentiment decreases to or below** list. The options are:
    - Don't send notifications
    - Slightly negative
    - Negative
    - Very negative



To turn off supervisor notifications, select **Don't send notifications**.

Multilingual sentiment

Multilingual sentiment scoring is enabled by default. Conversations in more than 40 languages are scored. The languages listed in the following table are supported in the analytics features.

Arabic	German	Portuguese
Bulgarian	Greek	Romanian

Chinese (Hong Kong SAR)	Hebrew	Russian
Catalan	Hindi	Serbian (Cyrillic)
Chinese Simplified	Hungarian	Serbian (Latin)
Chinese Traditional	Indonesian	Slovak
Croatian	Italian	Slovenian
Czech	Japanese	Spanish
Danish	Korean	Swedish
Dutch	Latvian	Thai
English	Lithuanian	Turkish
Estonian	Malay	Ukrainian
Finnish	Norwegian	Vietnamese
French	Polish	

> **Note**
>
> For languages supported in the product user interface (UI), see **Language availability**.

See also

Monitor, assign, and transfer conversations

Overview of Omnichannel real-time analytics dashboard

Article • 10/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. It isn't intended to be used, and should **not** be used, to make decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements.
>
> Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, including laws that are related to accessing individual employee analytics, and monitoring, recording, and storing communications with users. As part of this compliance, customers must adequately notify users that their communications with agents might be monitored, recorded, or stored. As required by applicable laws, customers must also obtain consent from users before they use this feature with them. In addition, customers are encouraged to have a mechanism in place to inform their agents that their communications with users might be monitored, recorded, or stored.

In the digital contact center world, supervisors must be able to react to events by optimizing the allocation of agents in real time to provide quick support and boost customer satisfaction. Such events include an increase in the volume of incoming customer interactions, longer call lengths, and agent absenteeism. By providing visibility into overall support performance, real-time reporting helps supervisors monitor key operational metrics, make course corrections at the appropriate time, and keep service levels high.

The real-time analytics reports provide information about the health and key performance indicators (KPIs) for your organization. They reflect the current situation in the contact center as supervisors oversee agents who handle customer conversations that come in through multiple channels. You can change the visual display of the reports and save your personalized views as bookmarks.

As a supervisor, you can use the real-time analytics reports to perform these tasks:

- Monitor key operational metrics in near-real time, and make course corrections at the appropriate time to help keep service levels high.
- Review the allocation of agents in near-real time, and then optimize to provide top-notch support and boost customer satisfaction.
- Improve agent staffing, effectiveness, and utilization by reviewing the skill set and capacity profile of the agent. You can then assign or transfer ongoing conversations by filtering through queue or agent.
- Monitor ongoing conversations, track customer sentiment, and intervene as required.
- Drill down to a specific channel, queue, or agent as required, to gain key operational insights in real time and take necessary action.

> **Note**
>
> The reports include conversations that were handled only by agents. They also include conversations that were escalated by the Power Virtual Agents bots. However, they don't include conversations that were resolved by Power Virtual Agents bots.

Security roles and permissions

Real-time analytics takes advantage of the security permissions that are defined in Dataverse. For example, if your organization has set business unit–level permissions for you, only metrics that are computed based on business unit–level data are shown to you.

As a supervisor, you can view the **Omnichannel real-time analytics** dashboard in Customer Service workspace. However, your administrator must enable the required permissions for you. Learn how to configure user roles to access analytics and dashboards.

> **Note**

If different values are shown to different users in the metrics, you must investigate the permissions for those users.

Access reports

You can view the different reports in the Customer Service workspace app. In the default view of Customer Service workspace, select **Omnichannel real-time analytics** in **Service**. By default, the **Summary** report is shown. To view the **Ongoing conversation**, **Agents**, and **Voice** reports, select the appropriate tabs.

If you can't view the reports, contact your system administrator. For more information, go to Manage real-time analytics reports in Omnichannel for Customer Service.

Dashboard details

The **Omnichannel real-time analytics** dashboard consists of the following reports:

- **Summary**: This report provides an overview of your organization in real time. It provides KPIs across the volume of customer interactions and service levels, together with the available capacity in real time. Learn more about the Summary report.
- **Voice**: This report provides an overview of conversations for the Omnichannel for Customer Service voice channel. Learn more about the Voice report.
- **Agents**: This report provides an overview of the health and KPIs of agents in your organization. The information that is shown on this report is based on the conversations. Learn more about the Agents report.
- **Ongoing conversation**: This report provides information about the conversations that agents are handling that are in active, open, wrap-up, or waiting status. Use it to monitor, assign, transfer, and forcibly close conversations for an agent, after reviewing their skill set and capacity profiles. Learn more about the Ongoing conversation report.

Filter information displayed on dashboard

Use the filters to drill down to KPIs across the dashboard. Adjust the filters based on the insights that you're looking for. The available filters include **Time**, **Agent**, **Channels**, **Queue**, **Time zone**, and **Conversation status**.

For example, the dropdown list for the **Time** filter includes the following options:

- **Include open conversations**: Show all conversations that started in the last 24 hours, and conversations that started in the last three days and are still open.
- **Last 24 hrs**: Show all conversations that started in the last 24 hours.
- **Today**: Shows all conversations that started on the current date in the selected time zone.

Pause updates on report data

Report data is automatically updated in real time for all the reports except the **Ongoing conversation** report. The report data on that report must be manually updated. You can use the **Pause updates** option to view and analyze real-time metrics at any point in time. To resume automatic updates of the report data, select **Resume updates**.

See also

Use Omnichannel for Customer Service metrics
Manage bookmarks
Customize the visual display of your analytics reports
Manage real-time analytics reports in Omnichannel for Customer Service
View and understand the Summary report in Omnichannel real-time analytics
View and understand the Voice report in Omnichannel real-time analytics
View and understand the Agents report in Omnichannel real-time analytics
View and understand the Ongoing conversation report in Omnichannel real-time analytics

View and understand the Summary report in Omnichannel real-time analytics

Article • 10/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

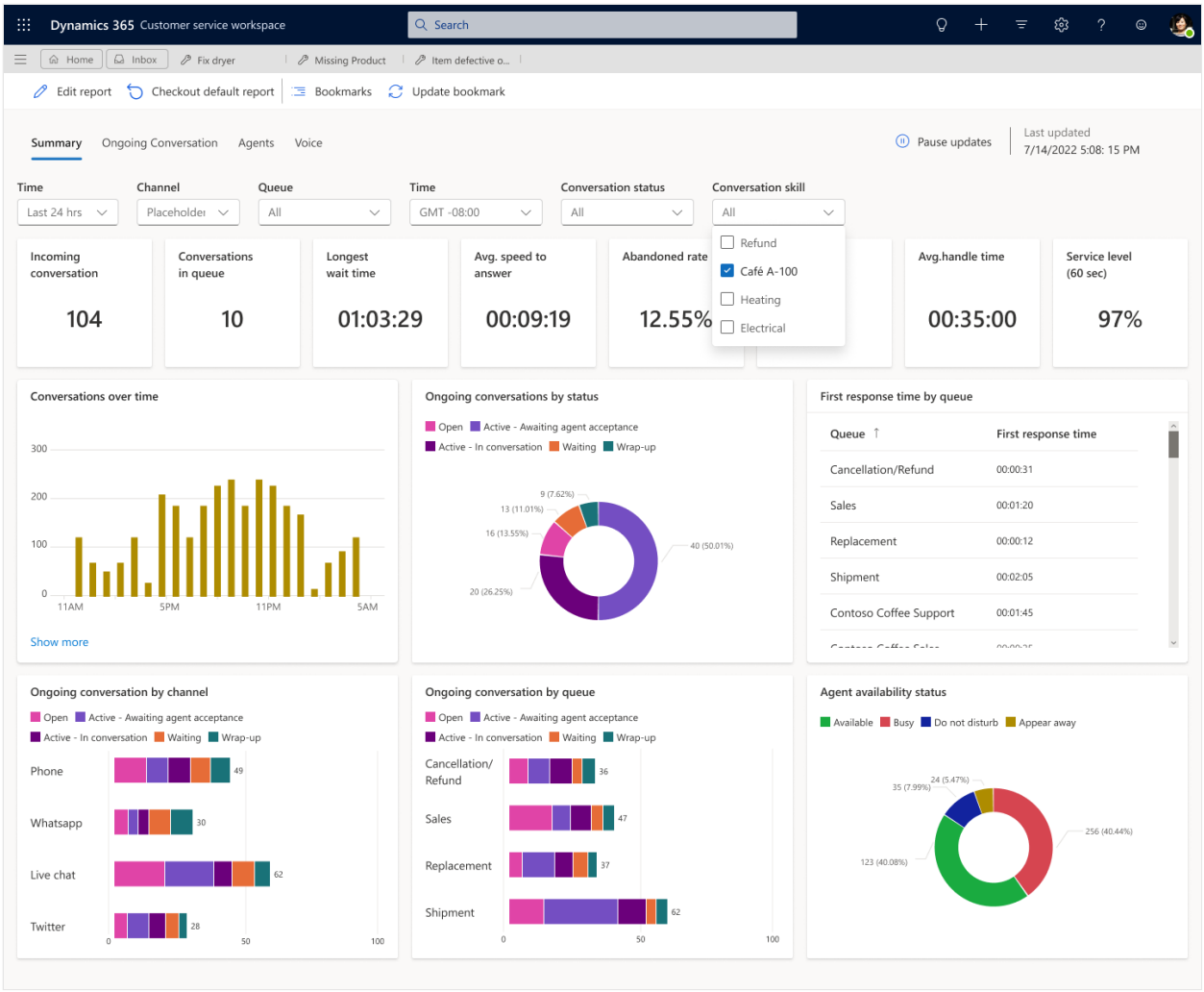
The **Summary** report appears by default when you open the **Omnichannel real-time analytics** dashboard in Customer Service workspace. You can filter this report by time, channels, queue, time zone, conversation status, and skills. For more information, go to Overview of the real-time Omnichannel analytics dashboard.

The **Summary** report provides a summary of customer conversations over time, by channel or queue. Statistics about the channel that a conversation came in through can help you analyze and manage queue distribution. For example, a high rate of abandoned conversations can lead to decreased customer satisfaction. To address the rate of abandoned conversations, you can examine operational metrics such as agent availability and queue distribution in real time.

Additionally, you can track customer sentiment to analyze whether customers are getting adequate support. For example, a high average handle time might indicate that agents are taking more than the required time to resolve customer issues. Depending on the issue, you can provide the required training or support to help agents resolve customer issues faster.

By editing the visual display, you can add metrics to the ones that are already shown on the **Summary** report. For more information, go to Customize visual display.

Learn more about the metrics that are shown on the Summary report.



Interactive charts

You can view different types of charts on the report, such as bar, horizontal bar, and donut charts. The visual display helps you discern changes and patterns in the data, so that you can act quickly to address the most important issues.

When you select a component in a chart, the data is filtered accordingly. In this way, you can view only data that is related to the selected component. For example, if you select the **Busy** component in the **Agent availability status** chart, the dashboard is refreshed and shows only the agents who are currently in the **Busy** state.

Drill-down reports

Drill down to sections of a report to find the data that interests you the most. This section provides details about the two drill-down reports that you can view on the **Summary** report.

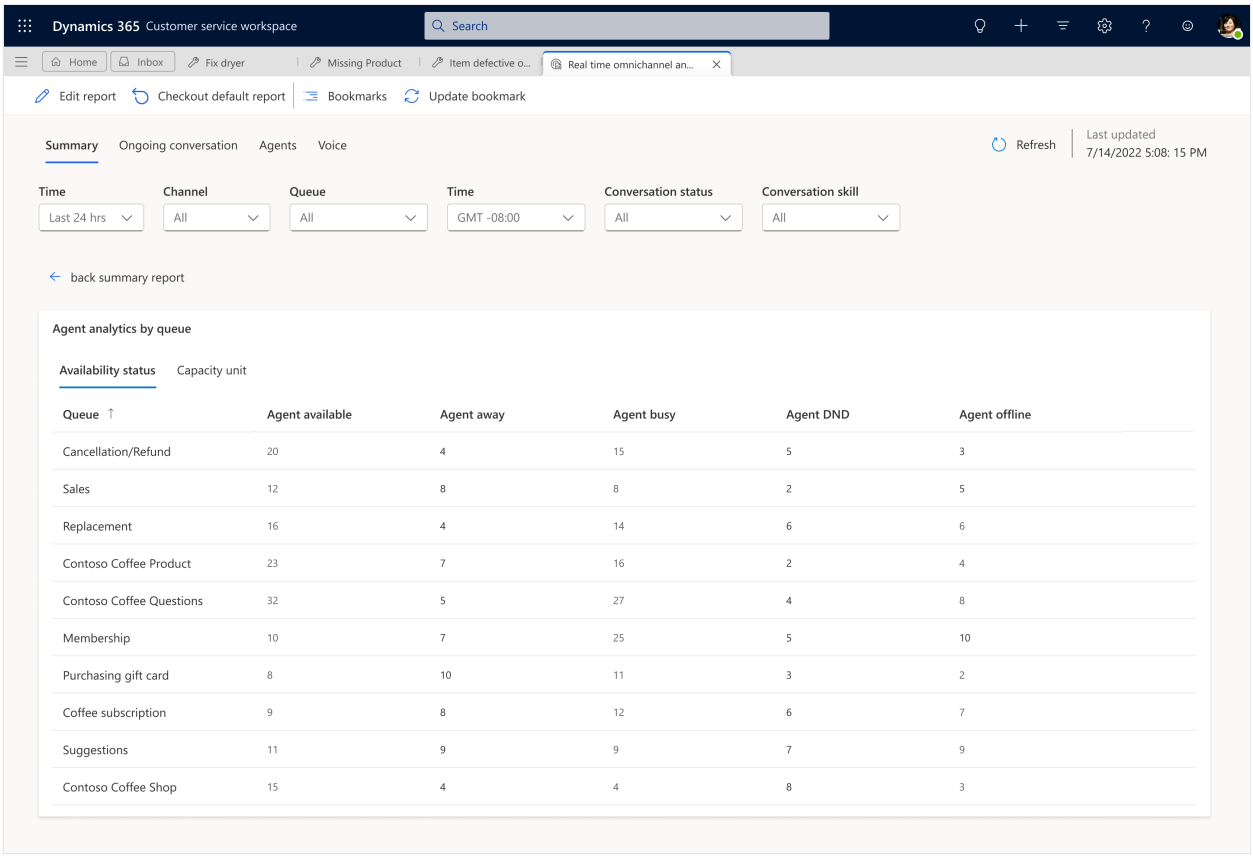
Conversations over time drill-down report

To view conversation analytics, select the **Show more** link on the **Conversations over time** KPI. You can drill through the conversations over time and analyze data by selecting the **Channel** or **Queue** tab.

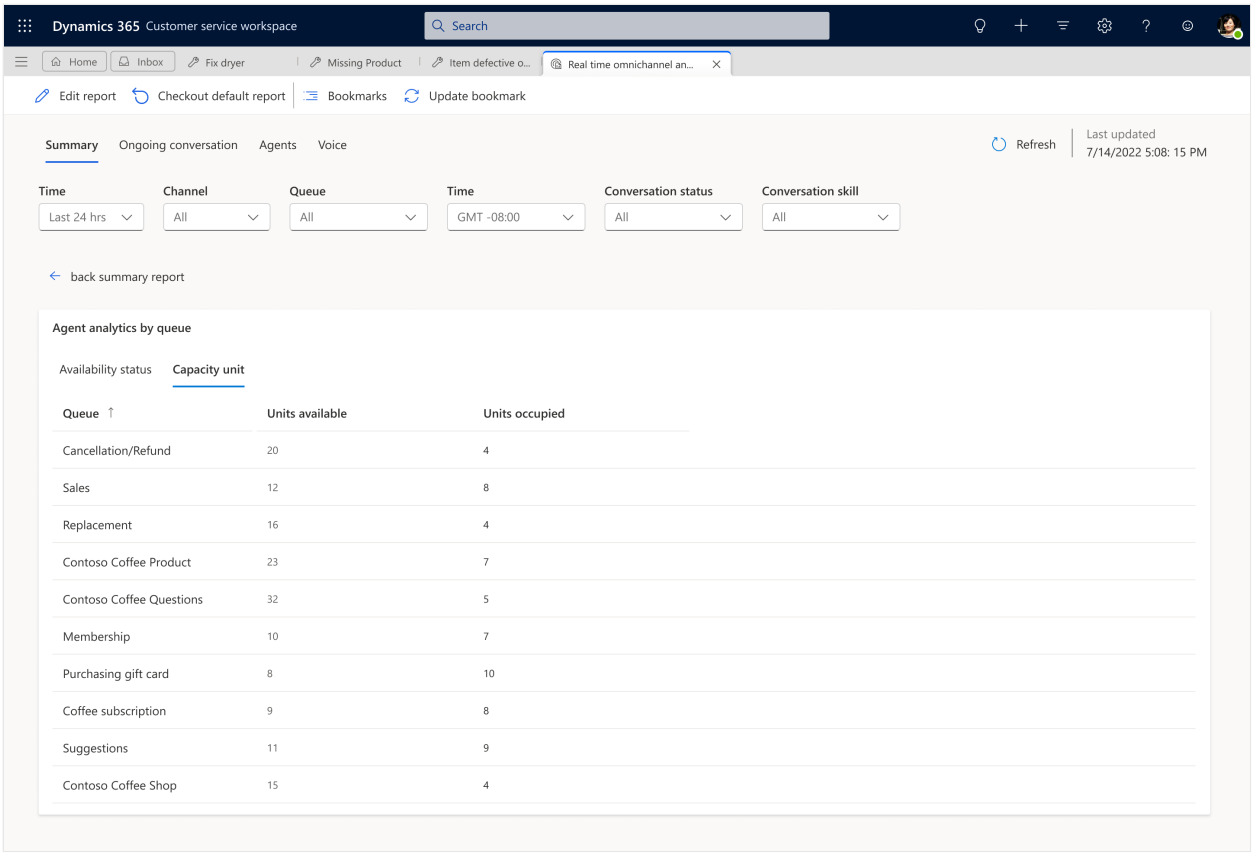
Agent availability status drill-down report

To view more details about agent analytics by queue, select the **Show more** link on the **Agent availability status** KPI. You can drill through agent analytics by:

Availability status



Capacity unit



These tabs will help you effectively manage agent activity in real time.

See also

Use Omnichannel for Customer Service metrics
Manage real-time analytics reports in Omnichannel for Customer Service
Overview of Omnichannel real-time analytics dashboard
View and understand the Voice report in Omnichannel real-time analytics
View and understand the Agents report in Omnichannel real-time analytics
View and understand the Ongoing conversation report in Omnichannel real-time analytics

View and understand the Voice report in Omnichannel real-time analytics

Article • 10/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

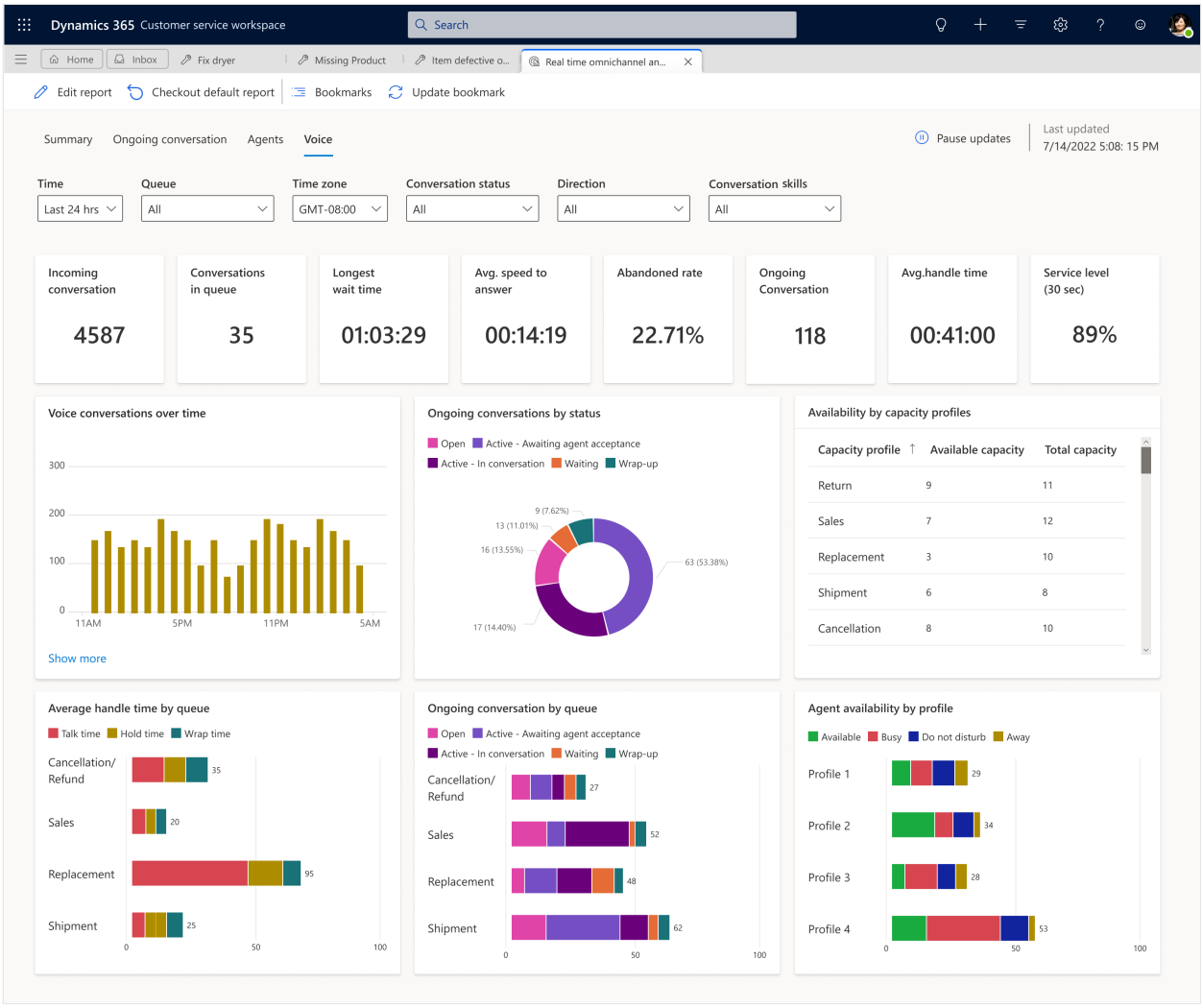
The **Voice** report gives you insights into key metrics across the voice channel. You can filter this report by time, queue, time zone, conversation status, direction, and skills. For more information, go to Overview of the real-time Omnichannel analytics dashboard.

This report is available only if the voice feature is configured for your organization. For more information, go to Manage real-time analytics reports in Omnichannel for Customer Service.

The **Voice** report provides a summary of voice conversations over time, by queue. Voice-specific metrics for the last 24 hours, such as conversations in the queue, average wait time, and average handle time, help you optimize the call flow. You can use these metrics to reduce the conversation hold time. You can assign the right agents based on skills and increase agent efficiency and customer satisfaction.

You can also monitor voice-specific operational metrics such as conversation direction. This metric indicates whether the conversation was started by the customer or a contact center agent. You can use these operational metrics to manage queue distribution.

Learn more about the metrics that are shown in the charts on the Voice report.



Interactive charts

You can view different types of charts on the report, such as bar, horizontal bar, and donut charts. The visual display helps you discern changes and patterns in the data, so that you can act quickly to address the most important issues.

When you select a component in a chart, the data is filtered accordingly. In this way, you can view only data that is related to the selected component. For example, if you select the **Busy** component in the **Agent availability status** chart, the dashboard is refreshed and shows only the agents who are currently in the **Busy** state.

Drill-down report

Drill down to sections of a report to find the data that interests you the most. To view voice conversation analytics, select the **Show more** link on the **Voice conversations over time** KPI. You can drill through voice conversations analytics and analyze data by queue.

See also

Use Omnichannel for Customer Service metrics
Manage real-time analytics reports in Omnichannel for Customer Service
Overview of Omnichannel real-time analytics dashboard
View and understand the Summary report in Omnichannel real-time analytics
View and understand the Agents report in Omnichannel real-time analytics
View and understand the Ongoing conversation report in Omnichannel real-time analytics

View and understand the Agents report in Omnichannel real-time analytics

Article • 10/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

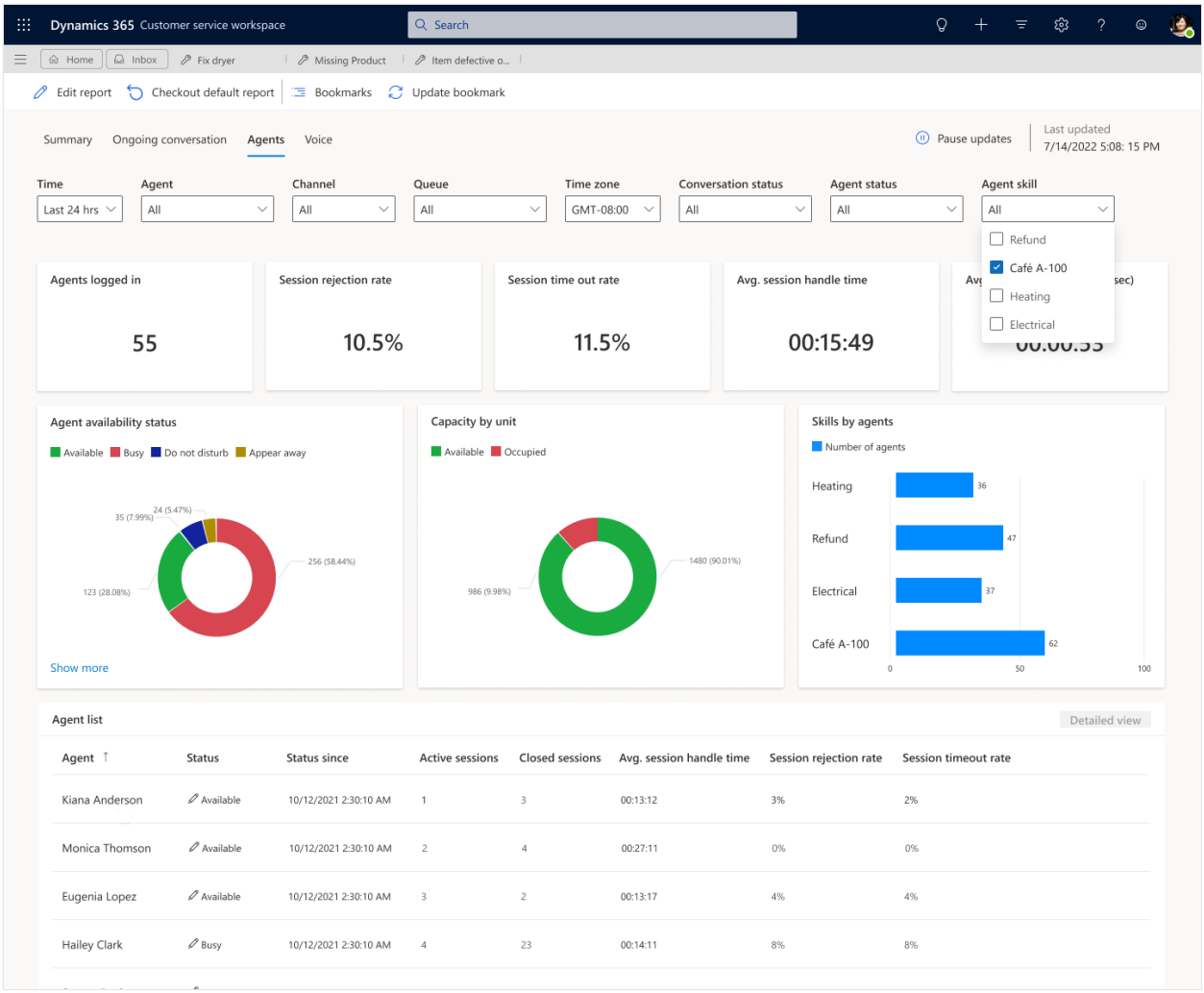
The **Agents** report consists of metrics that provide an overview of agent performance to help contact center managers optimize agent allocation in real time. This capability is crucial for ensuring that customers receive the best possible support.

The **Agents** report provides information about agent capacity and status for the last 24 hours. By drilling down to view details such as capacity at each agent level, you can quickly identify and allocate resources to address any staffing shortages. In this way, you help ensure that customers receive support when they need it.

You can also sort agents by skills by using the **Skills** filter. In the Agent list section, when you hover over an agent name, the skill set and proficiency of the agent appears. You can review the skills and then assign the best agent required to solve the issue at hand.

You can select the **All** filter to view agent performance across all channels. Alternatively, you can select a channel to view channel-specific agent performance. You can also filter areas by time, queue, time zone, and conversation status. For more information, go to Overview of Omnichannel Real-time analytics dashboards.

Learn more about the metrics that are shown on the Agents report.



Interactive charts

You can view different types of charts on the report, such as donut charts. The visual display helps you discern changes and patterns in the data, so that you can act quickly to address the most important issues.

When you select a component in a chart, the data is filtered accordingly. In this way, you can view only data that is related to the selected component. For example, if you select the **Busy** component in the **Agent availability status** chart, the dashboard is refreshed and shows only the agents who are currently in the **Busy** state.

Agent details drill-down

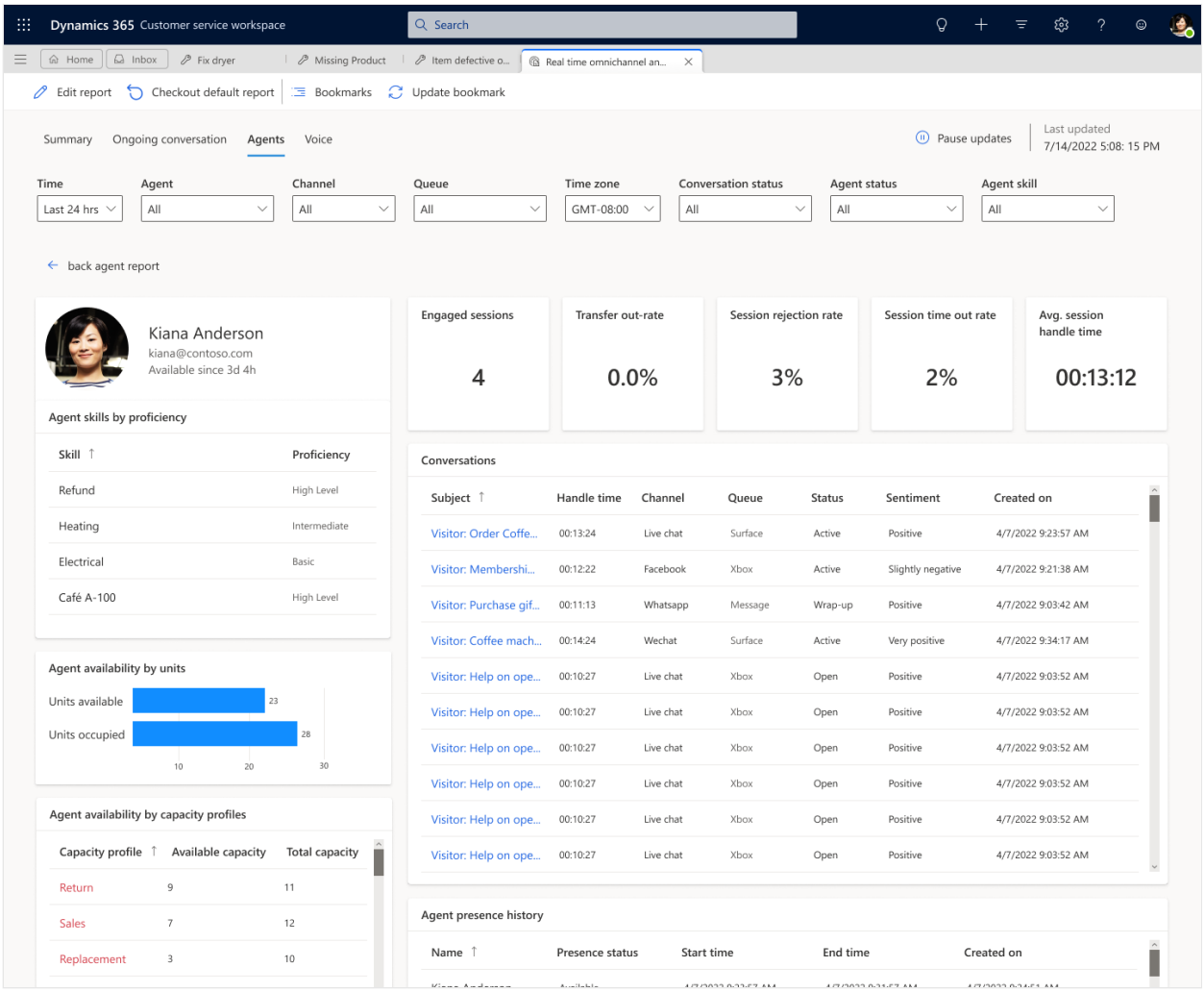
> **Note**
>
> If you don't see all the listed agents from the report as logged in, work with your administrator to make sure your agents have the **Omnichannel agent** role, or that custom roles have the **Read** privilege on the msdyn_agentstatus entity reference.

You can drill down from the **Agent list** section on the dashboard to key metrics about agent details and view specific insights about individual agents' performance. Select an agent name in the **Agent list** grid, and then select **Detailed view**. Agent details are shown on a new page.

On the agent details page, you can view agent skills by proficiency, and agent availability by units and capacity profiles.

You can drill down further through **Conversations** and track how a conversation progressed and the customer sentiment that is associated with it. Through **Agent presence history**, you can view agent presence in real time.

Learn more about the metrics in the Agent list grid and on the agent details page.



See also

Use Omnichannel for Customer Service metrics
Manage real-time analytics reports in Omnichannel for Customer Service
Overview of Omnichannel real-time analytics dashboard
View and understand the Voice report in Omnichannel real-time analytics
View and understand the Ongoing conversation report in Omnichannel real-time

analytics

View and understand the Summary report in Omnichannel real-time analytics

View and understand the Ongoing conversation report in Omnichannel real-time analytics

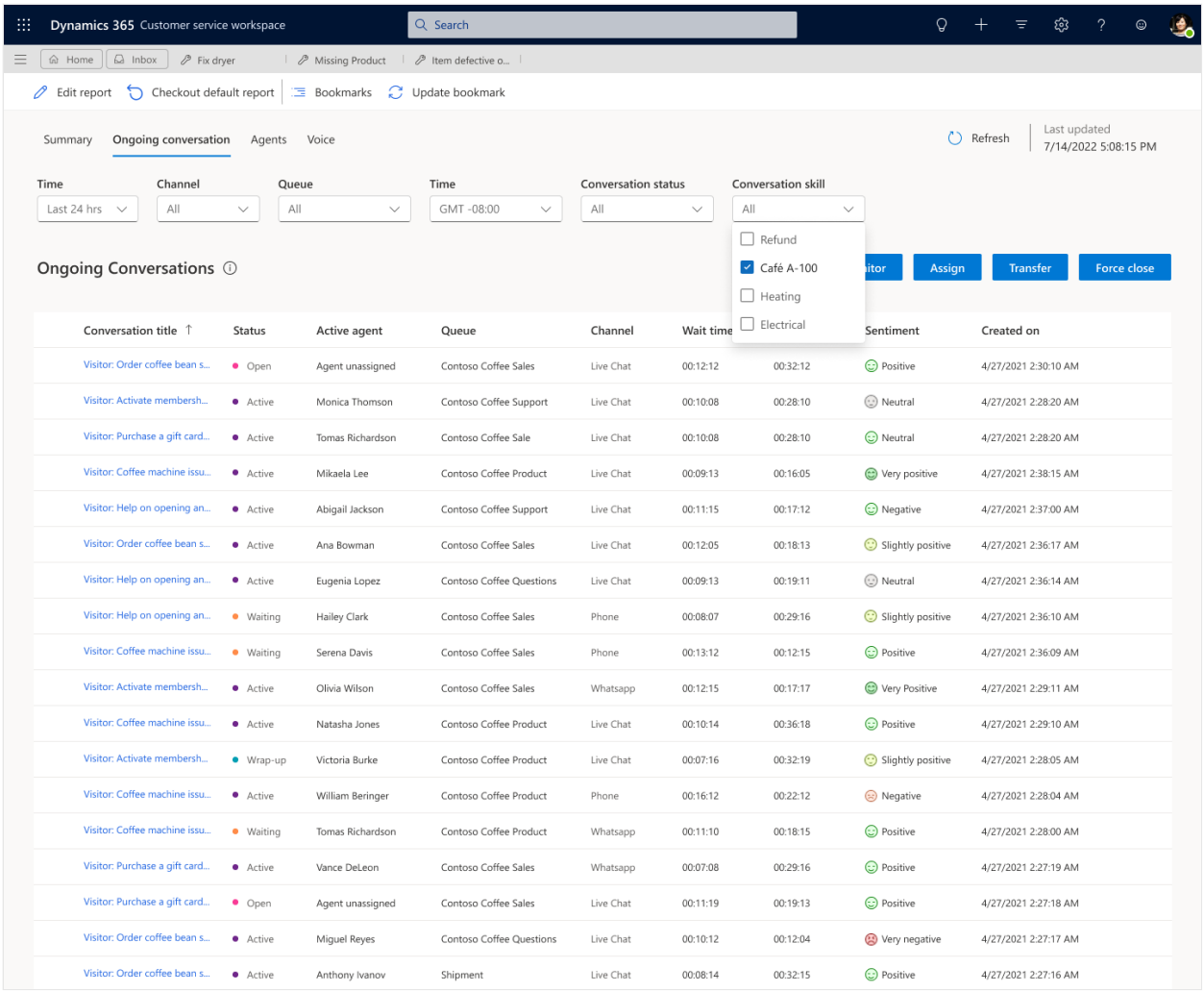
Article • 10/19/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The **Ongoing conversation** report provides information about the status of conversations that are currently being handled by agents in your organization, and that aren't yet closed. The conversation status can be open, active, wrap-up, or waiting.

This report provides a holistic view of the conversations in real time. It includes details such as the subject, status, active agent details, queue, channel, wait time, handle time, and customer sentiment. For more information, go to Overview of Omnichannel real-time analytics dashboards.

Learn more about the metrics that are shown on the Ongoing conversation report.



The conversation list shows current ongoing conversations from the last 24 hours. Therefore, managers have a real-time view of the interactions between agents and customers. You can also select an agent and then use the following buttons to perform different actions on conversations:

- **Assign**: Assign an incoming or unassigned conversation filtered by either a queue or an agent, after reviewing the skill set and capacity profile of agents.
- **Transfer**: Transfer an ongoing conversation from one agent to another after reviewing the skill set and capacity profile of an agent.
- **Monitor**: Listen to an ongoing conversation. When you select **Monitor**, you receive a message that states that monitoring has begun. This action is applicable only to active conversations with agent acceptance, conversations that are in a wrap-up state, and conversations that are in a waiting state.
- **Force close**: Forcibly close a conversation by closing the work item. When you select **Force close**, a confirmation message box appears. You must select **Proceed** to close the work item. When you forcibly close a conversation, the conversation immediately ends for the customer too. We recommend that you use this action with caution.

See also

Use Omnichannel for Customer Service metrics
Manage real-time analytics reports in Omnichannel for Customer Service
Overview of Omnichannel real-time analytics dashboard
View and understand the Voice report in Omnichannel real-time analytics
View and understand the Agents report in Omnichannel real-time analytics
View and understand the Summary report in Omnichannel real-time analytics

Customer Service dashboards

Article • 03/31/2023

The insights dashboards for Customer Service contain various charts and metrics to help you understand the factors that can improve customer service for your organization. Key performance indicators and visual breakdowns of your organization's support cases are coupled with AI-generated insights on cases and topics that contribute to overall trends.

The Customer Service dashboards give you a performance summary and detailed reports on cases, agents, and topics. You can make changes to the visual display of the dashboards and also save your personalized views as bookmarks.

Manage dashboards

To manage the dashboards, go to: Manage historical analytics reports in Customer Service.

Customer Service historical analytics reports

The following dashboard reports are available for Customer Service historical analytics:

Summary

The Summary dashboard gives you a broad overview of the customer service experience in your organization. It uses AI technology to show you topics that are generating the highest volume and emerging topics with the highest rate of change in volume. More information: Summary dashboard

Agent

The Agent dashboard shows charts and KPIs for individual agents and overall agent performance. More information: Agent dashboard

Case Topics

The Case Topics dashboard shows a detailed breakdown of cases and their assigned topics. More information: Topics dashboard

Information that you need to know about the analytics reports

About this report

About this report is a link that you can select to view the corresponding documentation.

Reports refresh, data retention

The reports refresh shows the following information.

- **Data refresh:** Occurs every 24 hours. The reports are available during the refresh process. The **Last updated** timestamp in the report pages indicates when the latest data was included in the report, and the time reflects the time zone that's set in your user preferences.
- **Custom refresh:** Isn't available.
- **Data refresh for inactive environments:** Data refresh is paused if the reports aren't used continuously for two weeks. When you access a report after a lengthy period of inactivity, the report will be refreshed in the next refresh cycle.
- **Data retention:** Data is stored for 24 months.

Supported tables

The following tables are used for Customer Service historical analytics:

- incident
- incidentresolution
- appmodule
- organization
- msfp_surveyresponse
- msfp_question
- msfp_questionresponse
- msdyn_casetopic
- msdyn_casetopic_incident
- msdyn_casetopicsetting
- Queue
- QueueItem
- Subject
- SystemUser

> **Note**
>
> A report might be blank if you've customized any of the listed entities or are using out-of-the-box entities.

See also

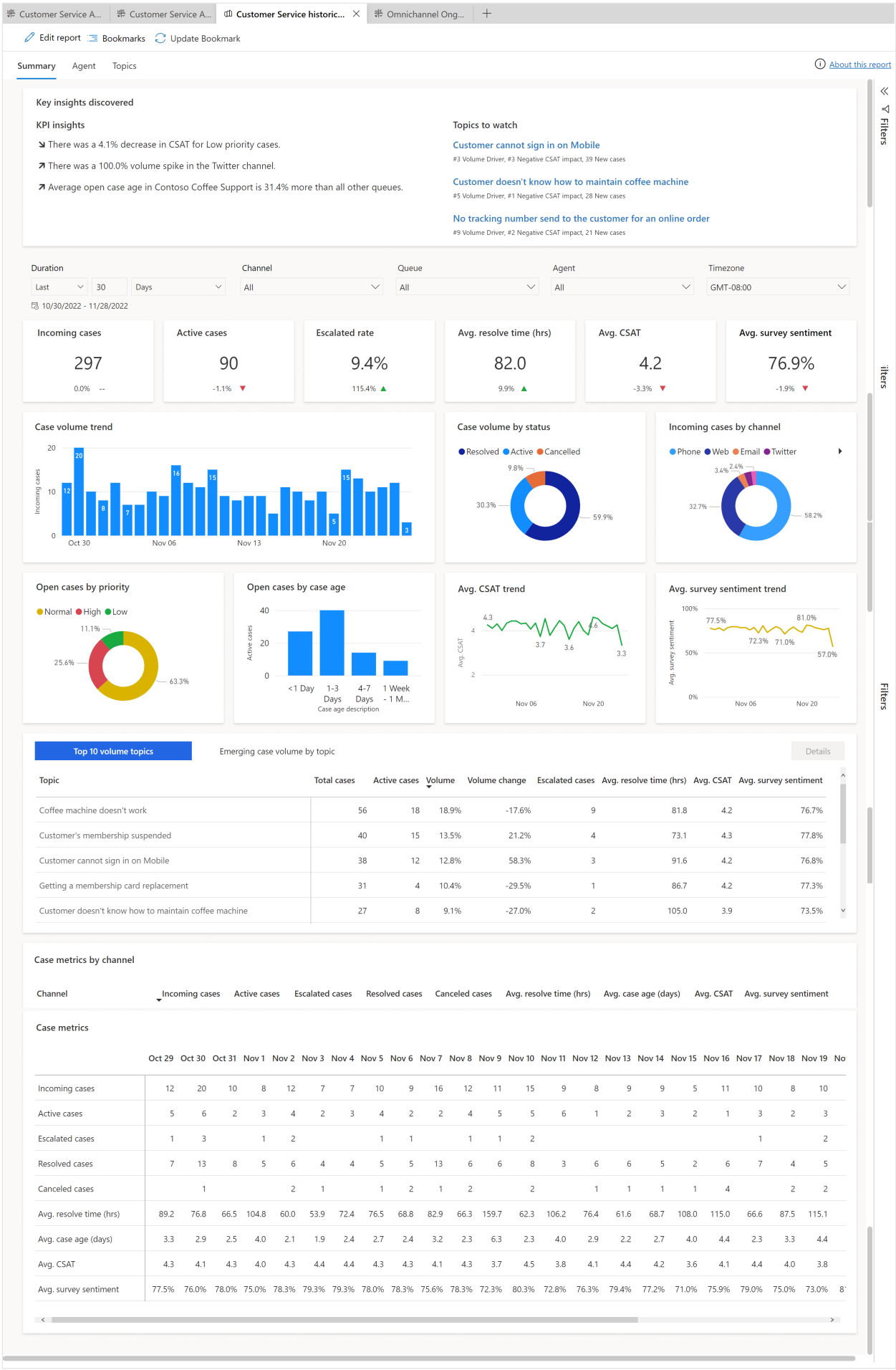
Introduction to Customer Service insights
Configure Customer Service insights for Customer Service Hub and Customer Service workspace
Manage bookmarks
Customize visual display
Customize data models of historical analytics reports in Customer Service
Tracked keywords in Dynamics 365 Sales

Summary dashboard

Article • 12/10/2022

The Summary dashboard gives you a broad overview of the customer service experience in your organization. It uses AI to provide insights into topics that are generating the highest volume and which topics that are emerging with the highest rate of change in volume.

The summary dashboard includes a variety of charts with graphical views of key performance indicators in Customer Service.



The case volume drivers and emerging case volume by topic charts use natural language understanding to group support cases as topics that are a collection of related cases.

These charts show you the customer support topics that are generating the most volume and emerging topics with the highest rate of change in volume, helping you identify areas for improvement that can have the greatest impact on system performance.

By default, the dashboard shows you KPIs for the past month and for all channels, queues, and agents in your system. The data filtering options allow you to select data for specific time periods, channels, queues, and agents. To filter data by duration, channel, queue, or agent, select a value from the respective dropdown list.

> ⓘ **Note**
>
> If you switch to a different dashboard, the filter you specify persists and is applied to the data on all dashboards.

Access the Summary dashboard

In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

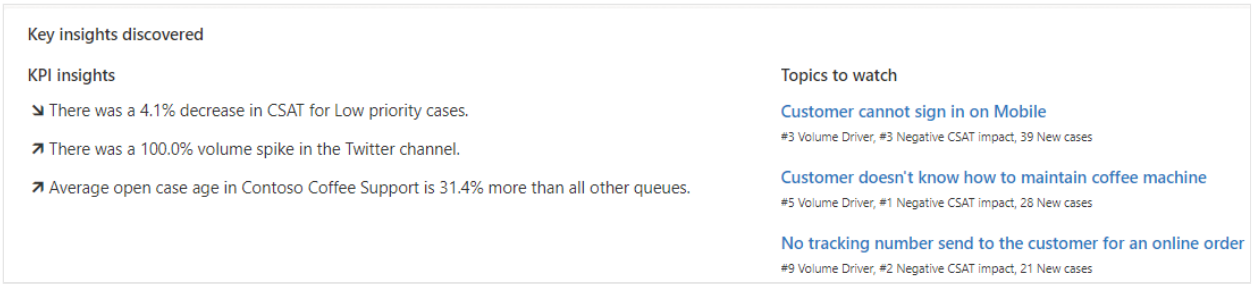
- In the default view, select the plus (+) icon, and then select **Customer Service historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Customer Service historical analytics**.

On the page that appears, select the dashboard.

Key Insights discovered

The Key Insights discovered section has two areas:

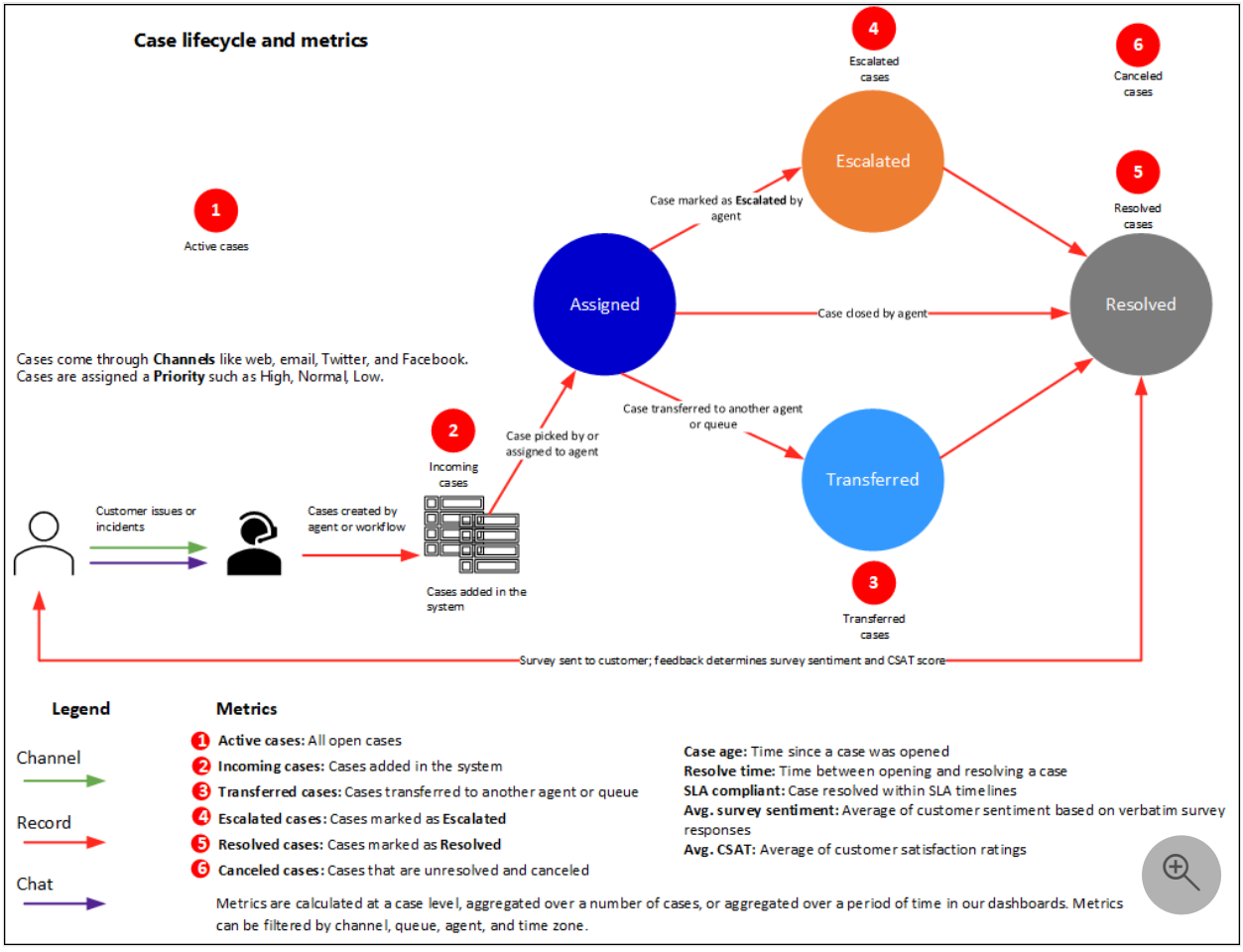
- **KPI insights**: Important subjects that impact performance, such as CSAT pertaining to priority, volume pertaining to channel, and open cases pertaining to queues.
- **Topics to watch**: Topics that rank high across the three key areas to make it easier for customer service managers to discover top issues.



Report details

The KPI summary charts summarize the key performance indicators for the specified time period and the percent change over the period. You can filter these areas by duration, channel, queue, and agent.

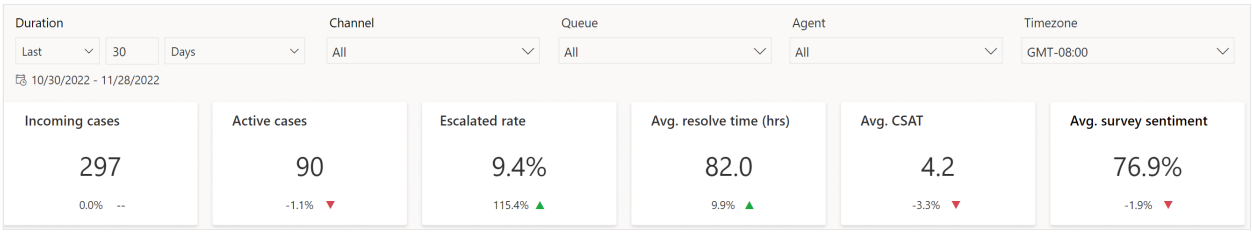
The case lifecycle and the metrics that can be derived in the different statuses is represented in the following diagram.



The following table shows the key performance indicators that are displayed in the report.

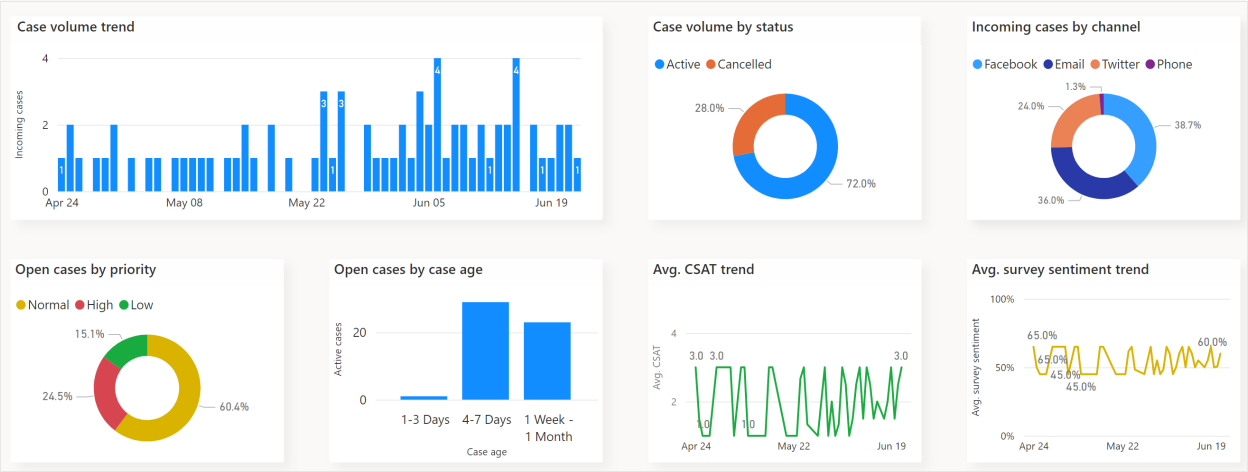
KPI	Description
Incoming cases	The number of cases created to support customers.

KPI	Description
Active cases	The number of cases that are currently open.
Escalated rate	The percentage of cases that have been escalated.
Avg. resolve time (hrs)	The average length of time taken by an agent to resolve the case.
Avg. CSAT	The average customer satisfaction score, based on Customer Voice survey submitted by the customer.
Avg. survey sentiment	The average sentiment score, based on Customer Voice survey written feedback submitted by the customer.



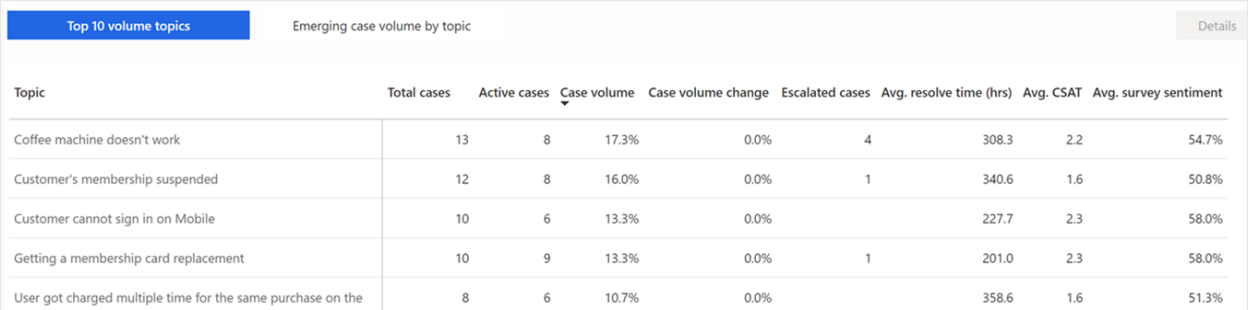
The following metrics are displayed in the charts.

Chart	Description
Case volume by status	A breakdown of case volume by status.
Open cases by priority	A case breakdown by priority level.
Incoming cases by channel	A case breakdown by channel.
Open cases by case age	A breakdown of cases by the amount of time in an open state.
Avg. CSAT trend	The year-over-year trend of case volume.
Avg. survey sentiment trend	The year-over-year trend of CSAT from Customer Voice survey responses.



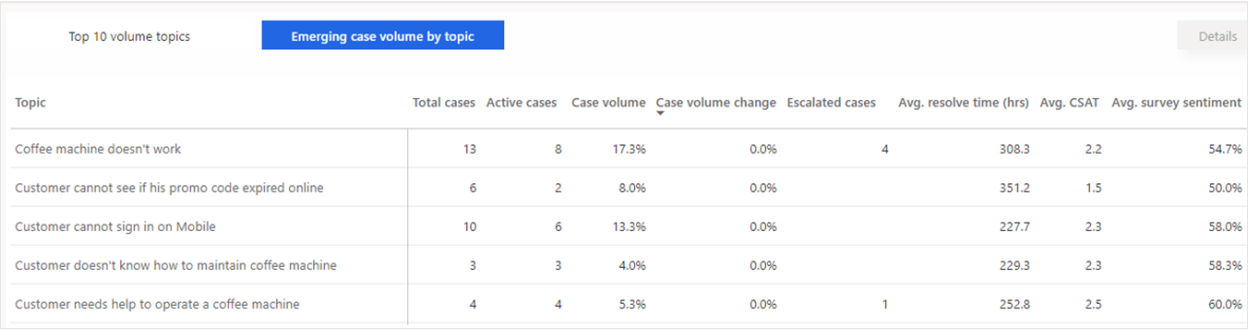
A blue up-and-down indicator next to the value indicates the percent change in a positive direction. A red indicator indicates the percent change in a negative direction.

On the **Top 10 volume topics** tab, you can view the top 10 AI-discovered topics by case volume.



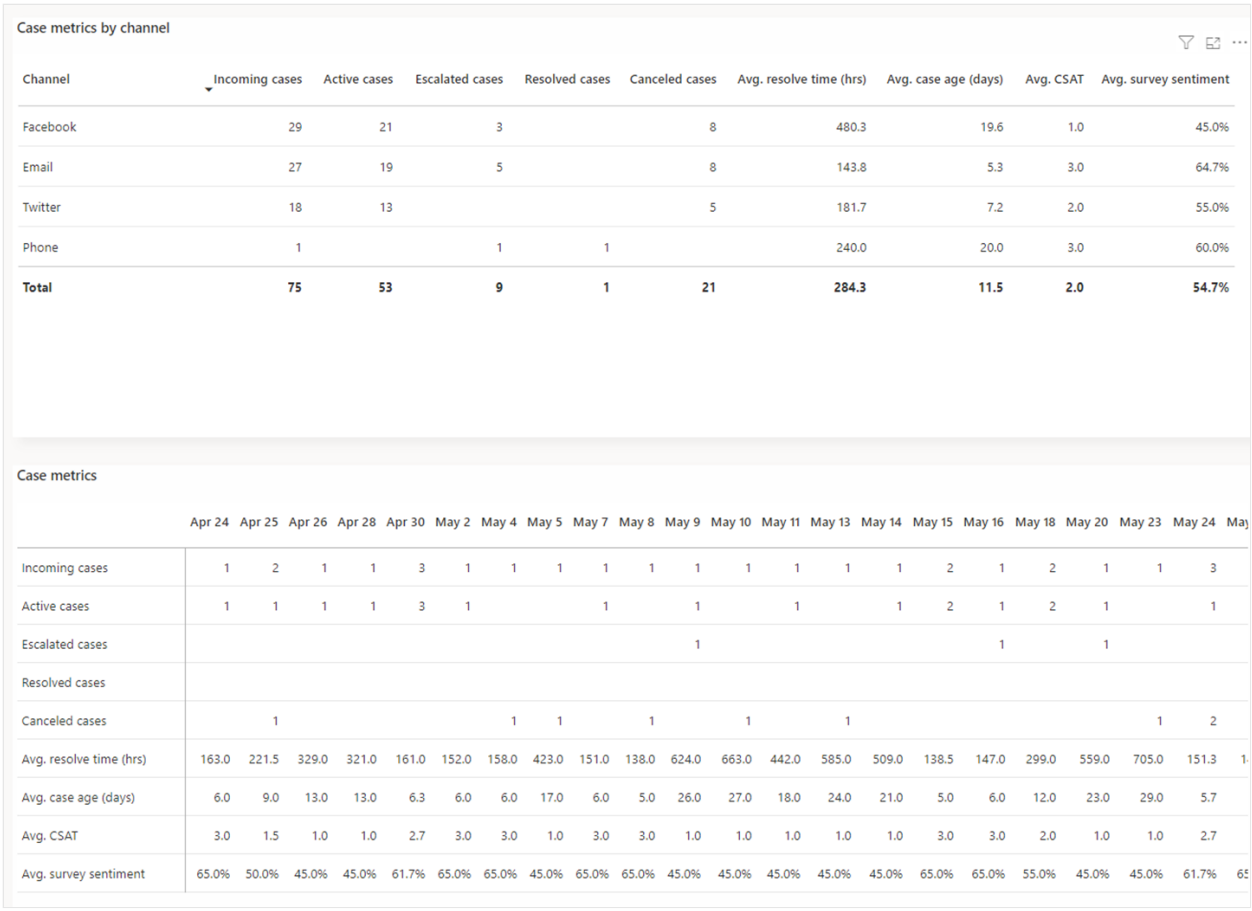
Topic	Total cases	Active cases	Case volume	Case volume change	Escalated cases	Avg. resolve time (hrs)	Avg. CSAT	Avg. survey sentiment
Coffee machine doesn't work	13	8	17.3%	0.0%	4	308.3	2.2	54.7%
Customer's membership suspended	12	8	16.0%	0.0%	1	340.6	1.6	50.8%
Customer cannot sign in on Mobile	10	6	13.3%	0.0%		227.7	2.3	58.0%
Getting a membership card replacement	10	9	13.3%	0.0%	1	201.0	2.3	58.0%
User got charged multiple time for the same purchase on the	8	6	10.7%	0.0%		358.6	1.6	51.3%

On the **Emerging case volume by topic** tab, you can view the the top emerging AI discovered topics based on increase in case volume.



Topic	Total cases	Active cases	Case volume	Case volume change	Escalated cases	Avg. resolve time (hrs)	Avg. CSAT	Avg. survey sentiment
Coffee machine doesn't work	13	8	17.3%	0.0%	4	308.3	2.2	54.7%
Customer cannot see if his promo code expired online	6	2	8.0%	0.0%		351.2	1.5	50.0%
Customer cannot sign in on Mobile	10	6	13.3%	0.0%		227.7	2.3	58.0%
Customer doesn't know how to maintain coffee machine	3	3	4.0%	0.0%		229.3	2.3	58.3%
Customer needs help to operate a coffee machine	4	4	5.3%	0.0%	1	252.8	2.5	60.0%

You can view the core case metrics by channel or core case metrics in relation to other metrics and date.



Case metrics by channel

Channel	Incoming cases	Active cases	Escalated cases	Resolved cases	Canceled cases	Avg. resolve time (hrs)	Avg. case age (days)	Avg. CSAT	Avg. survey sentiment
Facebook	29	21	3		8	480.3	19.6	1.0	45.0%
Email	27	19	5		8	143.8	5.3	3.0	64.7%
Twitter	18	13			5	181.7	7.2	2.0	55.0%
Phone	1		1	1		240.0	20.0	3.0	60.0%
Total	**75**	**53**	**9**	**1**	**21**	**284.3**	**11.5**	**2.0**	**54.7%**

Case metrics

	Apr 24	Apr 25	Apr 26	Apr 28	Apr 30	May 2	May 4	May 5	May 7	May 8	May 9	May 10	May 11	May 13	May 14	May 15	May 16	May 18	May 20	May 23	May 24	May
Incoming cases	1	2	1	1	3	1	1	1	1	1	1	1	1	1	1	2	1	2	1	1	3	
Active cases	1	1	1	1	3	1			1		1		1		1	2	1	2	1		1	
Escalated cases											1						1		1			
Resolved cases																						
Canceled cases		1					1	1		1		1		1						1	2	
Avg. resolve time (hrs)	163.0	221.5	329.0	321.0	161.0	152.0	158.0	423.0	151.0	138.0	624.0	663.0	442.0	585.0	509.0	138.5	147.0	299.0	559.0	705.0	151.3	1
Avg. case age (days)	6.0	9.0	13.0	13.0	6.3	6.0	6.0	17.0	6.0	5.0	26.0	27.0	18.0	24.0	21.0	5.0	6.0	12.0	23.0	29.0	5.7	
Avg. CSAT	3.0	1.5	1.0	1.0	2.7	3.0	3.0	1.0	3.0	3.0	1.0	1.0	1.0	1.0	1.0	3.0	3.0	2.0	1.0	1.0	2.7	
Avg. survey sentiment	65.0%	50.0%	45.0%	45.0%	61.7%	65.0%	65.0%	45.0%	65.0%	65.0%	45.0%	45.0%	45.0%	45.0%	45.0%	65.0%	65.0%	55.0%	45.0%	45.0%	61.7%	65

See also

Dashboard overview

Agent dashboard

Topics dashboard

Manage report bookmarks

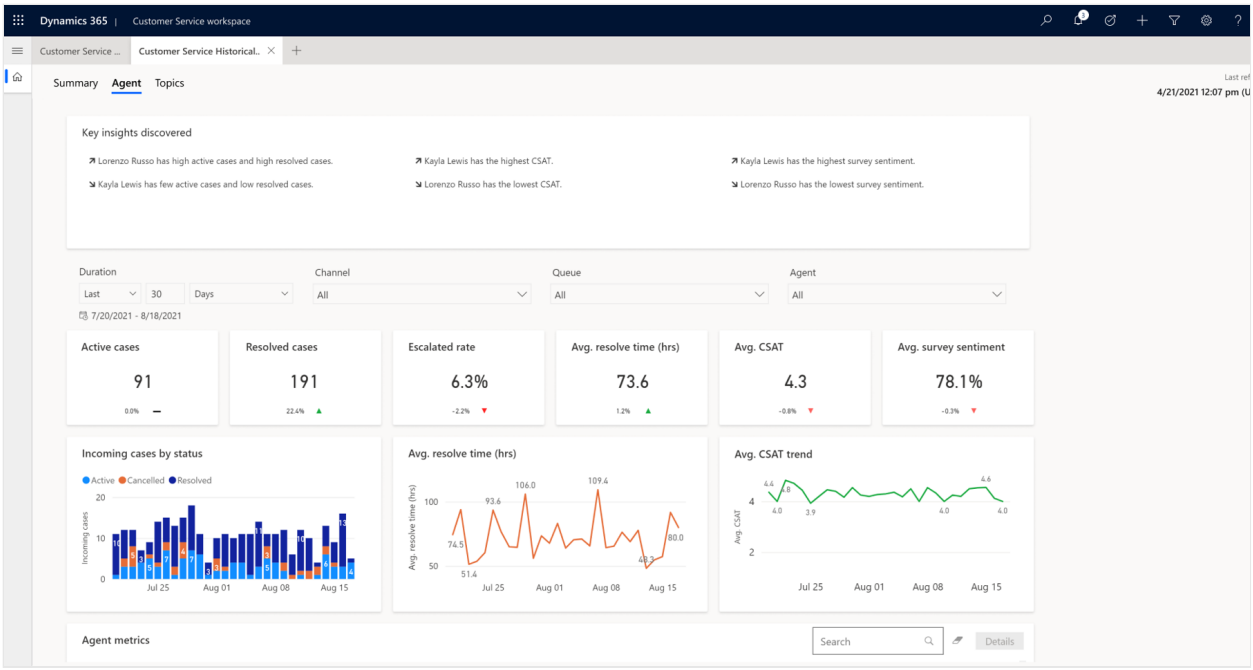
Agent dashboard in historical analytics

Article • 10/12/2022

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

The Agent dashboard shows charts and KPIs that you can use to guide agents and understand overall agent performance.

To view the Agent dashboard, go to Customer Service historical analytics and select **Agent** at the top of the workspace. The dashboard shows charts and KPIs for individual agents and overall agent performance, and includes the following insights:



Access the Agent dashboard

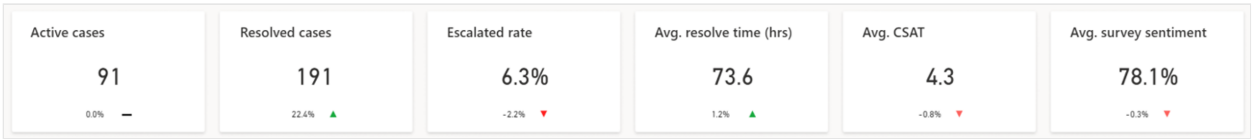
In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Customer Service historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Customer Service historical analytics**.

On the page that appears, select the dashboard.

Report details

The reports summarize the key performance indicators for the specified time period and the percent change over the period. You can filter these areas by duration, channel, queue, agent conversation and timezone. The KPIs for the dashboard are displayed as seen in the following screenshot.



The following table displays the key performance indicators in the agent report.

KPI	Description
Active cases	The number of cases that are currently open.

KPI	Description
Resolved cases	The number of cases that have been closed by an agent.
Escalated cases	The percentage of cases that have been escalated.
Average resolve time	The average time taken by an agent to resolve the case.
Average CSAT	The average customer satisfaction score, based on written feedback submitted by the customer in the Customer Voice survey.
Average survey sentiment	The average sentiment score, based on written feedback submitted by the customer in the Customer Voice survey.

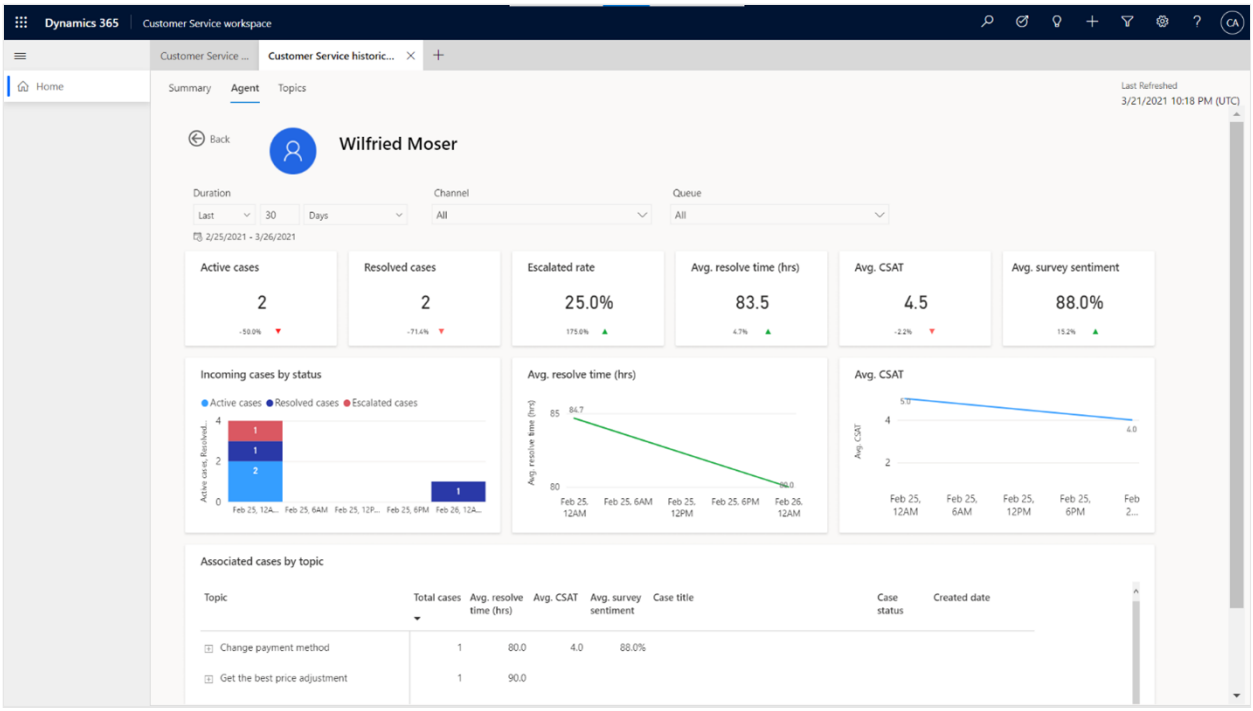
The agent dashboard has charts that have the following metrics.

KPI	Description
Case volume over duration	Day-over-day trend of case volume.
Average resolve time	Month-over-month trend of case resolution time in minutes.
CSAT and survey sentiment by agent	Agent-focused view comparing CSAT and sentiment from Customer Voice survey responses.
Agent metrics	Overview of core agent metrics in relation to other metrics and date.

Agent drill down view

The Agent drill down view provides supervisors with a holistic look into individual agent performance on metrics and can be valuable in training scenarios for agents.

To access the drill down report, select any metric value for the required agent, and then select **Details**.



See also

Dashboard overview

Summary dashboard

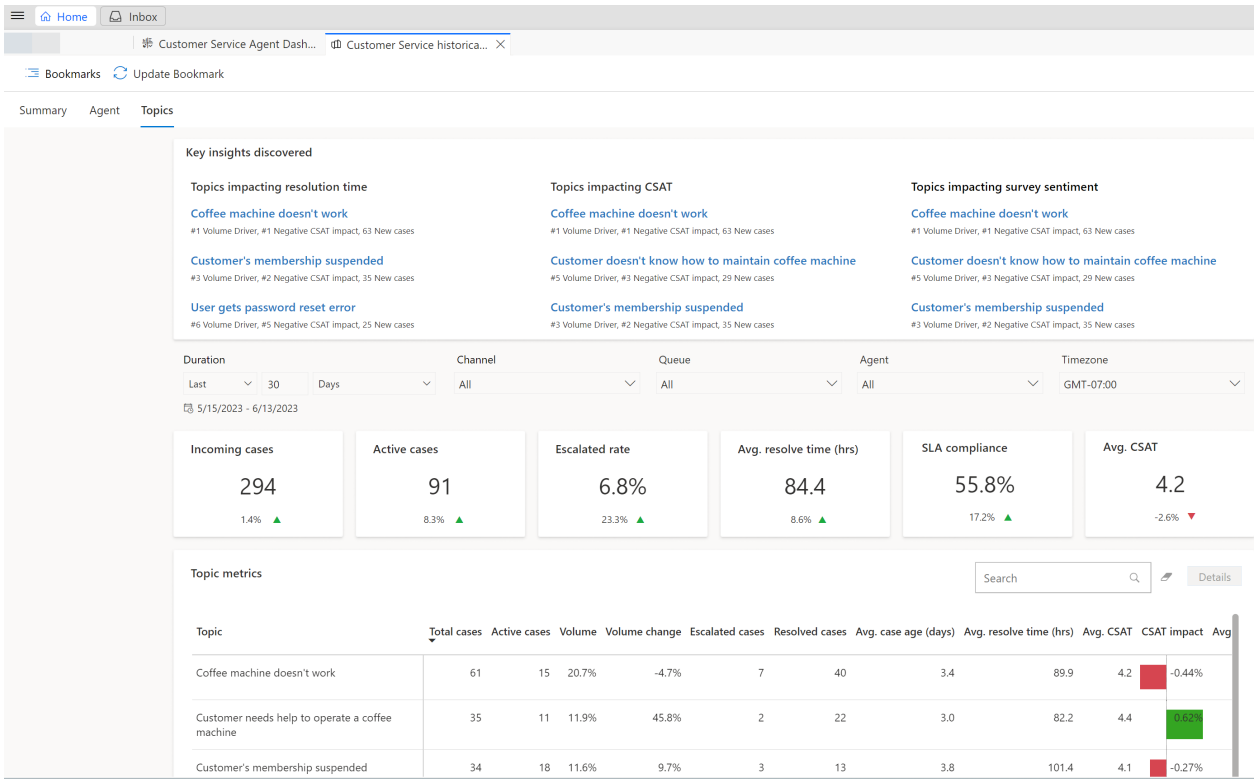
Topics dashboard

Manage report bookmarks

Topics dashboard

Article • 06/21/2023

The Topics dashboard shows a detailed breakdown of cases and their assigned topics. Customer Service Insights uses AI-generated topics and natural language understanding to automatically group your cases to help you better understand how different case types and topic areas are impacting your organization's support performance.



To view the Topics dashboard, go to customer service historical analytics and select **Topics** at the top of the workspace.

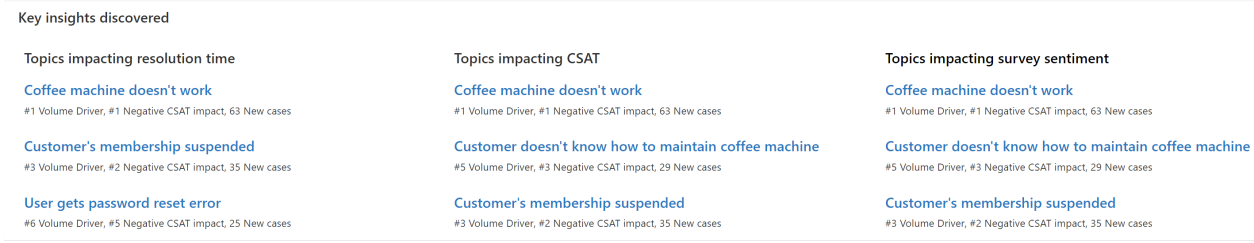
Access the Topics dashboard

In the Customer Service workspace app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select Customer Service historical analytics.
- If the enhanced multisession workspace view is enabled, select the site map and then select Customer Service historical analytics.

On the page that appears, select the dashboard.

Key insights card



The Key insights discovered card has three areas:

- Topics to watch
- Topics impacting CSAT
- Topics impacting resolution time

Report details

The key performance indicator (KPI) summary charts summarize the KPIs for the specified time period and the percentage of change over the period. You can filter these areas by duration, channel, queue, and agent.

The topics dashboard report has the following KPIs.

KPI	Description
Total cases	The number of cases created to support customers.
Active cases	The number of cases that are currently opened.
Escalated rate	The percentage of cases that have been escalated.
Avg. resolve time (hrs)	The average time an agent took to resolve the case.
Average CSAT	The average customer satisfaction score, based on written feedback submitted by the customer in the Customer Voice survey.
Average sentiment	The average sentiment score, based on written feedback submitted by the customer in the Customer Voice survey.

The topic metrics chart has the following metrics displayed:

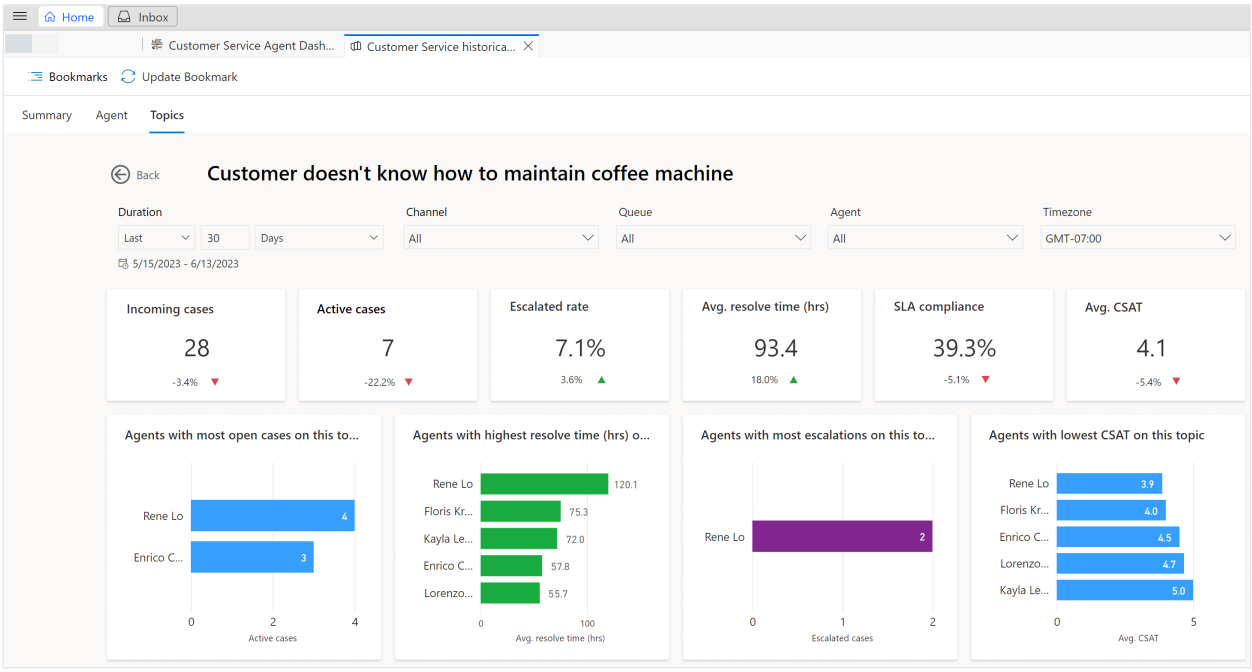
Chart	Description
Total cases	The number of cases created to support customers.
Occurrence by topic	Percentage of cases classified to each given topic.

Chart	Description
Average resolution time	Month over month trend of case resolution time in minutes.
Average CSAT	The average customer satisfaction score, based on Customer Voice survey submitted by the customer.
CSAT impact	The amount that the given topic is driving the overall CSAT trend for the organization.
Avg. survey sentiment	The average sentiment score, based on Customer Voice survey written feedback submitted by the customer.
Survey sentiment impact	The amount that the given topic is driving the overall sentiment trend for the organization.

Case topics drill-down view

The case topics drill-down view provides supervisors with a holistic look into individual topics in reference to key business metrics, and can be valuable in understanding why end customers are contacting support.

To access the case topics drill down, select any metric value for the required topic, and then select **Details**.



Language availability for topics

The topics capability in the Customer Service historical analytics reports comes with a natural language understanding model that can understand the text semantics and

intent in the following languages:

- English
- French
- German
- Italian
- Japanese
- Portuguese
- Simplified Chinese
- Spanish

> **Note**
>
> While topic discovery isn't prevented and is still possible in languages that aren't listed above, there may be differences in what users experience if they leverage topics in unsupported languages.

See also

Dashboard overview
Summary dashboard
Agent dashboard
Manage report bookmarks

Historical analytics for unified routing in Customer Service

Article • 03/08/2023

With the introduction of unified routing, an advanced and elaborate set of capabilities are available for organizations to enhance their routing configurations. Supervisors and business administrators need metrics to track how these advanced routing capabilities are helping their businesses serve their customers.

In Customer Service, the report displays metrics pertaining to only those records that are routed using unified routing.

Unified routing report in Customer Service historical analytics

The Unified routing report provides routing-specific KPIs and metrics that can be used by supervisors and administrators to track the success of their routing strategy. They can also track the incorrectly routed work items and configurations and correct them to improve the routing effectiveness and thereby customer satisfaction.

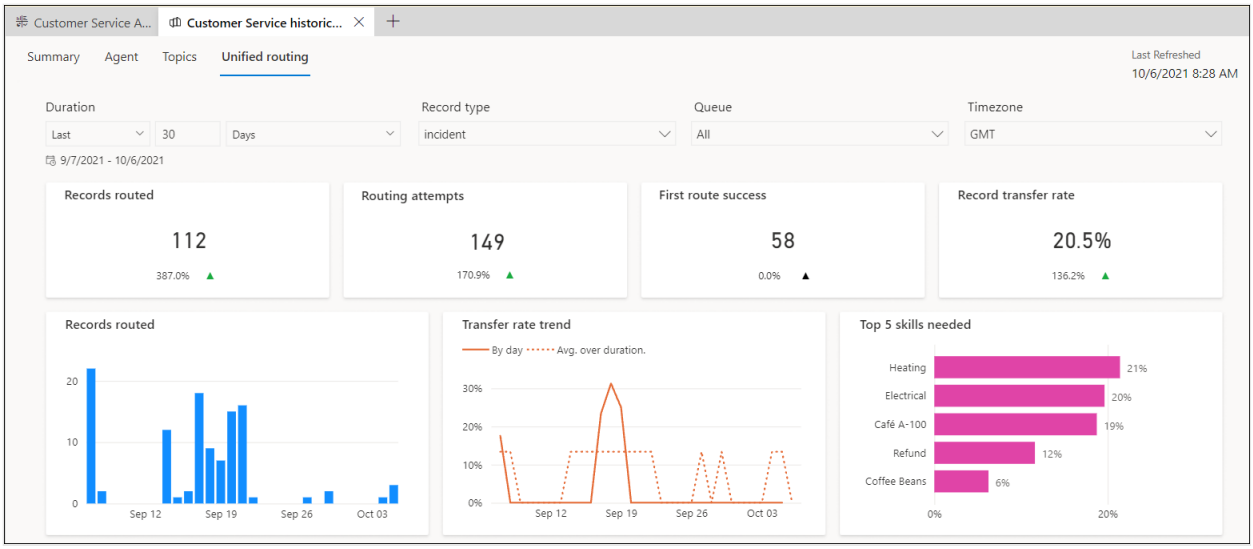
The report appears as a tab in the Customer Service historical analytics report if your administrator has enabled the corresponding setting on the **Insights** page in Customer Service Hub. You can access the report in Service. In the site map, select **Customer Service historical analytics**, and then select **Unified routing**.

Access the Unified routing dashboard

In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Customer Service historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Customer Service historical analytics**.

On the page that appears, select the dashboard.



The report can be filtered on the following:

- **Duration**: Filters the data by the selected value of day, week, or month.
- **Record type**: Filters the data for the selected record, such as a case, lead, or custom record. By default, the report is filtered on incident (case).
- **Queue**: Filters the data for the selected queue that's enabled for unified routing.
- **Time zone**: Filters the data for the selected time zone.

The unified routing report displays the following metrics.

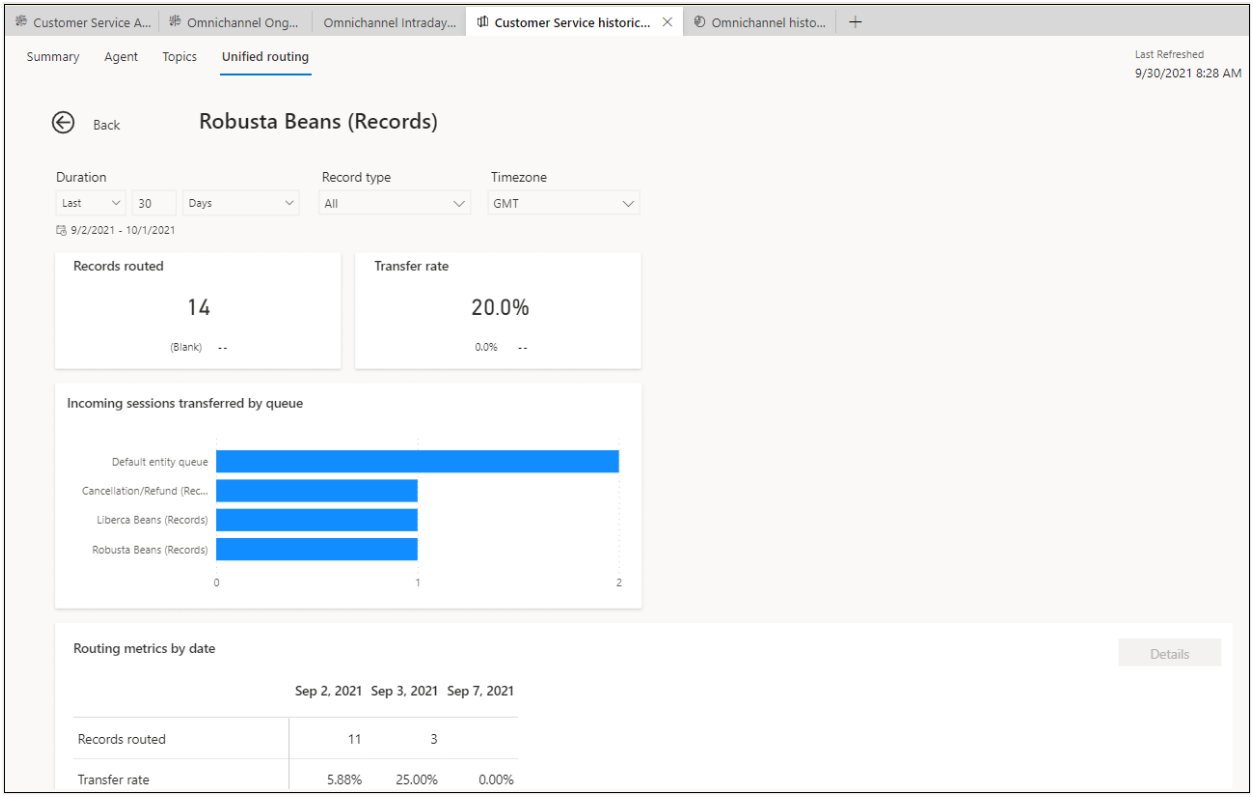
Metric	Description	Derivation
Records routed	Number of records that were routed.	Only records routed using unified routing are considered.
Routing attempts	Number of routing attempts across records that were routed.	Records that were attempted for routing using the "Save and Route" action will be considered as an attempt.
First route success	Number of records that were successfully routed in the first attempt.	Success for a push workstream is when the record is assigned to an agent. Success for a pick workstream is when the record is routed to a queue.
Records transfer rate	The percentage of records that were transferred to another agent or queue.	
Records routed	Day wise view of records that have been routed.	
Transfer rate trend	Percentage of sessions transferred out of the total sessions for the records routed.	

Metric	Description	Derivation
Top 5 skills needed	Top five skills required by the routed records.	

Queue drill-down view

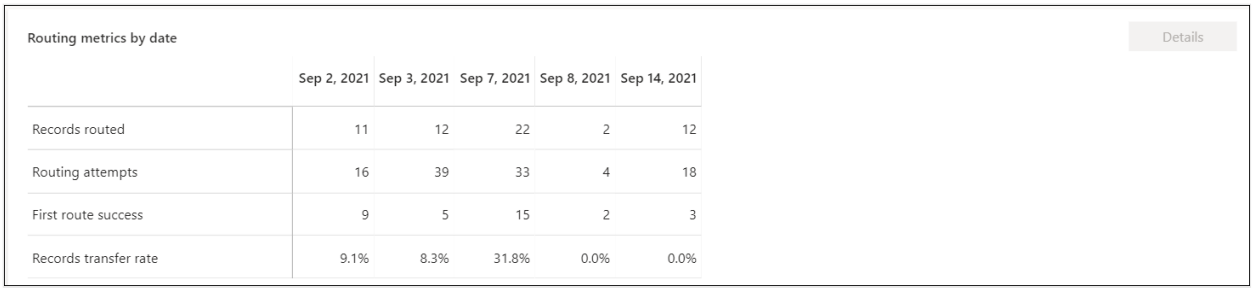
On the **Unified routing** report page, in **Routing metrics by queue**, select a queue, and then select **Details** to view the queue drill-down view. This view displays information about the records that were routed and the transfer rate for the items that were transferred to other queues.

The **Incoming sessions transferred by queue** metric displays the incoming sessions that were transferred from the selected queue to other queues.



Hourly drill-down view

On the **Unified routing** report page, the **Routing metrics by date** table displays the day wise data for the KPIs and the selected period in the **Duration** filter.


Routing metrics by date

Details

	Sep 2, 2021	Sep 3, 2021	Sep 7, 2021	Sep 8, 2021	Sep 14, 2021
Records routed	11	12	22	2	12
Routing attempts	16	39	33	4	18
First route success	9	5	15	2	3
Records transfer rate	9.1%	8.3%	31.8%	0.0%	0.0%

You can select a date, and then select **Details** to view the routing metrics by the hour.

See also

Enable Historical analytics for unified routing

Unified routing report in Omnichannel historical analytics

Diagnostics for unified routing

Manage report bookmarks

Omnichannel for Customer Service dashboards

Article • 03/31/2023

The insights dashboards in Omnichannel for Customer Service contain various charts and metrics to help you understand the factors that can improve customer service for your organization. Key performance indicators and visual breakdowns of your organization's support cases are coupled with AI-generated insights on cases, agents, and topics that contribute to overall trends. The dashboards provide a view into the support operation across the various channels.

You can make changes to the visual display of the dashboards and also save your personalized views as bookmarks.

Manage dashboards

To manage the dashboards, go to: Manage historical analytics reports in Omnichannel for Customer Service.

Omnichannel historical analytics reports

The following dashboard reports are available for Omnichannel historical analytics.

Summary

The Summary dashboard gives you an integrated view of the Power Virtual Agents bot and Omnichannel metrics. More information: Conversation dashboard

Conversation

The Conversation dashboard gives you a broad overview of the assisted support customer service experience in your organization. More information: Conversation dashboard

Queue

The Queue dashboard gives you a broad overview of the customer service experience in your organization by providing insights into how specific queues are operating. More

information: Queue dashboard

Agent

The Agent dashboard shows charts and KPIs that you can use to guide agents and understand overall agent performance. More information: Agent dashboard

Bot

The Bot dashboard shows charts and KPIs that you can use to understand how bots are playing a role in a support organization. More information: Bot dashboard

Conversation Topics

The Topics dashboard shows a detailed breakdown of conversations and their assigned topics. More information: Topics dashboard

Information that you need to know about analytics reports

Refresh reports, retain data

The reports refresh shows the following information.

- **Data refresh:** Occurs every 24 hours. The reports are available during the refresh process. The **Last updated** timestamp in the report pages indicates when the latest data was included in the report, and the time reflects the time zone that's set in your user preferences.
- **Custom refresh:** Isn't available.
- **Data refresh for inactive environments:** Data refresh is paused if the reports aren't used continuously for two weeks. When you access a report after a lengthy period of inactivity, the report will be refreshed in the next refresh cycle.
- **Data retention:** Data is stored for 24 months.

> **Note**
>
> A report might be blank if you've customized any of the listed entities or are using out-of-the-box entities.

See also

Introduction to Customer Service insights
Manage bookmarks
Customize visual display

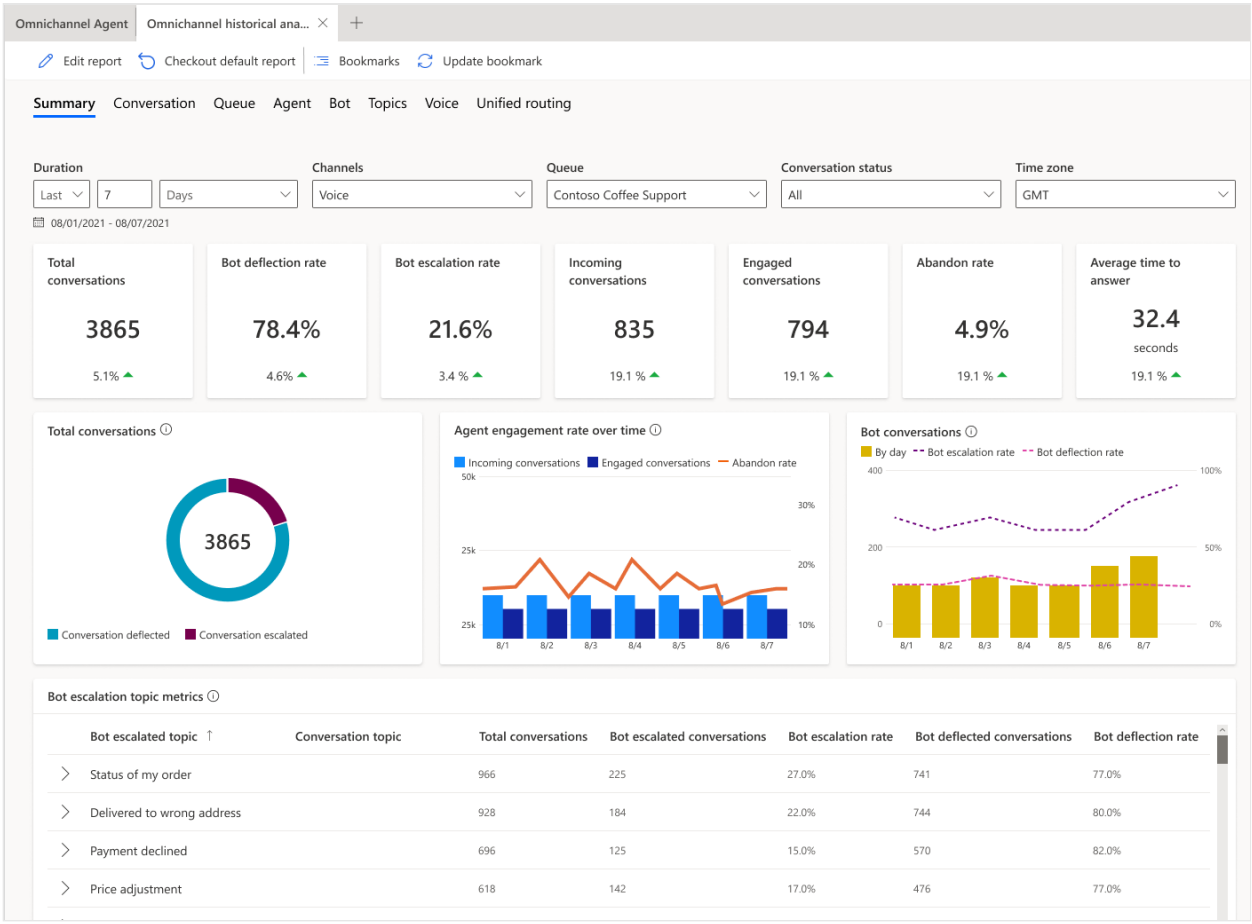
Omnichannel Summary dashboard

Article • 11/21/2022

The **Summary** dashboard provides a seamless end-to-end reporting of metrics across the customer service journey. This integrated analytics report aligns key metrics in Power Virtual Agents and Omnichannel for Customer Service.

With the Summary dashboard, Customer Service Managers or Supervisors can:

- Use the Power Virtual Agents bot metrics, such as escalation and deflection rate and agent metrics like engagement rate and abandon rate to get an overview of how customers interact with bots and bot performance.
- Evaluate how different bot topic areas and their corresponding agent conversation topics impact your organization's support performance.
- Get actionable insights to handle bot escalations and customer requests effectively, thereby improving customer satisfaction and decreasing costs.



Access the Summary dashboard

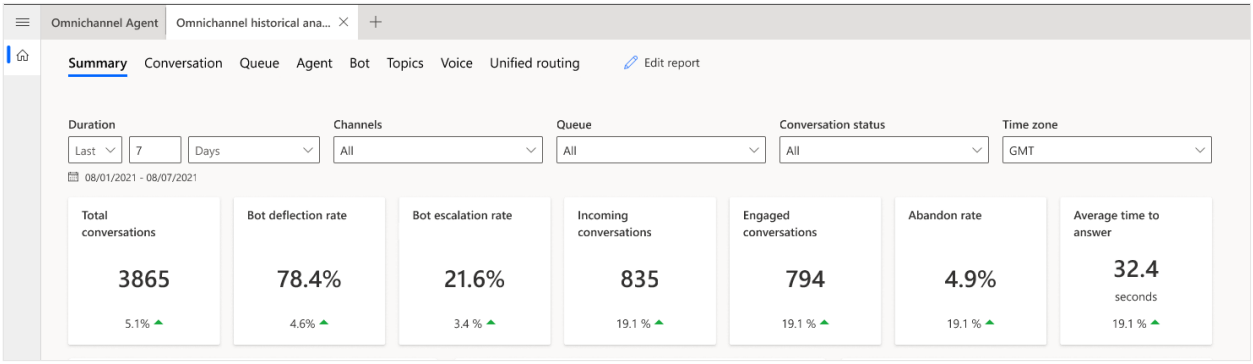
In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

On the page that appears, select the dashboard.

Report details

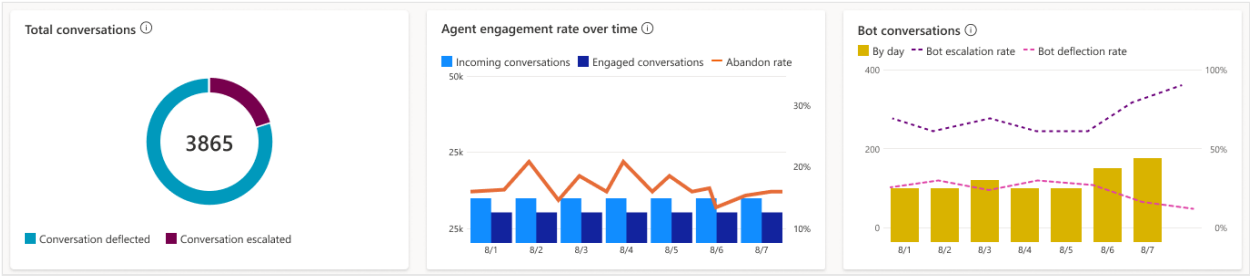
The report summarizes the KPIs for the specified time period and the percentage change over that period. You can filter these areas by duration, channel, queue, or conversation status.



KPI	Description
Total conversations	The number of conversations that were initiated by customers.
Bot deflection rate	The percentage of conversations engaged by bots that were resolved.
Bot escalation rate	The percentage of conversations engaged by bots that were escalated to a human agent.
Incoming conversations	The total number of conversations that are initiated by the customer and are presented to a human agent. Conversation escalated by the Power Virtual Agents bots is also included.
Engaged conversations	Offered conversations that are engaged by an agent. Customer-to-agent communication begins at this point.
Abandon rate	The percentage of conversations that are in a human agent's queue but aren't engaged by agents.
Average time to answer	The average time customers waited in the queue before being connected to an agent.

An up-and-down indicator below the value indicates the percent change in either a positive or negative direction.

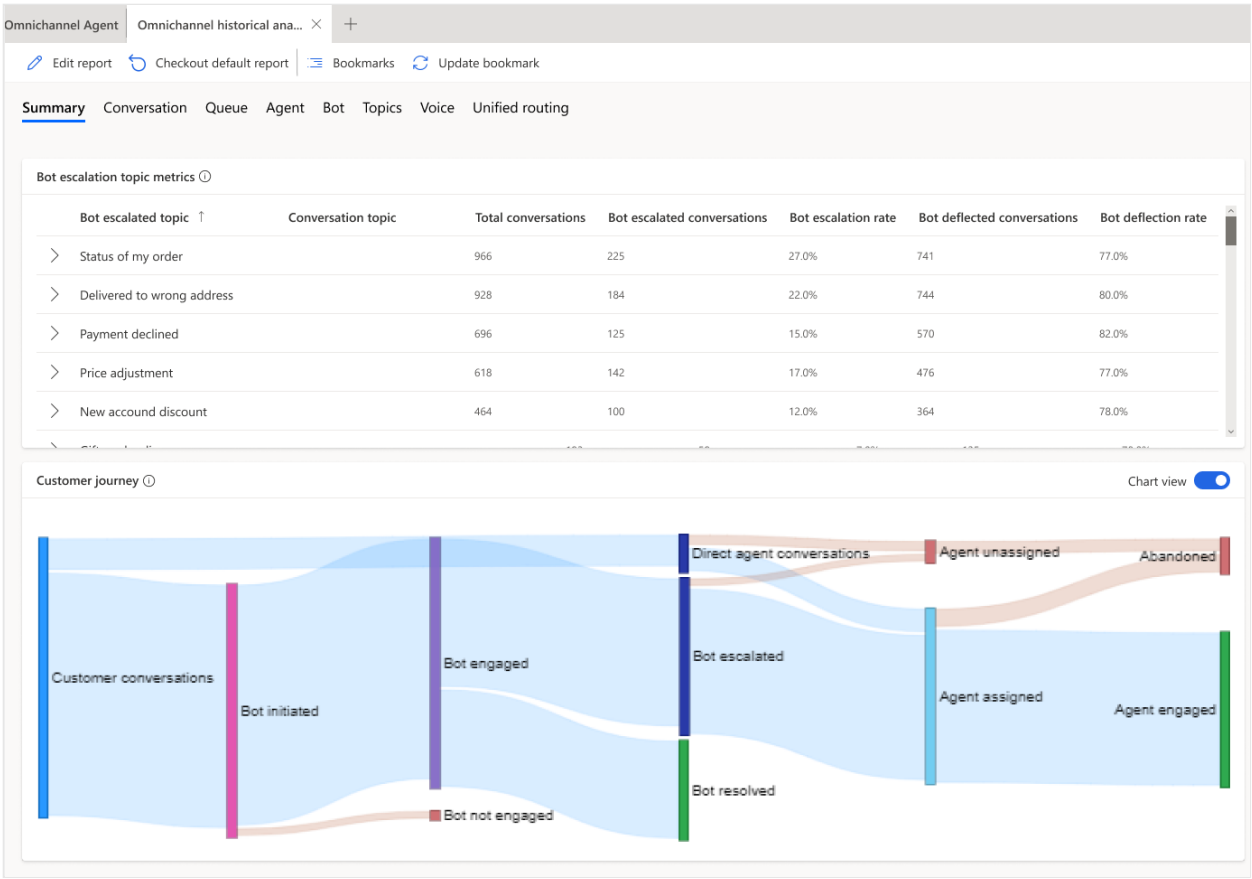
The following charts are displayed in the Summary dashboard.



Title	Description
Total conversations	A graphical view of the conversations that were initiated by the customer and were connected to a human agent directly, resolved by the Power Virtual Agents bot, or escalated by a bot to the human agent.
Agent engagement rate over time	A graphical view of the daily incoming conversations, conversations engaged by an agent, and abandoned conversations over time.
Bot conversations	A graphical view of the daily deflection and escalation rate and abandon rate over the specified time period.

Bot escalation topic metrics

The **Bot escalation topic metrics** section provides insights into the performance of individual bot topics and their key business metrics. Supervisors can drill down into a topic to view the corresponding agent conversation topics and analyze how a bot is resolving a topic versus how an agent is resolving an escalated conversation topic. This helps them better understand how different topic areas impact your organization's support performance.



To view further bot topics and their related metrics, go to Bot dashboard.

Language availability for topics

The topics capability in the Customer Service historical analytics reports comes with a natural language understanding model that can understand text semantics and intent in the following languages:

- English
- French
- German
- Italian
- Japanese
- Portuguese
- Simplified Chinese
- Spanish

> **Note**
>
> While topic discovery is enabled and still possible in languages that are not listed above, there may be differences in experience for users who leverage topics in unsupported languages.

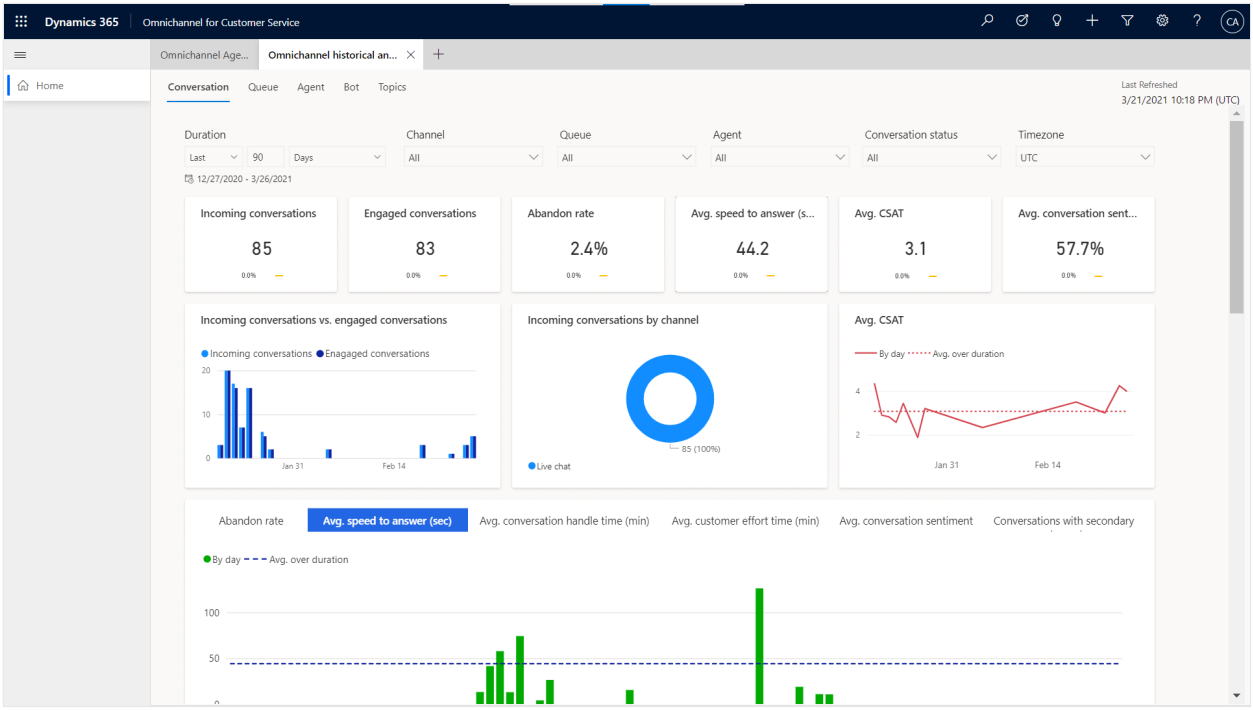
See also

Conversation dashboard
Dashboard overview
Agent dashboard
Bot dashboard
Manage report bookmarks

Conversation dashboard

Article • 11/24/2022

The Conversation dashboard gives you a broad overview of the customer service experience in your organization. It uses AI to surface insights into the topics that generate the highest volume and the topics that're emerging with the fastest increase in volume.



The dashboard includes a variety of charts with graphical views of your organization's key performance indicators (KPIs).

The charts for conversation volume drivers and emerging conversation volume by topic charts use natural language understanding to group support conversations as topics that are a collection of related conversations. These charts display the customer support topics that are generating the most volume and emerging topics that are increasing rapidly in volume, helping you identify areas for improvement that can have the greatest impact on support performance.

By default, the dashboard shows you KPIs for the past month and for all channels, queues, and agents in your system. You can use the data filtering options to select data for specific time periods, channels, queues, agents, conversation status, and timezones.

> **Note**
>
> If you switch to a different dashboard, the filter you specified will persist, and be applied to the data on all dashboards.

Access the Conversation dashboard

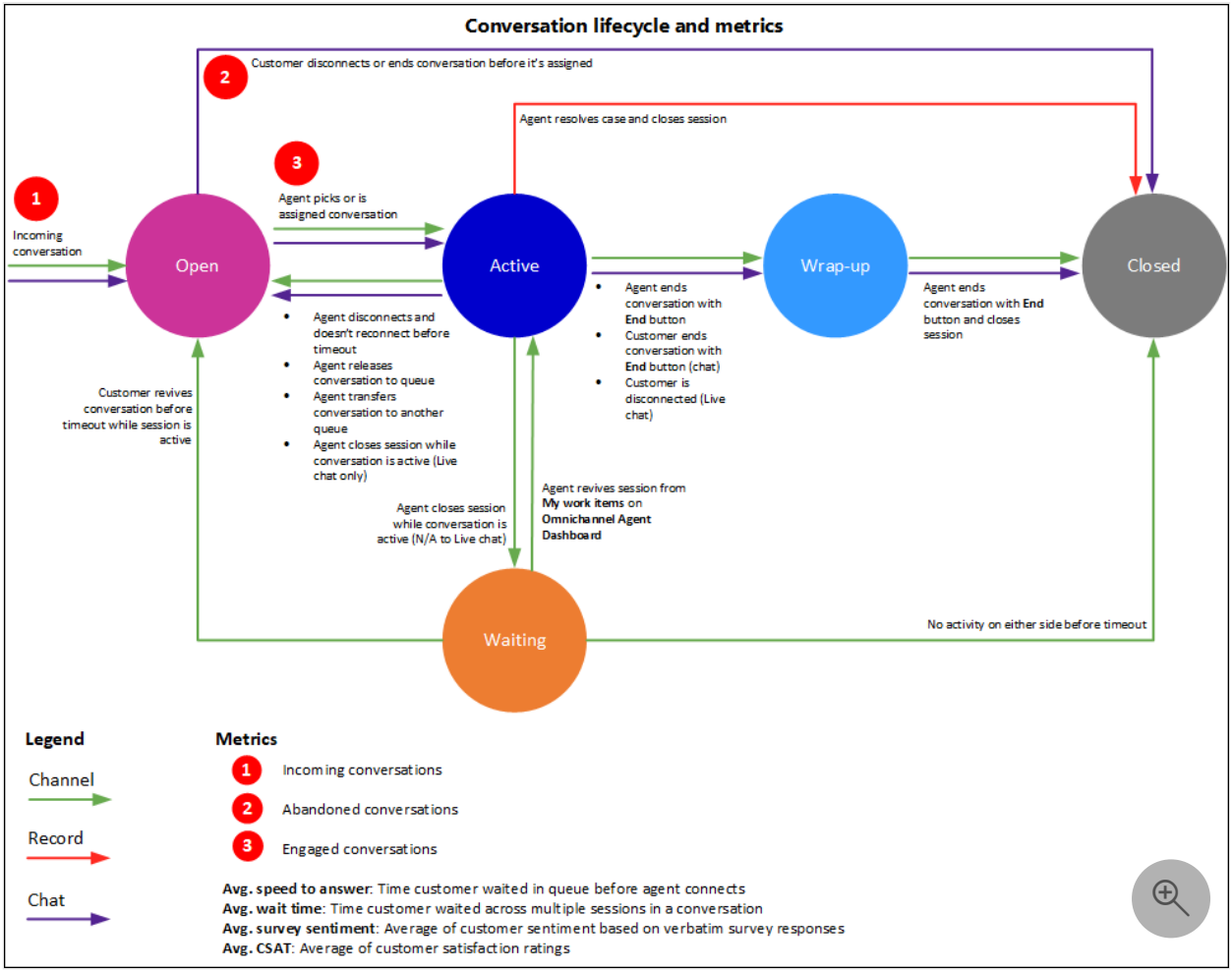
In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

On the page that appears, select the dashboard.

Report details

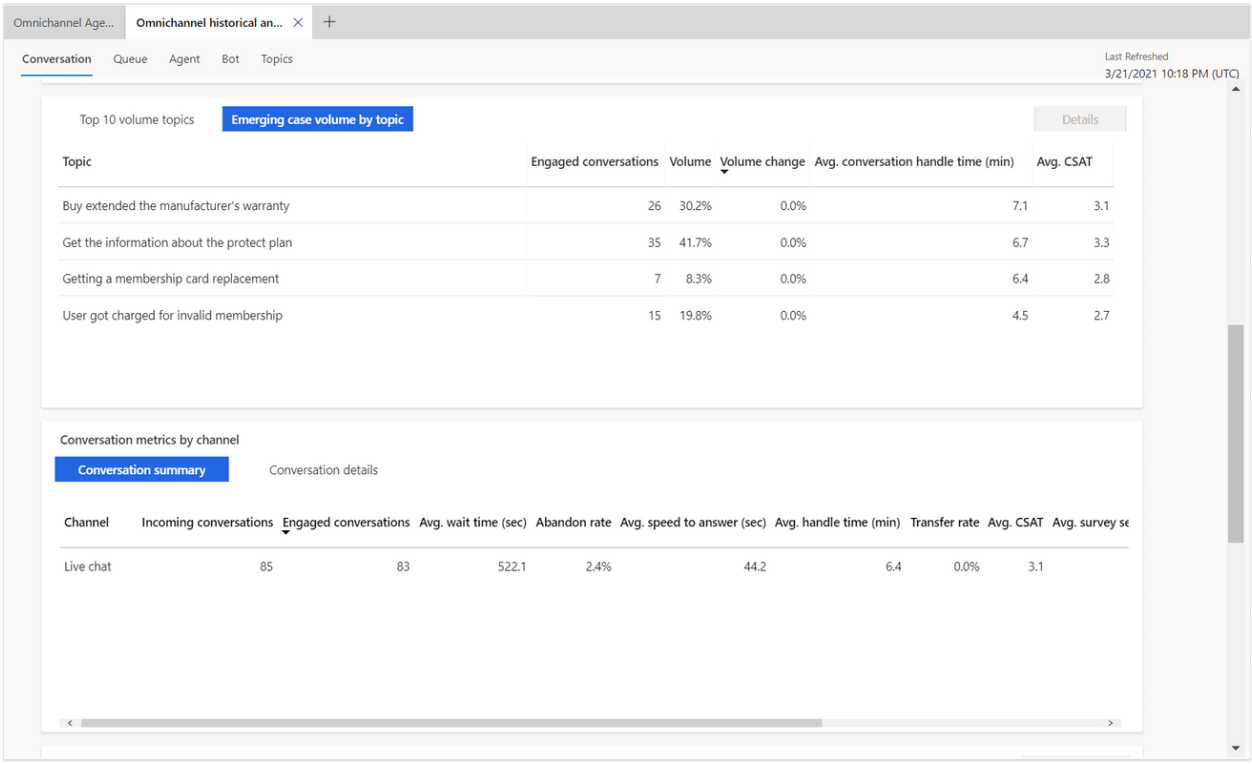
The conversation lifecycle and the metrics that can be derived in the different statuses is represented in the following diagram.



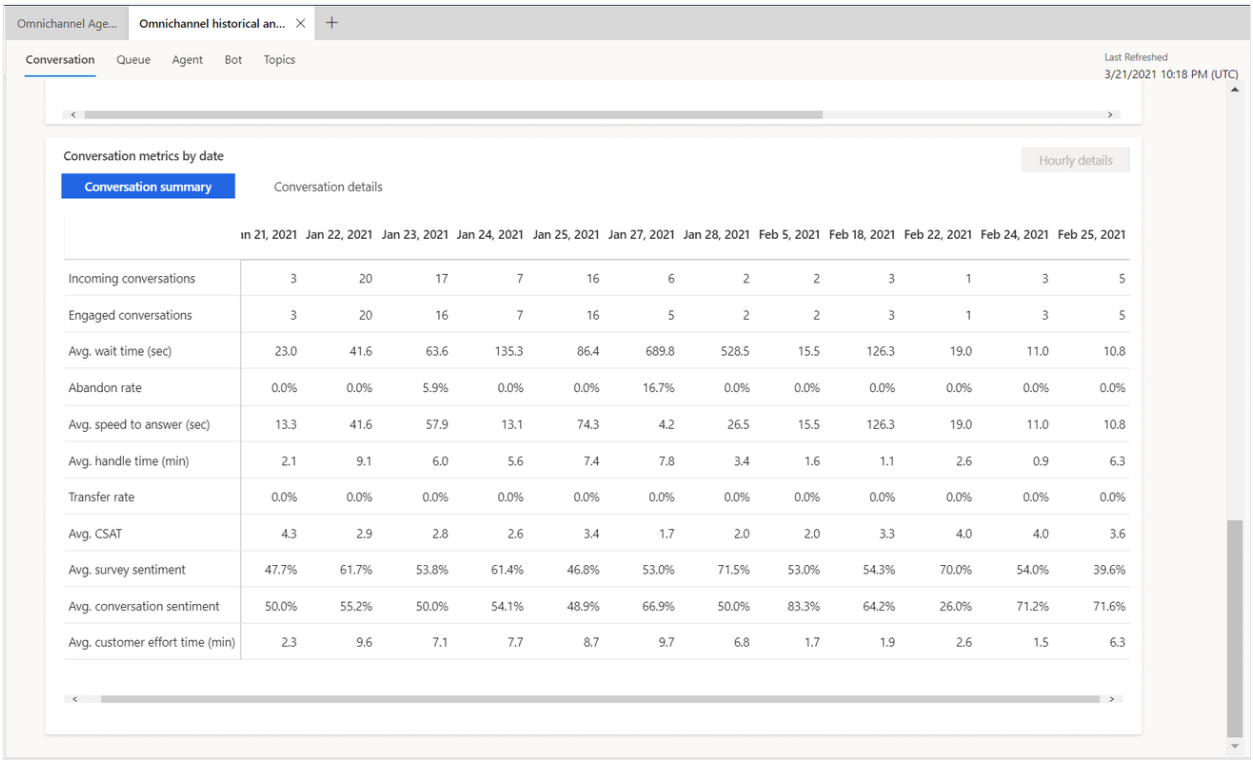
The following table lists the KPIs in the Conversation dashboard.

Metric	Description	Derivation

Metric	Description	Derivation
Incoming conversations	The number of conversations initiated by the customer that can be presented to a human agent.	All conversations are considered, except bot conversations.
Engaged conversations	Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point.	All conversations are considered.
Abandon rate	The percentage of conversations that aren't engaged by agents.	All conversations are considered.
Avg. speed to answer (seconds)	The average time customers waited in the queue before connecting to an agent. (time for acceptance)	Conversations engaged and conversations that are in the closed state are considered.
Avg. CSAT	The average of the customer satisfaction ratings provided by customers. Only available if Dynamics 365 Customer Voice has been configured as a post-conversation survey tool.	
Avg. conversation sentiment	The average sentiment score based on the customer's conversation experience. For information on how the sentiment data is derived, see Monitor real-time customer sentiment.	



Conversation charts are displayed as shown in the following image.

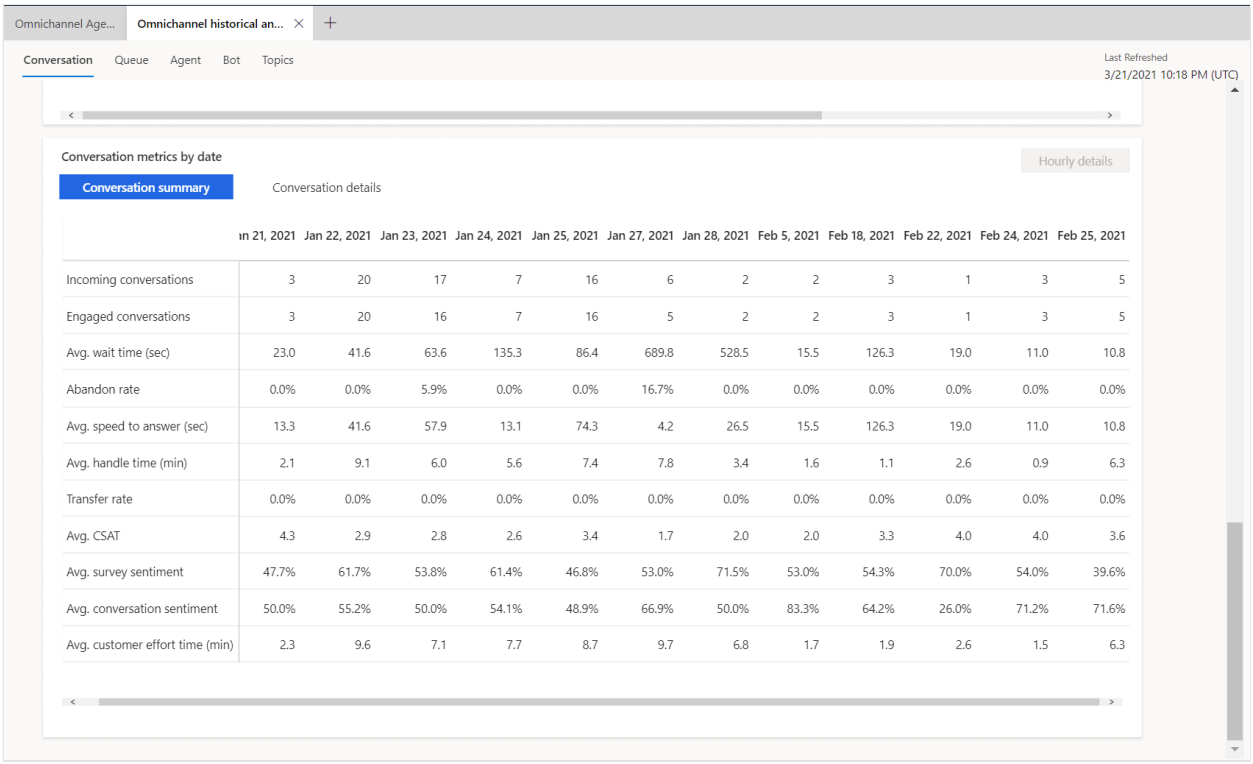


	ın 21, 2021	Jan 22, 2021	Jan 23, 2021	Jan 24, 2021	Jan 25, 2021	Jan 27, 2021	Jan 28, 2021	Feb 5, 2021	Feb 18, 2021	Feb 22, 2021	Feb 24, 2021	Feb 25, 2021
Incoming conversations	3	20	17	7	16	6	2	2	3	1	3	5
Engaged conversations	3	20	16	7	16	5	2	2	3	1	3	5
Avg. wait time (sec)	23.0	41.6	63.6	135.3	86.4	689.8	528.5	15.5	126.3	19.0	11.0	10.8
Abandon rate	0.0%	0.0%	5.9%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Avg. speed to answer (sec)	13.3	41.6	57.9	13.1	74.3	4.2	26.5	15.5	126.3	19.0	11.0	10.8
Avg. handle time (min)	2.1	9.1	6.0	5.6	7.4	7.8	3.4	1.6	1.1	2.6	0.9	6.3
Transfer rate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Avg. CSAT	4.3	2.9	2.8	2.6	3.4	1.7	2.0	2.0	3.3	4.0	4.0	3.6
Avg. survey sentiment	47.7%	61.7%	53.8%	61.4%	46.8%	53.0%	71.5%	53.0%	54.3%	70.0%	54.0%	39.6%
Avg. conversation sentiment	50.0%	55.2%	50.0%	54.1%	48.9%	66.9%	50.0%	83.3%	64.2%	26.0%	71.2%	71.6%
Avg. customer effort time (min)	2.3	9.6	7.1	7.7	8.7	9.7	6.8	1.7	1.9	2.6	1.5	6.3

The KPIs in the conversation chart are as follows.

Title	Description
Incoming conversations vs. engaged conversations	The number of conversations initiated by the customer versus the number of conversations that are accepted and engaged in by agents.
Incoming conversations by channel	The number of conversations initiated by the customer and presented to an agent, sorted by channel.
Avg. CSAT	The average of the customer satisfaction ratings provided by customers. Only available if Dynamics 365 Customer Voice has been configured as a post-conversation survey tool.
Abandon rate	The trend in percentage of conversations that aren't engaged by agents, by day.
Avg. speed to answer (sec)	The average time customers waited in the queue before connecting to an agent. (time for acceptance).
Avg. conversation handle time (min)	The average total conversation active time across engaged conversations.
Avg. customer effort time (min)	The average time from the start of a conversation to the start of the conversation wrap-up time.

Title	Description
Avg. conversation sentiment	The average of predicted customer sentiment in a given timeframe for a set queue or agent, which indicates the degree of positive sentiment expressed by customers at the end of their interaction.
Conversations with secondary channel	The breakdown of conversations across secondary channels.
Top 10 volume topics	The top 10 AI-discovered topics from conversation data sorted by conversation volume.
Emerging conversation volume by topic	The top emerging AI-discovered topics, from conversation data that featured the greatest increase in volume over the duration being evaluated.



	ın 21, 2021	Jan 22, 2021	Jan 23, 2021	Jan 24, 2021	Jan 25, 2021	Jan 27, 2021	Jan 28, 2021	Feb 5, 2021	Feb 18, 2021	Feb 22, 2021	Feb 24, 2021	Feb 25, 2021
Incoming conversations	3	20	17	7	16	6	2	2	3	1	3	5
Engaged conversations	3	20	16	7	16	5	2	2	3	1	3	5
Avg. wait time (sec)	23.0	41.6	63.6	135.3	86.4	689.8	528.5	15.5	126.3	19.0	11.0	10.8
Abandon rate	0.0%	0.0%	5.9%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Avg. speed to answer (sec)	13.3	41.6	57.9	13.1	74.3	4.2	26.5	15.5	126.3	19.0	11.0	10.8
Avg. handle time (min)	2.1	9.1	6.0	5.6	7.4	7.8	3.4	1.6	1.1	2.6	0.9	6.3
Transfer rate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Avg. CSAT	4.3	2.9	2.8	2.6	3.4	1.7	2.0	2.0	3.3	4.0	4.0	3.6
Avg. survey sentiment	47.7%	61.7%	53.8%	61.4%	46.8%	53.0%	71.5%	53.0%	54.3%	70.0%	54.0%	39.6%
Avg. conversation sentiment	50.0%	55.2%	50.0%	54.1%	48.9%	66.9%	50.0%	83.3%	64.2%	26.0%	71.2%	71.6%
Avg. customer effort time (min)	2.3	9.6	7.1	7.7	8.7	9.7	6.8	1.7	1.9	2.6	1.5	6.3

The KPIs for the conversation summary are as follows.

Conversation summary	Description
Incoming conversations	The number of conversations initiated by the customer and can be presented to a human agent
Engaged conversations	Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point

Conversation summary	Description
Avg. wait time (sec)	The average time customers waited before connecting to agents. This is similar to “speed to answer” but it includes wait time from each session within a conversation.
Abandon rate	The percentage of conversations that aren't engaged by agents.
Avg. speed to answer (sec)	The average time customers waited in the queue before connecting to an agent (time for acceptance).
Avg. handle time (min)	The average total conversation active time across engaged conversations.
Transfer rate	The percentage of conversations that are transferred to another agent or queue.
Avg. CSAT	The average of customer satisfaction ratings provided by customers. Only available if Dynamics 365 Customer Voice has been configured as a post-conversation survey tool.
Avg. survey sentiment	The average of customer sentiment based on verbatim provided in survey responses. Only available if Dynamics 365 Customer Voice has been configured as a post-conversation survey tool.
Avg. conversation sentiment	The average of predicted customer sentiment in each timeframe for a set queue or agent, which indicates the degree of positive sentiment expressed by customers at the end of their interaction.
Avg. customer effort time (min)	The average time from the start of the conversation to the start of the conversation wrap up time.

This following table displays the conversation details and their descriptions.

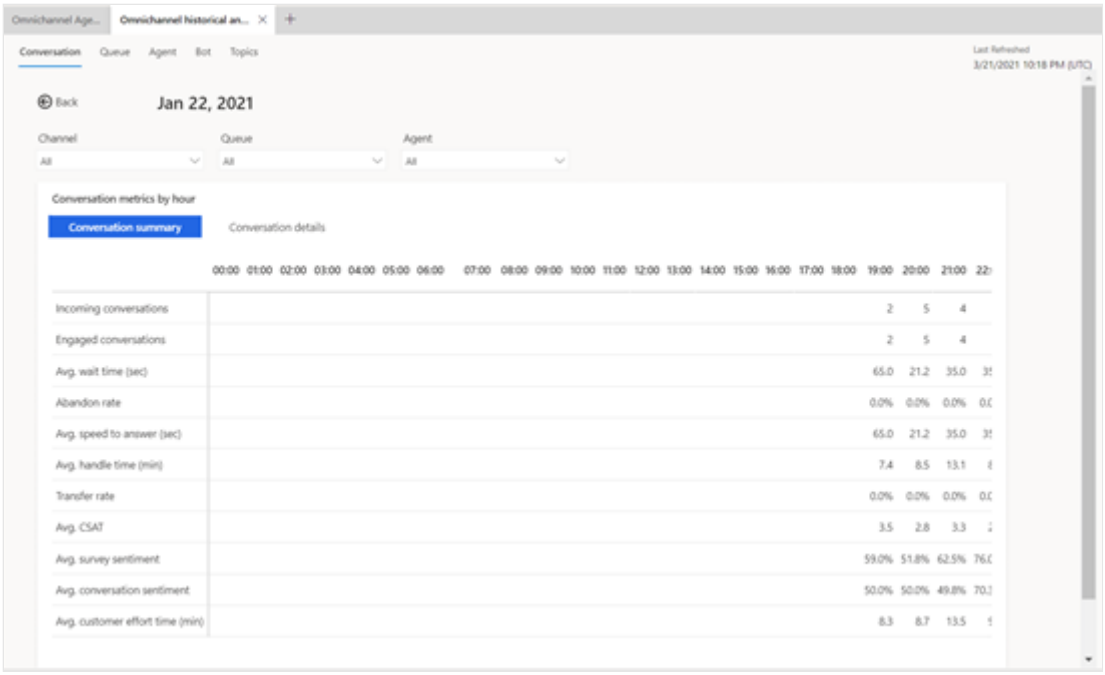
Conversation details	Description
Avg. session per conversation	The average number of sessions in each conversation
Avg. conversation time (min)	The average total time to complete conversations across engaged conversations.
Avg. time for first response (min)	The average total time for first responses across engaged conversations.

Conversation details	Description
Avg. response time (min)	The average total time for first responses on conversations.
Avg. conversation active time (min)	The average time that conversations remain active across engaged conversations.
Avg. conversation inactive time (min)	The average time that conversations remain inactive across engaged conversations.
Avg. conversation wrap-up time (min)	The average time that conversations take to wrap up across engaged conversations.
Avg. incoming messages	The average of the total number of messages sent by customers
Avg. outgoing messages	Average of the total number of messages sent as a response from an agent. This doesn't include any consult/monitoring messages a supervisor/team lead has sent to an agent.
Incoming messages	The average of the total number of messages sent by customers
Outgoing messages	The average of the total number of messages sent as a response from an agent. This doesn't include any consult or monitoring messages that a supervisor or team lead has sent to an agent.

Conversation hourly details drill down view

The Conversation hourly details drill down view provides more granular insight into the hour-by-hour breakdown of key conversation metrics within the contact center. The metrics for conversation summary and conversation details metrics are the same as the day-by-day view, ensuring that supervisors can consistently analyze their contact center operation regardless of desired duration granularity.

To view the drill-down, select any single metric value on the day you're interested in, and then select **Hourly details**.



See also

Dashboard overview

Agent dashboard

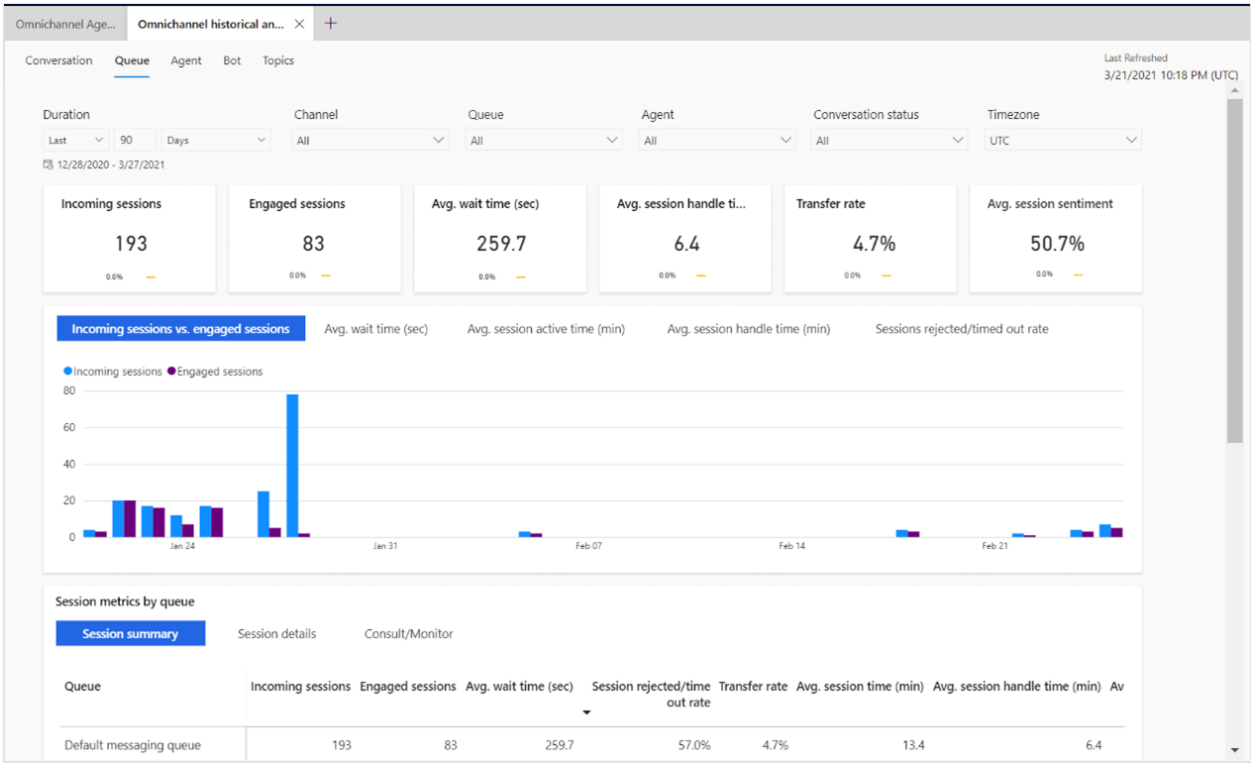
Bot dashboard

Manage report bookmarks

Queue dashboard

Article • 10/12/2022

The Queue dashboard gives you a broad overview of the customer service experience in your organization by providing insights into how specific queues are operating.



By default, the dashboard shows key performance indicators (KPIs) for the past month and for all channels, queues, and agents in your system. You can use the data filtering options to select data for specific time periods, channels, queues, agents, conversation status, and time zone. To filter data by duration, channel, queue, agent, conversation status, or time zone, select a value from the respective dropdown list.

> **Note**
>
> If you switch to a different dashboard, the filter you specified will persist and be applied to the data on all dashboards.

Access the Queue dashboard

In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.

- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

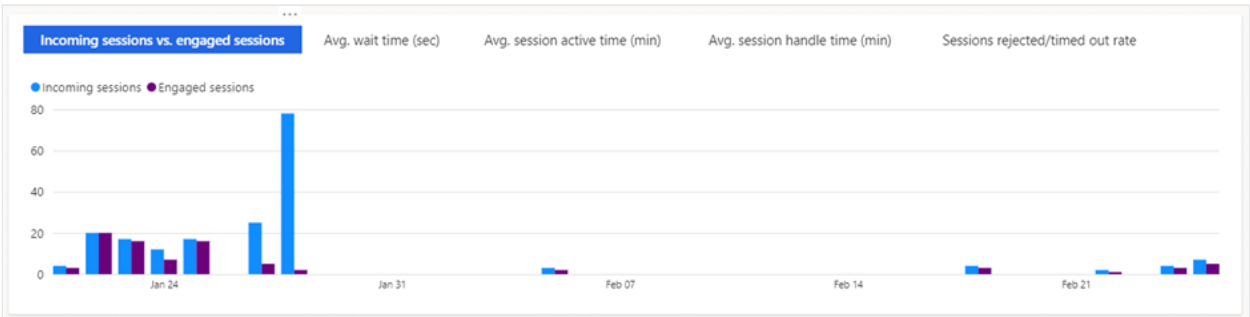
On the page that appears, select the dashboard.

Report details

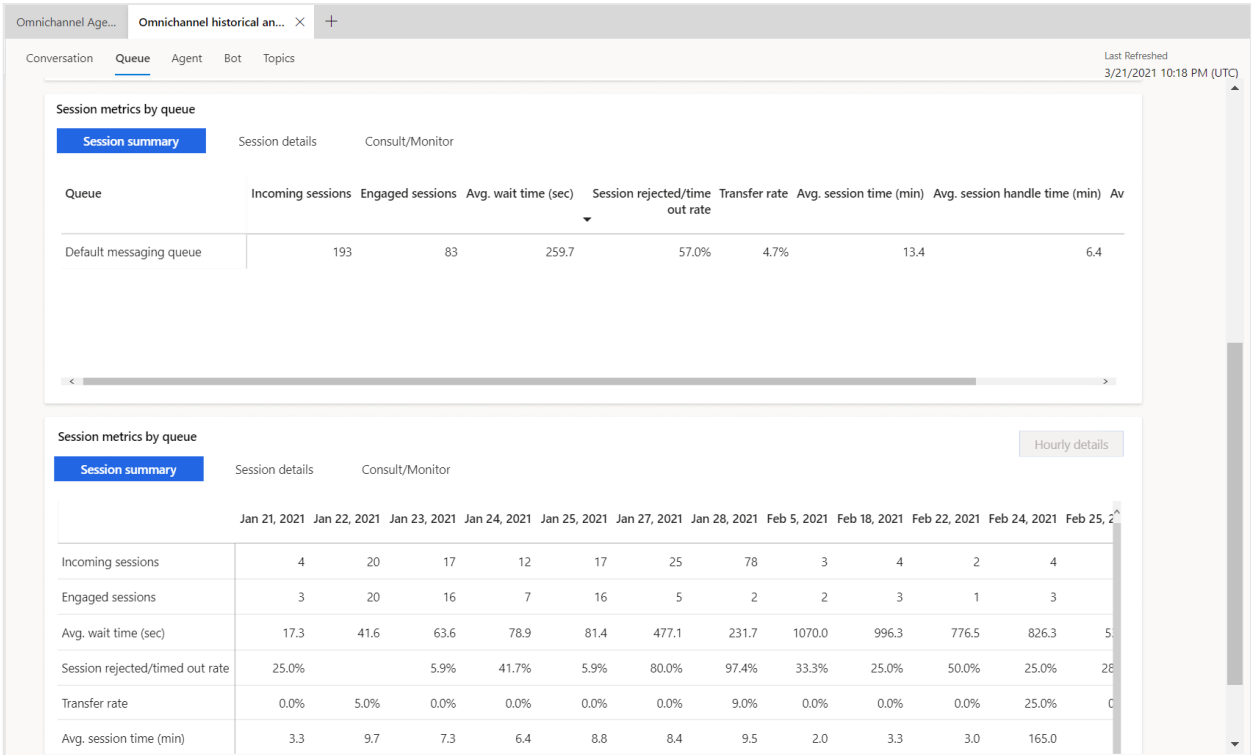
The following KPIs are displayed in the Queue dashboard.

KPI	Description
Incoming sessions	The total number of sessions initiated by customers.
Engaged sessions	The number of sessions presented to an agent that were accepted.
Avg. wait time (sec)	The average time customers waited before connecting to an agent. It's similar to "speed to answer," but this metric includes the wait time from each session within a conversation.
Avg. session handle time	The total session active time across engaged sessions.
Transfer rate	The percentage of conversations that were transferred to another agent or queue.
Avg. session sentiment	The average predicted customer sentiment for a given session.

The following charts are displayed in the Queue dashboard.



Title	Description
Incoming session vs engaged session	The total number of sessions initiated by customers versus the number of sessions initiated and accepted by an agent.
Avg. wait time (sec)	The average time customers waited before connecting to an agent. It's similar to "speed to answer," but this metric includes wait time from each session within a conversation.
Avg. session active time (min)	The average total session active time across engaged conversations.
Avg. session handle time (min)	The average total session handle time across engaged conversations.
Sessions rejected/timed out rate	The number of sessions presented to an agent that weren't accepted.



Session summary	Description
Incoming sessions	The number of sessions initiated by a customer

Session summary	Description
Engaged sessions	The number of sessions accepted by an agent.
Avg. wait time (sec)	The average time customers waited before connecting to agents. This is similar to "speed to answer," but it includes wait time from each session within a conversation.
Session rejected/timed out rate	The number of sessions presented to an agent that weren't accepted.
Transfer rate	The percentage of conversations that were transferred to another agent or queue.
Avg. session time (min)	The average time, from session start to end, for engaged sessions.
Avg. session handle time (min)	The average of the total session active time across engaged sessions.
Avg. session sentiment	The average predicted customer sentiment for a given session.

Session details	Description
Avg. session active time (min)	The average total session active time across engaged conversations.
Avg. session inactive time (min)	The average total session inactive time across engaged sessions.
Avg. incoming messages	The average total number of incoming messages from the customer, per session.
Avg. outgoing messages	The average total number of outgoing messages from the customer, per session.
Incoming messages	The total incoming messages from the customer, per session.
Outgoing messages	The total outgoing messages per session from customer, per session.

Consult/ Monitor	Descriptions
Consult sessions	Number of sessions where the agent has participated in consult mode.
Avg consult time (min)	Average time an agent spent during a session in consult mode.

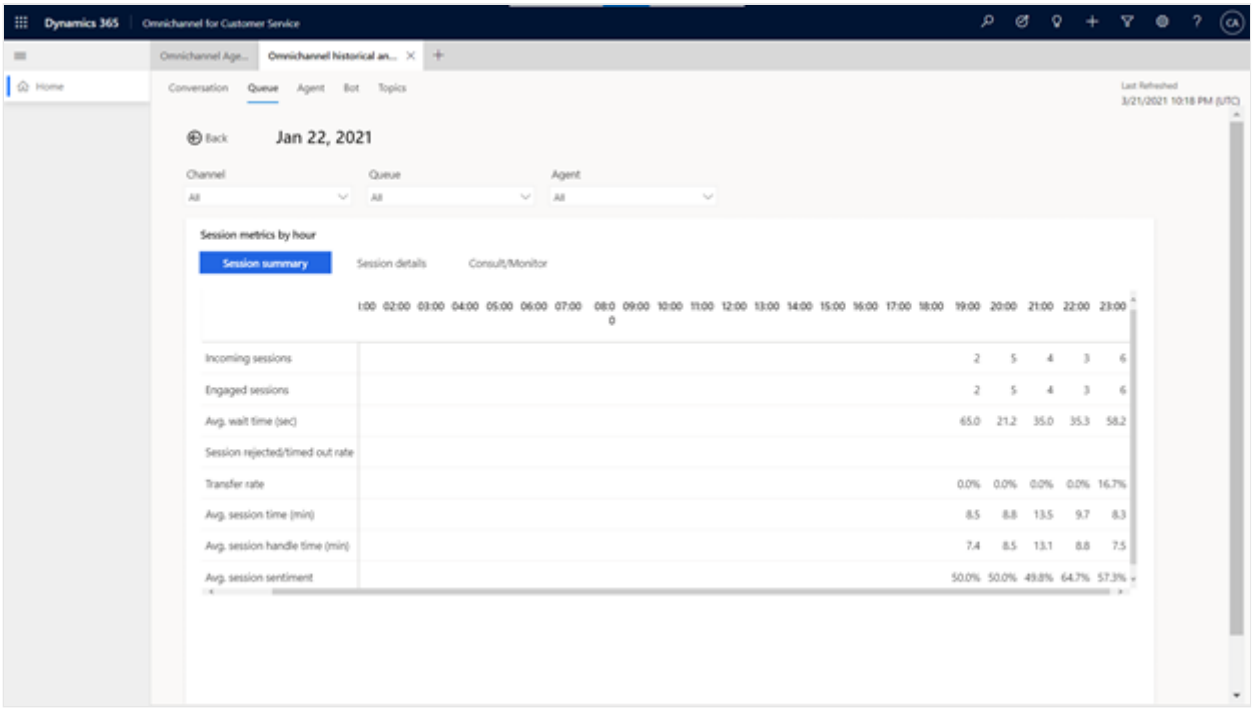
Consult/ Monitor	Descriptions
Monitor sessions	Number of sessions where the agent has participated in monitor mode
Avg monitor time (min)	Average time agent spent on a session in monitoring mode

A blue upward triangle next to the value indicates that the percentage has changed in a positive direction. A red downward triangle indicates that the percentage has changed in a negative direction.

Queue hourly details drill-down view

The "queue hourly details drill-down" view provides a more granular insight into the hour-by-hour breakdown of key conversation metrics within the contact center. Metrics for the conversation summary and conversation details are the same as the day-by-day view, ensuring that supervisors can consistently analyze their contact center operation regardless of duration granularity.

To view the drill-down report, select any single metric value on the required day, then select **Hourly details**.



See also

Conversation dashboard
Dashboard overview
Agent dashboard
Bot dashboard

Conversation Topics dashboard
Manage report bookmarks

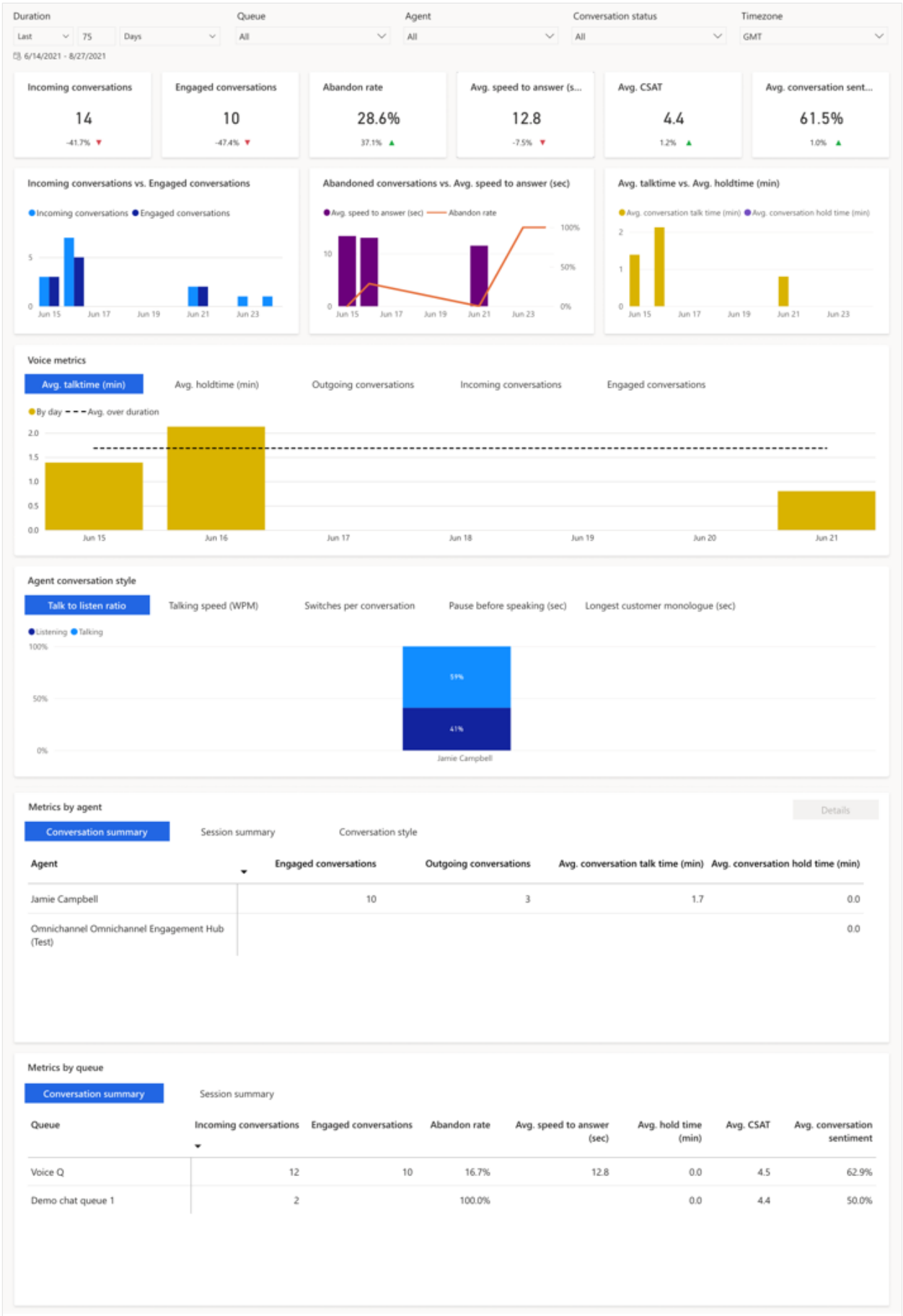
Voice channel historical analytics, reports, and call insights

Article • 04/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

The Voice analytics report provides comprehensive information on the overall performance of customer support across the voice channel. The reports provide administrators and supervisors with a visualization and ability to filter across channels, queues, agents, and date ranges to help better understand performance and troubleshoot problem areas.



Access the Voice dashboard

In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

On the page that appears, select the dashboard.

Report details

The following KPIs are displayed in the Voice dashboard.

Metric	**Definition (historical)**
Incoming conversations	The number of conversations initiated by the customer and can be presented to a human agent.
Engaged conversations	The conversations that the agent was engaged in. Customer-to-agent communication can begin at this point.
Abandon rate	Percentage of conversations that are not engaged by agents.
Average wait time	The average time customers waited before connecting to agents. Similar to "speed to answer", but includes time waited on each session within a conversation.
Average Speed to answer (sec)	The average time customers waited in the queue before connecting to an agent (the time for acceptance).
Avg. CSAT **Note:** Currently unavailable.	The average of customer satisfaction ratings provided by customers.
Avg. Conversation sentiment	The average sentiment score based on the verbatim provided in customer voice survey.
Avg. handle time	The average time that an agent spent on a conversation.
Transfer rate	The percentage of times a conversation was transferred from one agent to another agent.
Avg. customer effort	The time that a customer spent on a conversation to get their issue resolved.

Metric	Definition (historical)
Avg. sessions per conversation	The average sessions created and engaged for each conversation engaged.

The following report includes conversation intelligence, which uses analytics and data science to gather data from agent call recordings and Omnichannel for Customer Service. Conversation intelligence analyzes the data to provide you with the information and insights to intelligently manage your support team and proactively coach agents.

Back

Jamie Campbell

Duration: Last 75 Days (6/14/2021 - 8/27/2021) | Queue: All | Conversation status: All | Timezone: GMT

Engaged conversations	Engaged sessions	Avg. session handle time	Transfer rate	Avg. CSAT	Avg. session sentiment
10	10	33.4	0.0%	4.2	62.9%
66.7% ▲	66.7% ▲	2539.2% ▲	-100.0% ▼	-10.3% ▼	-6.3% ▼

Voice metrics

Avg. talktime (min) | Avg. holdtime (min) | Outgoing conversations | Incoming conversations | Engaged conversations

Agent conversation style

Talk to listen ratio | Talking speed (WPM) | Switches per conversation | Pause before speaking (sec) | Longest customer monologue (sec)

Associated conversations by topic

Search

Topic	Conversation ID	Conversation title	Engaged conversations	Avg. conversation handle time (min)	Avg. CSAT	Avg. conversation sentiment	Date created (UTC)
Undefined topic	1c0367c0-5ac7...	+14087442123: Voice WS	1	2.1	4.9	83.1%	6/15/2021 6:22:50 PM
	476c526c-20fb-...	+14256238122: Voice WS	1	1.3	4.5	50.0%	6/15/2021 12:26:38 AM
	5a13b022-4620...	Visitor: Outbound Profile	1	0.7	4.5	50.0%	6/21/2021 8:47:01 PM
	5ca97756-1d1e...	+14087442123:	1	4.7	4.9	83.1%	6/16/2021

Agent metrics by date

Hourly details

Sessions | Session details | Consult/Monitor | Availability

	Jun 15, 2021	Jun 16, 2021	Jun 17, 2021	Jun 21, 2021
Engaged sessions	3	4	1	2
Session rejected/timed out rate		84.6%	99.8%	33.3%
Transfer rate	0.0%	0.0%	0.0%	0.0%
Avg. session time (min)	108.3	2.5	1.0	0.0
Avg. session handle time (min)	107.7	2.4	0.1	0.5
Avg. session talktime (min)	107.7	2.4	0.2	0.5
Avg. session holdtime (min)	0.6	0.8	0.0	0.0
Avg. session sentiment	63.5%	65.7%		50.0%

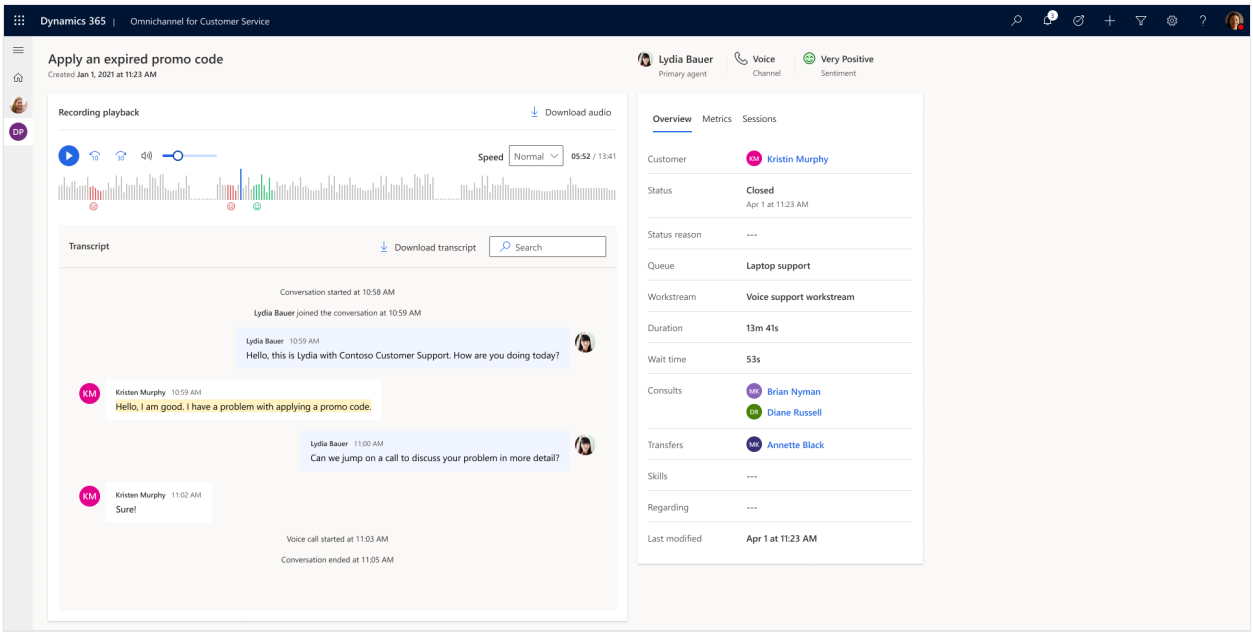
The following metrics are available for the agent conversation style.

Metric	Definition
Talk to listen ratio	The average listen and talk ratio of agent in conversations with customers.
Talking speed (WPM)	The average number of words used per minute by agent.
Switches per conversation	The average exchanges between an agent and a customer in a conversation; the number of times the conversation switched from one person to another. This is a sign of engagement during conversations.
Pause before speaking (sec)	The milliseconds the agent paused before responding to customer queries; indicates agent's patience.
Longest customer monologue (sec)	The longest monologue by the customer with an agent; indicates that the agent is asking good questions and understanding customer needs.

Call insights

Supervisors can look into each topic, and view the CSAT and sentiment to see coaching opportunities. Supervisors can view details of a conversation by drilling through the topics and selecting a conversation title.

Supervisors can also see entire transcripts to understand the conversation style and get precise verbatim used so that they can make informed decisions about training requirements for the agent.



See also

Introduction to the voice channel

Provision and set up the voice channel

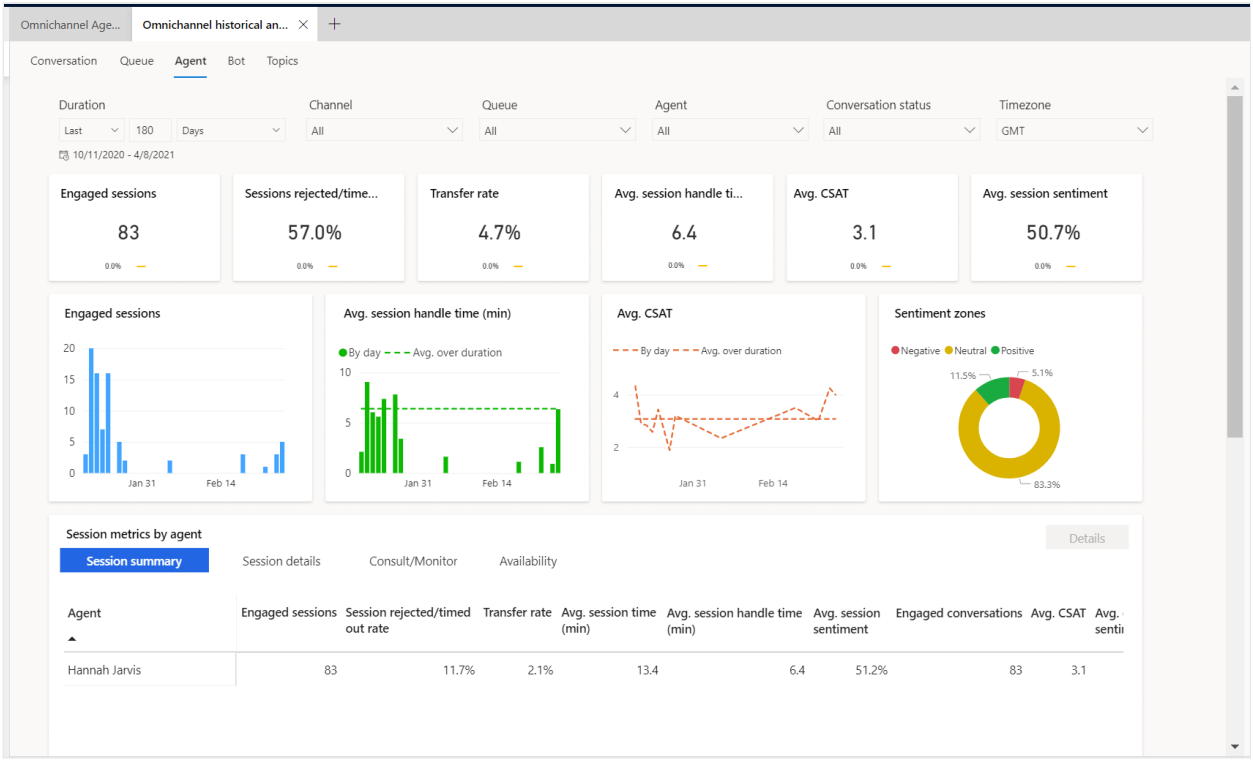
View voice calls usage

Agent dashboard

Article • 11/24/2022

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

The Agent dashboard shows charts and KPIs that you can use to guide agents and understand overall agent performance.



Access the Agent dashboard

In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

On the page that appears, select the dashboard.

Report details

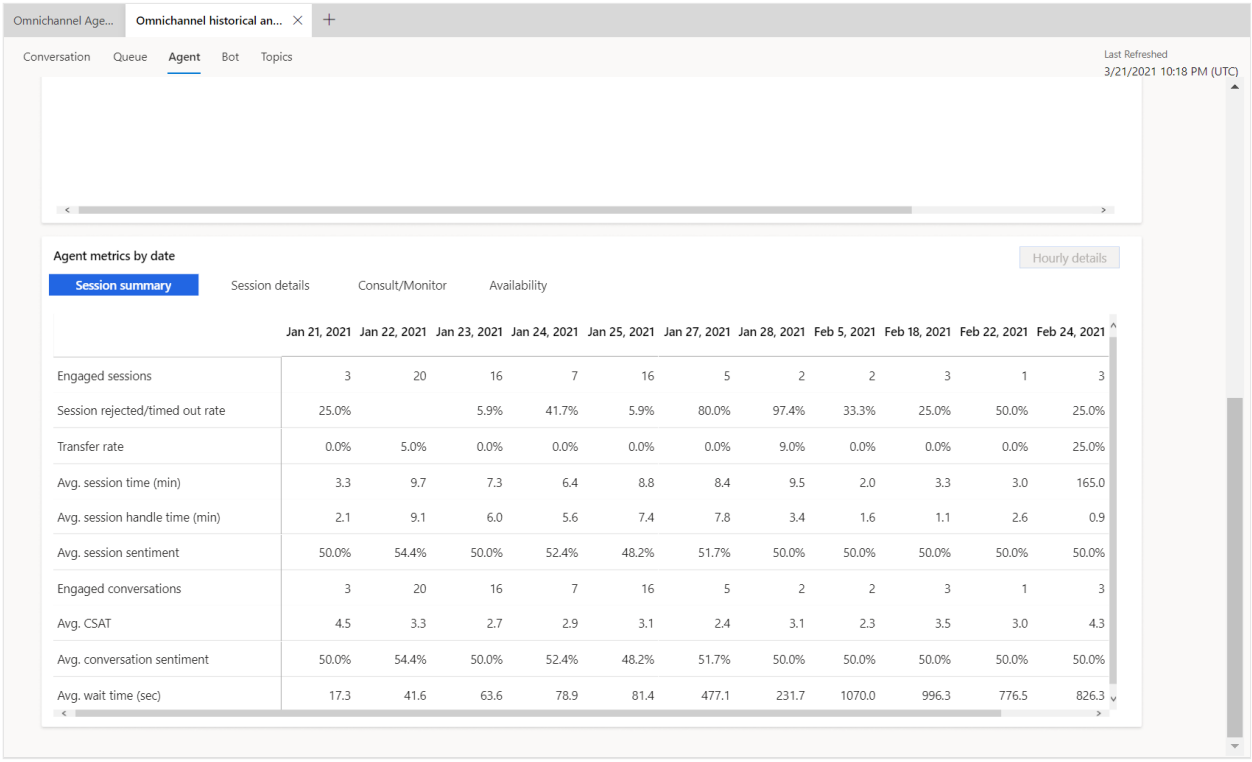
The reports summarize the KPIs for the specified time period and percentage change over a period of time. You can filter these areas by duration, channel, queue, agent, conversation status, and time zone.

KPI	Description
Engaged sessions	The number of sessions accepted by an agent.
Rejected/ timed-out sessions rate	The number of sessions presented to an agent and not accepted.
Transfer rate	The percentage of conversations that are transferred to another agent/queue.
Avg. session handle time	The average total session active time across engaged sessions.
Avg. CSAT	The average of customer satisfaction ratings provided by customers. Only available if Dynamics 365 Customer Voice has been configured as a post conversation survey tool.
Avg session sentiment	The average predicted sentiment of a customer based on the conversation transcript from the session. For information on how the sentiment data is derived, see Monitor real-time customer sentiment.

The charts display the following metrics.

Title	Description
Engaged sessions	The number of sessions accepted by an agent, by day

Title	Description
Avg. session handle time	The average amount of time an agent actively spends on a session, by day.
Avg. CSAT	The customer CSAT trend, based on Dynamics 365 Customer Voice survey responses.
Sentiment zones	The breakdown of customer sentiment across sessions by level.



	Jan 21, 2021	Jan 22, 2021	Jan 23, 2021	Jan 24, 2021	Jan 25, 2021	Jan 27, 2021	Jan 28, 2021	Feb 5, 2021	Feb 18, 2021	Feb 22, 2021	Feb 24, 2021
Engaged sessions	3	20	16	7	16	5	2	2	3	1	3
Session rejected/timed out rate	25.0%		5.9%	41.7%	5.9%	80.0%	97.4%	33.3%	25.0%	50.0%	25.0%
Transfer rate	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%	0.0%	0.0%	25.0%
Avg. session time (min)	3.3	9.7	7.3	6.4	8.8	8.4	9.5	2.0	3.3	3.0	165.0
Avg. session handle time (min)	2.1	9.1	6.0	5.6	7.4	7.8	3.4	1.6	1.1	2.6	0.9
Avg. session sentiment	50.0%	54.4%	50.0%	52.4%	48.2%	51.7%	50.0%	50.0%	50.0%	50.0%	50.0%
Engaged conversations	3	20	16	7	16	5	2	2	3	1	3
Avg. CSAT	4.5	3.3	2.7	2.9	3.1	2.4	3.1	2.3	3.5	3.0	4.3
Avg. conversation sentiment	50.0%	54.4%	50.0%	52.4%	48.2%	51.7%	50.0%	50.0%	50.0%	50.0%	50.0%
Avg. wait time (sec)	17.3	41.6	63.6	78.9	81.4	477.1	231.7	1070.0	996.3	776.5	826.3

Session summary	Description
Engaged sessions	The number of sessions presented to an agent and accepted.
Session rejected/timed out rate	The number of sessions presented to an agent and not accepted.
Transfer rate	The number of sessions transferred by an agent.
Avg. session time (min)	The average time of the total session duration across engaged sessions.
Avg. session handle time (min)	The average of the total session active time across engaged sessions.
Avg. session sentiment	The average predicted sentiment of the customer across engaged sessions.

Session summary	Description
Engaged conversations	The number of conversations presented to an agent and accepted.
Avg. CSAT	The average CSAT score provided by customers from Customer Voice survey responses.
Avg. conversation sentiment	The average predicted sentiment of the customer across engaged conversations.
Avg. wait time (sec)	The average time customers waited before connecting to agents. This is similar to “speed to answer” but it includes wait time from each session within a conversation.

Session details	Description
Avg. session active time (min)	The average total session active time across engaged conversations.
Avg. session inactive time (min)	The average total session inactive time across engaged sessions.
Avg. incoming messages	The average total number of incoming messages from a customer per session.
Avg. outgoing messages	The average total number of outgoing messages from an agent per session.
Incoming messages	Total incoming messages from the customer, per session.
Outgoing messages	Total outgoing messages from an agent, per session.

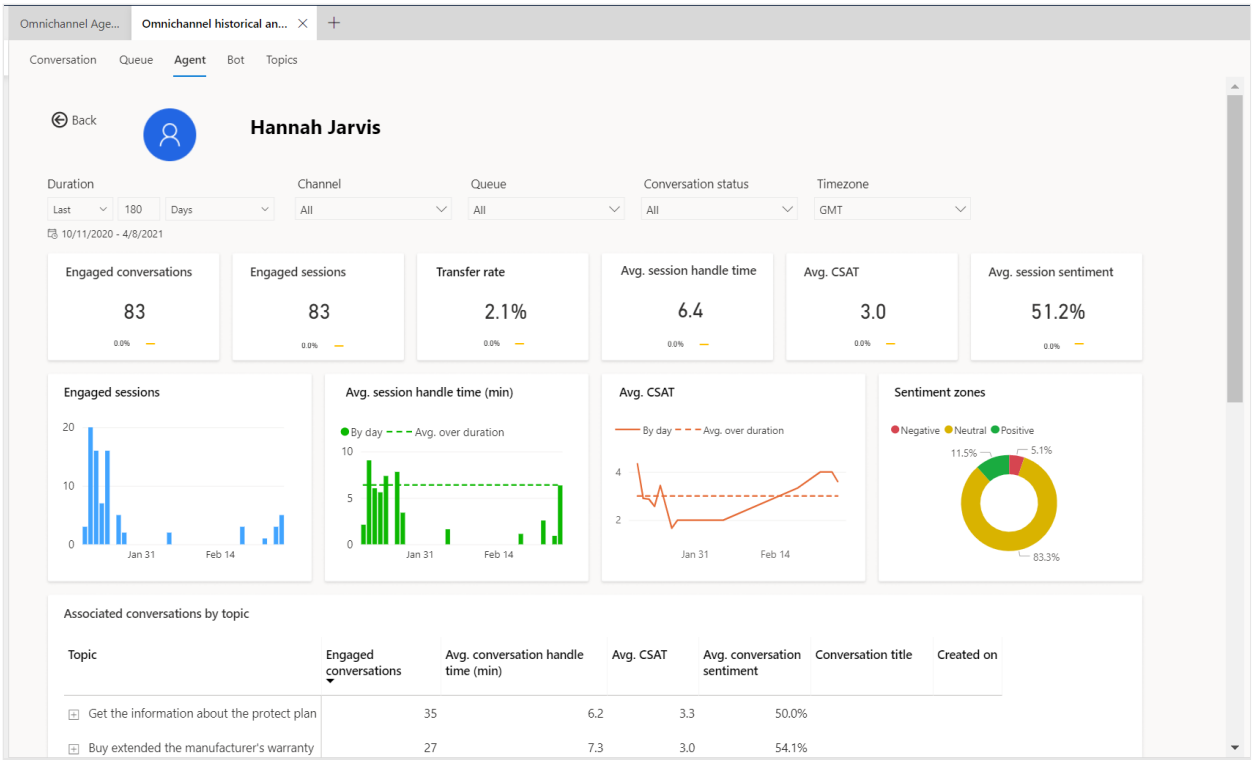
Consult/Monitor	Description
Consult sessions	The number of sessions where the agent has participated in consult mode.
Avg. consult time (min)	The average time an agent spent during a session in consult mode.
Monitor sessions	The number of sessions where the agent has participated in monitor mode.
Avg. monitor time (min)	The average time an agent spent on a session in monitoring mode.

Availability	Description
Agent total login time (hrs)	The time an agent is logged into Omnichannel for Customer Service.
Agent available duration (hrs)	The time an agent is in the available state in Omnichannel for Customer Service.
Agent busy duration (hrs)	The time an agent is in the busy state in Omnichannel for Customer Service.
Agent busy (DND) duration (hrs)	The time an agent is in the busy do not disturb (DND) state in Omnichannel for Customer Service.
Agent away duration (hrs)	The time an agent is in the away state in Omnichannel for Customer Service.
Agent offline duration (hrs)	The time an agent is signed out of Omnichannel for Customer Service.

Agent drill-down view

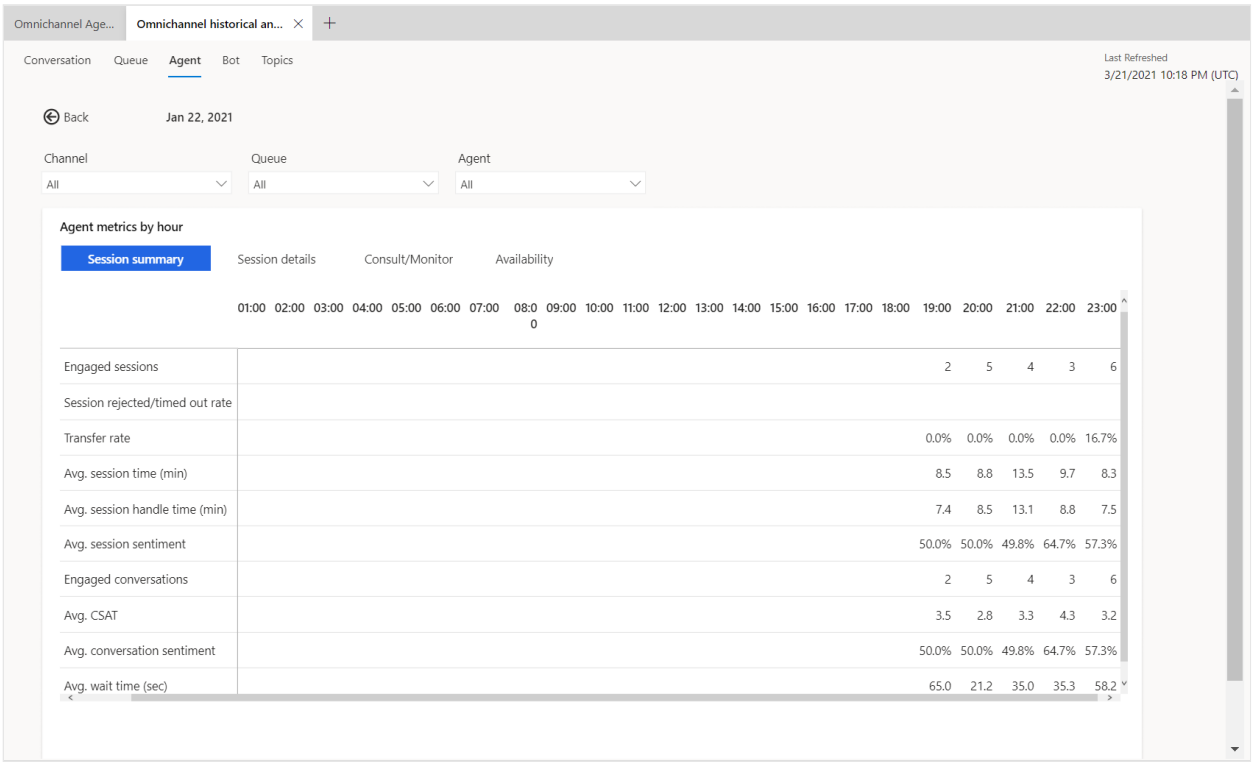
The Agent drill-down view provides supervisors with a holistic look into individual agent performance on metrics and can be valuable in training or coaching scenarios for agents.

To access the drill-down view, select any metric value for the agent you're interested in, and then select **Details**. Use the **Back** button to come back to the main view from a details view. The **Details** button and **Hourly** button are in disabled mode by default and get enabled only when a metric is selected.



Drill down view of agent hourly details

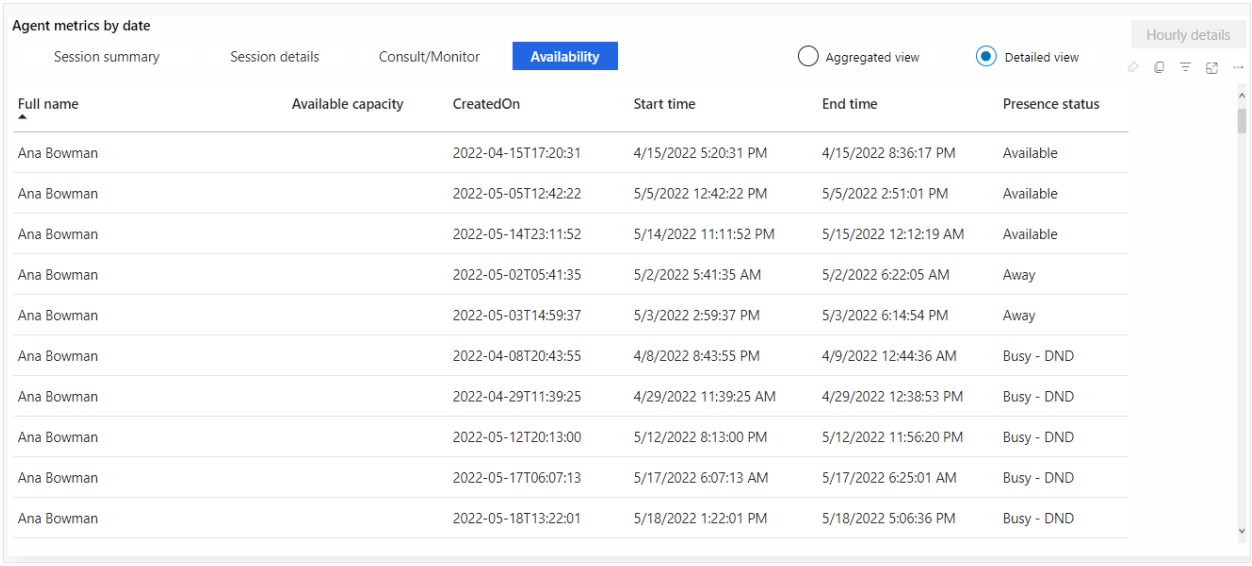
The Agent hourly details drill-down view provides granular insight into the hour-by-hour breakdown of key conversation metrics within the contact center. The metrics for Session summary, Session details, Consult/Monitor, and Availability are the same as in the day-by-day view, ensuring that supervisors can consistently analyze their contact center operation regardless of duration granularity. To view the drill-down view, select any single metric value on the required day, then select **Hourly details**.



Drill down view of agent presence statuses

The agent presence status drill-down view shows the start time and end time of all the presence statuses for agents during their work hours. This data helps you derive the duration of each presence status for the agent.

Select the **Availability** tab. In **Aggregated view**, the duration of the presence status is displayed for each hour. In **Detailed view**, the start and end times of the presence status are displayed for each agent, over a month.



Agent metrics by date

Session summary | Session details | Consult/Monitor | Availability | Aggregated view | Detailed view | Hourly details

Full name	Available capacity	CreatedOn	Start time	End time	Presence status
Ana Bowman		2022-04-15T17:20:31	4/15/2022 5:20:31 PM	4/15/2022 8:36:17 PM	Available
Ana Bowman		2022-05-05T12:42:22	5/5/2022 12:42:22 PM	5/5/2022 2:51:01 PM	Available
Ana Bowman		2022-05-14T23:11:52	5/14/2022 11:11:52 PM	5/15/2022 12:12:19 AM	Available
Ana Bowman		2022-05-02T05:41:35	5/2/2022 5:41:35 AM	5/2/2022 6:22:05 AM	Away
Ana Bowman		2022-05-03T14:59:37	5/3/2022 2:59:37 PM	5/3/2022 6:14:54 PM	Away
Ana Bowman		2022-04-08T20:43:55	4/8/2022 8:43:55 PM	4/9/2022 12:44:36 AM	Busy - DND
Ana Bowman		2022-04-29T11:39:25	4/29/2022 11:39:25 AM	4/29/2022 12:38:53 PM	Busy - DND
Ana Bowman		2022-05-12T20:13:00	5/12/2022 8:13:00 PM	5/12/2022 11:56:20 PM	Busy - DND
Ana Bowman		2022-05-17T06:07:13	5/17/2022 6:07:13 AM	5/17/2022 6:25:01 AM	Busy - DND
Ana Bowman		2022-05-18T13:22:01	5/18/2022 1:22:01 PM	5/18/2022 5:06:36 PM	Busy - DND

Drill down view of agent custom presence

The agent custom presence drill-down view provides insight into the out-of-the-box presence status metrics and custom presence metrics.

Select the **Availability** tab and then select **Aggregated view** to view the hourly details of the various statuses. The **Presence status** column shows metrics for both out-of-the-box and custom-state metrics. For example, on April 5, 2022, the specific agent spent 0.7h in the custom state of **Inactive** and 0.6h in the out-of-the-box status of **Busy - DND**.

Agent metrics by date

Session summary | Session details | Consult/Monitor | Availability | Aggregated view | Detailed view | Hourly details

Presence status	Mar 28, 2022	Mar 29, 2022	Mar 30, 2022	Apr 2, 2022	Apr 3, 2022	Apr 4, 2022	Apr 5, 2022	Apr 6, 2022	Apr 7, 2022	Apr 8, 2022	Apr 9, 2022	Apr 12, 2022	Apr 14, 2022
Available	0.7				1.7						1.6	1.1	
Available - LC/SMS		2.3		1.3		1.7			2.6		1.1		
Inactive				2.4		1.0	0.7			3.8			1.5
Busy - DND							0.6	2.9		4.9	3.9		
Offline			1.9	1.4								0.6	

See also

Conversation dashboard
Dashboard overview
Queue dashboard
Bot dashboard
Conversation Topics dashboard
Manage report bookmarks

Bot dashboard

Article • 10/12/2022

In Omnichannel for Customer Service, you can integrate both Azure and Power Virtual Agents bots to perform tasks like starting a conversation with the customer, providing automated responses, and then transferring the conversation to a human agent, as required. The bot dashboard shows key performance indicators (KPIs) and charts that you can use to understand how bots are performing in a support organization.

If your administrator has enabled **Add historical analytics for bots** in Customer Service admin center, then the dashboard displays the metrics, KPIs, and charts specific to the type of bots integrated with the application.

Access the Bot dashboard

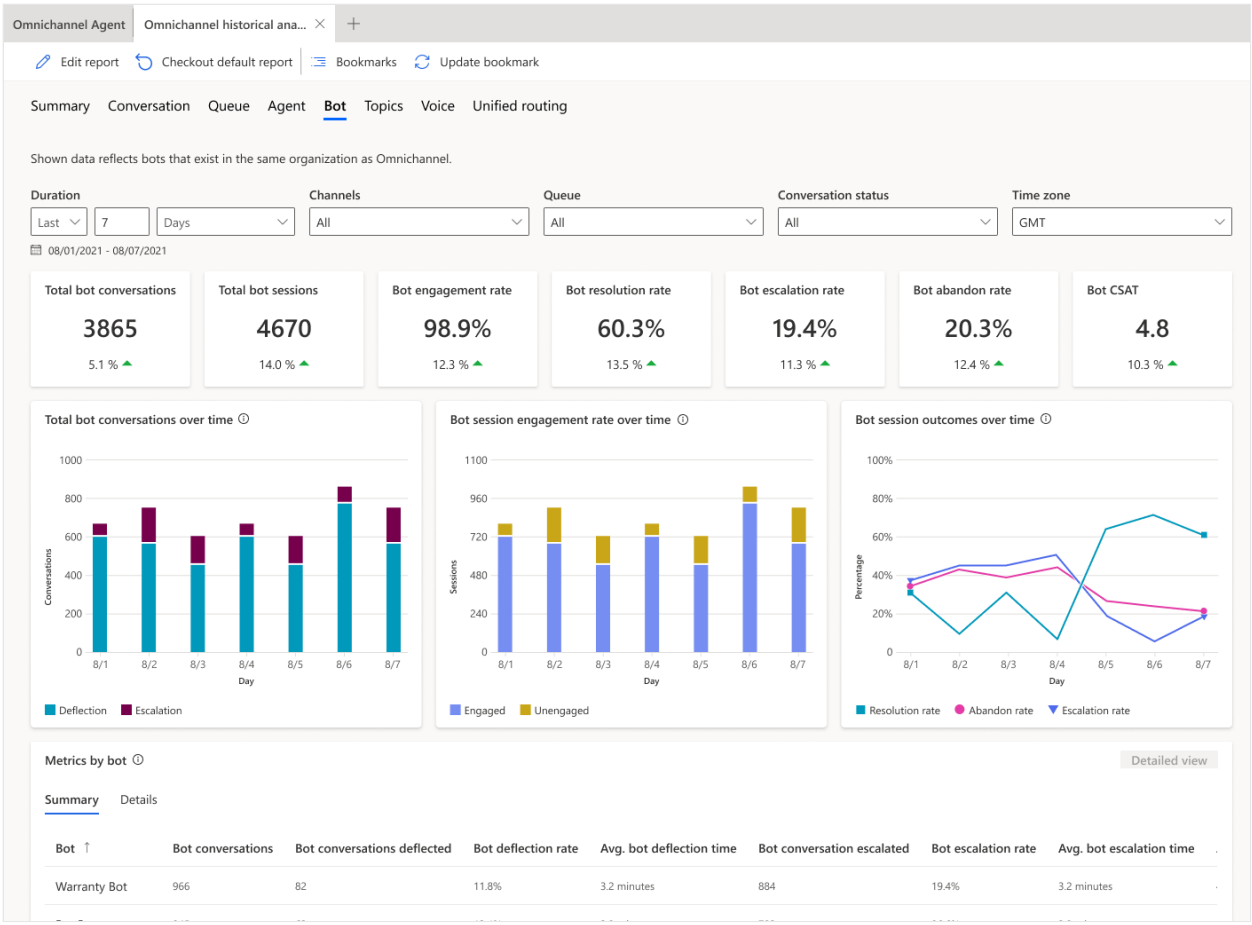
In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

On the page that appears, select the dashboard.

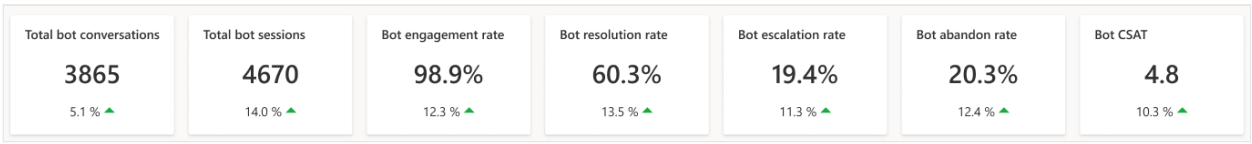
Power Virtual Agents bot dashboard

The bot dashboard displays metrics specific to Power Virtual Agents bots only if Power Virtual Agents bots are integrated with Omnichannel for Customer Service and the **Add historical analytics for bots** checkbox in Customer Service admin center is enabled.



Report details

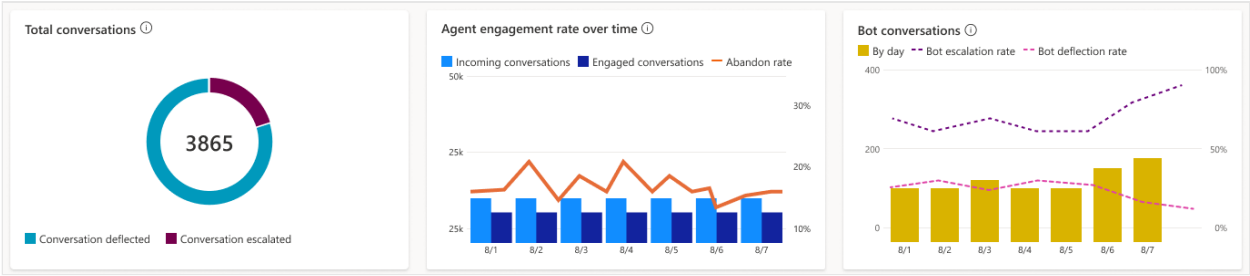
The report summarizes KPIs for the specified time period and the percentage change over that period. These metrics are specific to Power Virtual Agents bots. You can filter these areas by duration, channel, queue, or agent.



KPI	Description
Total bot conversations	The number of conversations initiated by the customer and engaged by a bot.
Bot escalation rate	The percentage of bot sessions that were escalated by a bot to a human agent.
Total bot sessions	The total number of sessions within the specified time period. A bot session is defined as a conversation in which a bot is invoked. The bot can be invoked at the beginning, during, or end of a conversation.

KPI	Description
Bot engagement rate	The percentage of total sessions that are engaged sessions. An engaged session is a session in which a user-created topic (as opposed to a system topic) is triggered, or the session ends in escalation. Engaged sessions can have one of three outcomes: they're either resolved, escalated, or abandoned.
Bot resolution rate	The percentage of sessions that were closed by interacting with a bot out of all the sessions engaged by a bot.
Bot abandon rate	The percentage of engaged sessions that are abandoned. An abandoned session is an engaged session that isn't resolved or escalated after one hour from the beginning of the session.
Bot CSAT	The graphical view of the average of customer satisfaction (CSAT) scores for sessions in which customers respond to an end-of-session request to take the survey.

The following table shows the bot KPI chart metrics.



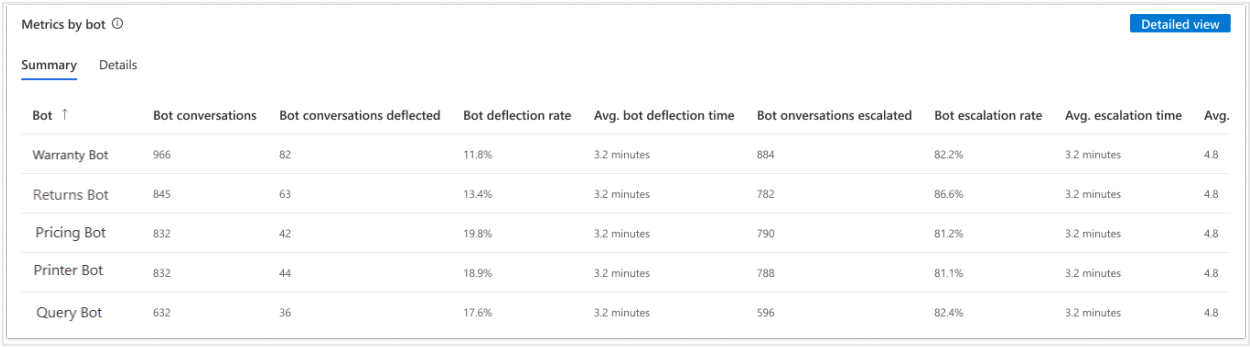
Title	Description
Total conversations	A graphical view of the total number of bot conversations with the number of escalated and deflected conversations over time.
Engagement over time	A graphical view of the number of engaged and unengaged sessions over time. An engaged session is a session in which a user-created topic is triggered or the session ends in escalation.
Session outcomes over time	A graphical view of the daily resolution rate, escalation rate, and abandon rate over the specified time period.

Metrics by bot

The **Metrics by bot** section displays a comprehensive set of analytics that show you the key performance indicators. You can also view the trends and usage for your bot's topics at a granular level, highlighting the topics that have the greatest impact on your bot's performance.

Summary

The **Summary** tab gives you a broad overview of your bot's performance.



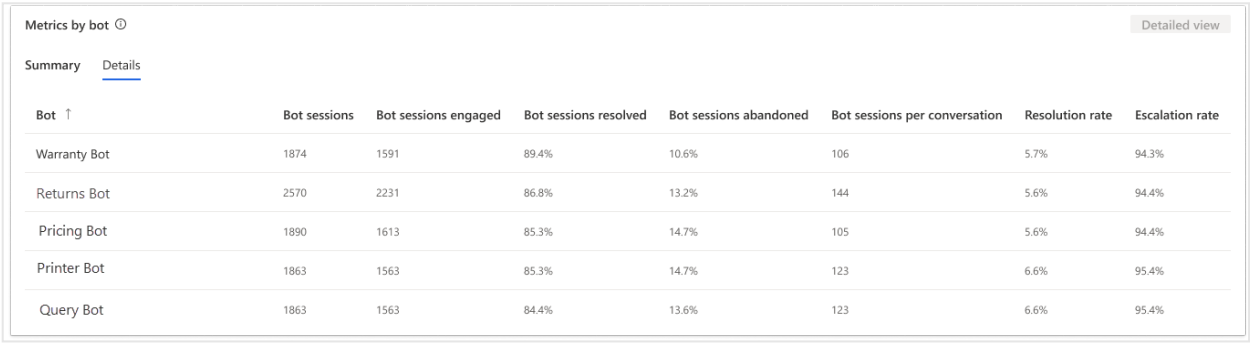
Bot	Bot conversations	Bot conversations deflected	Bot deflection rate	Avg. bot deflection time	Bot onversations escalated	Bot escalation rate	Avg. escalation time	Avg.
Warranty Bot	966	82	11.8%	3.2 minutes	884	82.2%	3.2 minutes	4.8
Returns Bot	845	63	13.4%	3.2 minutes	782	86.6%	3.2 minutes	4.8
Pricing Bot	832	42	19.8%	3.2 minutes	790	81.2%	3.2 minutes	4.8
Printer Bot	832	44	18.9%	3.2 minutes	788	81.1%	3.2 minutes	4.8
Query Bot	632	36	17.6%	3.2 minutes	596	82.4%	3.2 minutes	4.8

KPIs for the following areas are displayed.

Title	Description
Bot conversations	The number of conversations initiated by the customer and engaged by a bot.
Bot resolution rate	The percentage of conversations that were closed by interacting with a bot, out of all conversations engaged by a bot.
Bot resolution time	The length of time, in minutes, for which a customer interacted with a bot before the conversation was closed.
Bot escalation rate	The percentage of conversations that were escalated by a bot to a human agent.
Bot escalation time (min)	The length of time, in minutes, during which a customer interacted with a bot before the conversation was escalated to a human agent.

Details

The **Details** tab gives you an insight into the bot sessions.



Bot	Bot sessions	Bot sessions engaged	Bot sessions resolved	Bot sessions abandoned	Bot sessions per conversation	Resolution rate	Escalation rate
Warranty Bot	1874	1591	89.4%	10.6%	106	5.7%	94.3%
Returns Bot	2570	2231	86.8%	13.2%	144	5.6%	94.4%
Pricing Bot	1890	1613	85.3%	14.7%	105	5.6%	94.4%
Printer Bot	1863	1563	85.3%	14.7%	123	6.6%	95.4%
Query Bot	1863	1563	84.4%	13.6%	123	6.6%	95.4%

KPIs for the following areas are displayed.

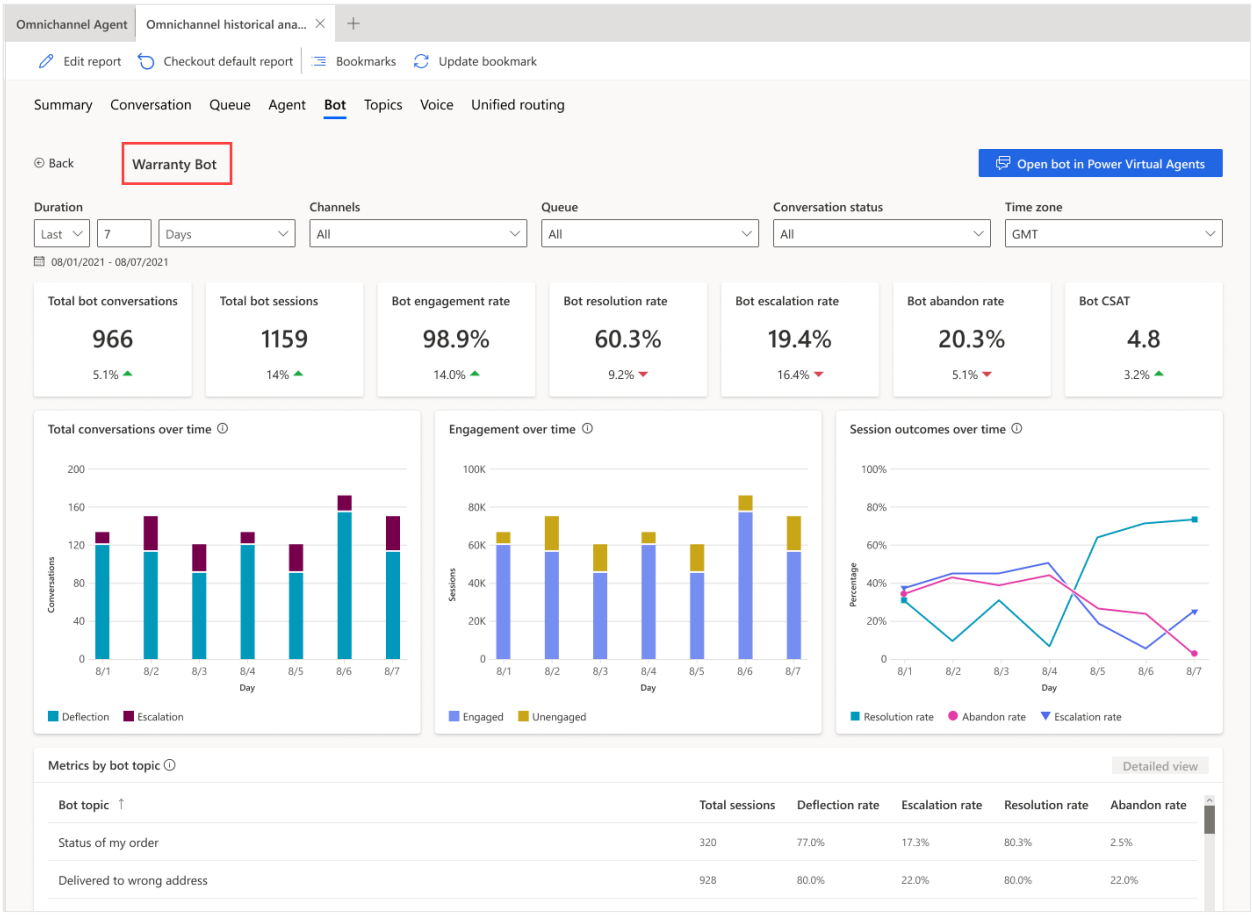
Title	Description
Total sessions	The total number of sessions within the specified time period.
Bot sessions engaged	The number of sessions the bot is engaged in within the specified time period.
Bot sessions resolved	The number of engaged sessions that are resolved by the bot.
Bot sessions abandoned	The number of engaged sessions that are abandoned. An abandoned session is an engaged session that is not resolved or escalated after one hour from the beginning of the session.
Bot sessions per conversation	The average number of Power Virtual Agents bot sessions per conversation.
Session resolved rate	The percentage of total sessions that were resolved by the bot within the specified time period.
Sessions escalated rate	The percentage of total sessions that were escalated by the bot to a human agent within the specified time period.

Bot drill-down view

In the **Metrics by bot** section, you can select a Power Virtual Agents bot to view the individual bot's performance on the bot drill-down view. Bot topics and their corresponding metrics are also displayed, giving supervisors further insights into individual topic performance.

To access the drill-down view, select the bot that you're interested in, and then select **Detailed view**.

The application displays the key performance metrics and charts for the individual bot.



Title	Description
Total conversations	The number of conversations initiated by the customer and engaged by the bot.
Total sessions	The total number of sessions within the specified time period. A bot session is defined as a conversation in which a bot is invoked. The bot can be invoked at the beginning, during, or end of a conversation.
Engagement rate	The percentage of total sessions that are engaged by the bot. An engaged session is a session in which a user-created topic (as opposed to a system topic) is triggered, or the session ends in escalation. Engaged sessions can have one of three outcomes—they're either resolved, escalated, or abandoned.
Resolution rate	The percentage of engaged sessions that are resolved. A resolved session is an engaged session in which the user receives an end-of-conversation survey that asks the question "Did that answer your question?" and the user either doesn't respond or responds **Yes**.
Escalation rate	The percentage of engaged sessions that are escalated by the bot. An escalated session is an engaged session that is escalated to a human agent.
Abandon rate	The percentage of engaged sessions that are abandoned. An abandoned session is an engaged session that isn't resolved or escalated after one hour from the beginning of the session.

Title	Description
Bot CSAT	The average of customer satisfaction (CSAT) scores for sessions in which customers respond to an end-of-session request to take the survey.

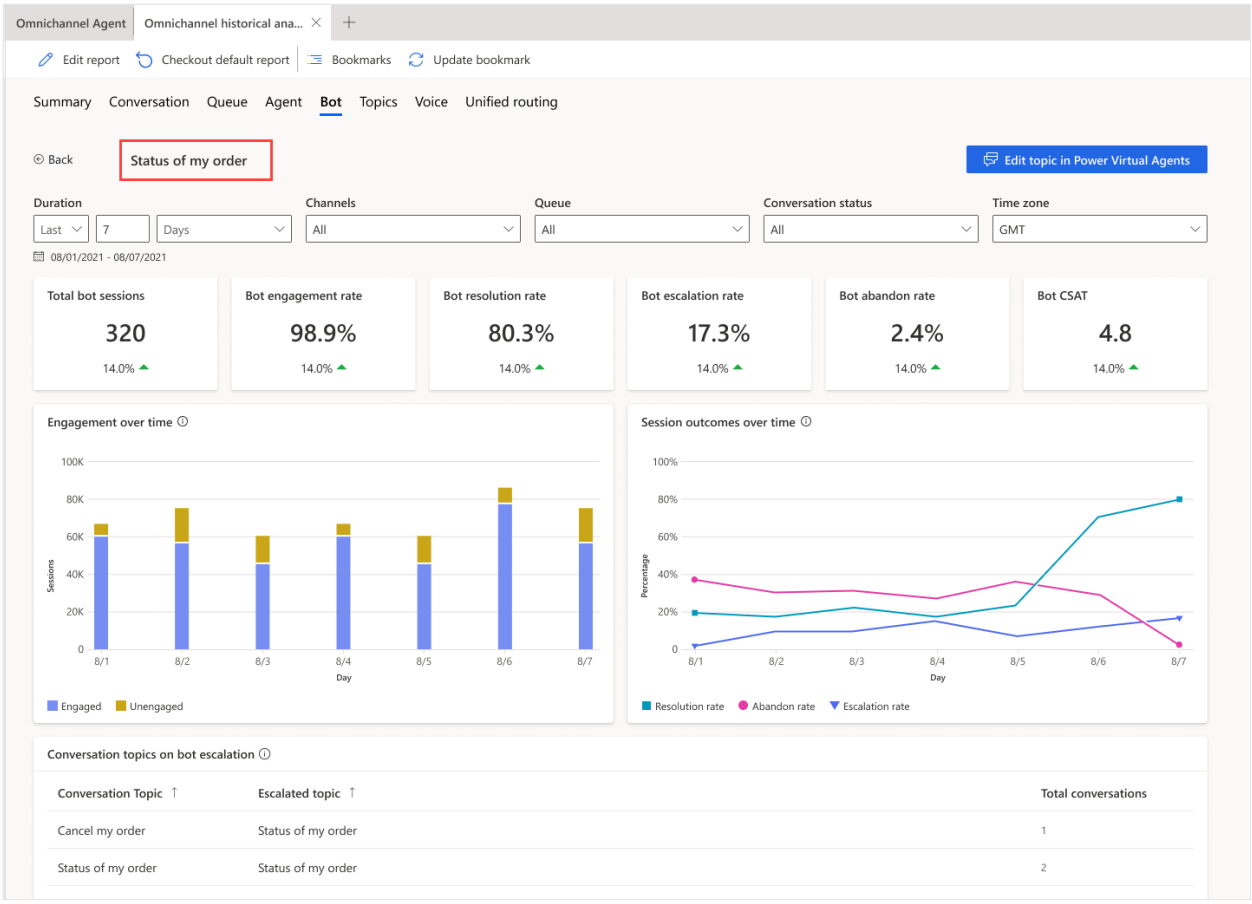
The following charts are displayed:

Title	Description
Total conversations over time	The number of conversations initiated by the customer and engaged by the bot that were either escalated or deflected.
Engagement over time	Provides a graphical view of the number of engaged and unengaged sessions over time. An engaged session is a session in which a user-created topic is triggered or the session ends in escalation.
Session outcomes over time	Provides a graphical view of the daily resolution rate, escalation rate, and abandon rate over the specified time period.

Metrics by bot topic

The **Metrics by bot topic** section provides insights into the performance of individual bot topics and their key business metrics. The metrics give the supervisor an overview of which topics the bot was able to deflect or escalate.

You can also select a topic and drill down into the individual topic performance and metrics. The topic-level metrics help supervisors further analyze how the bot is handling the topic.

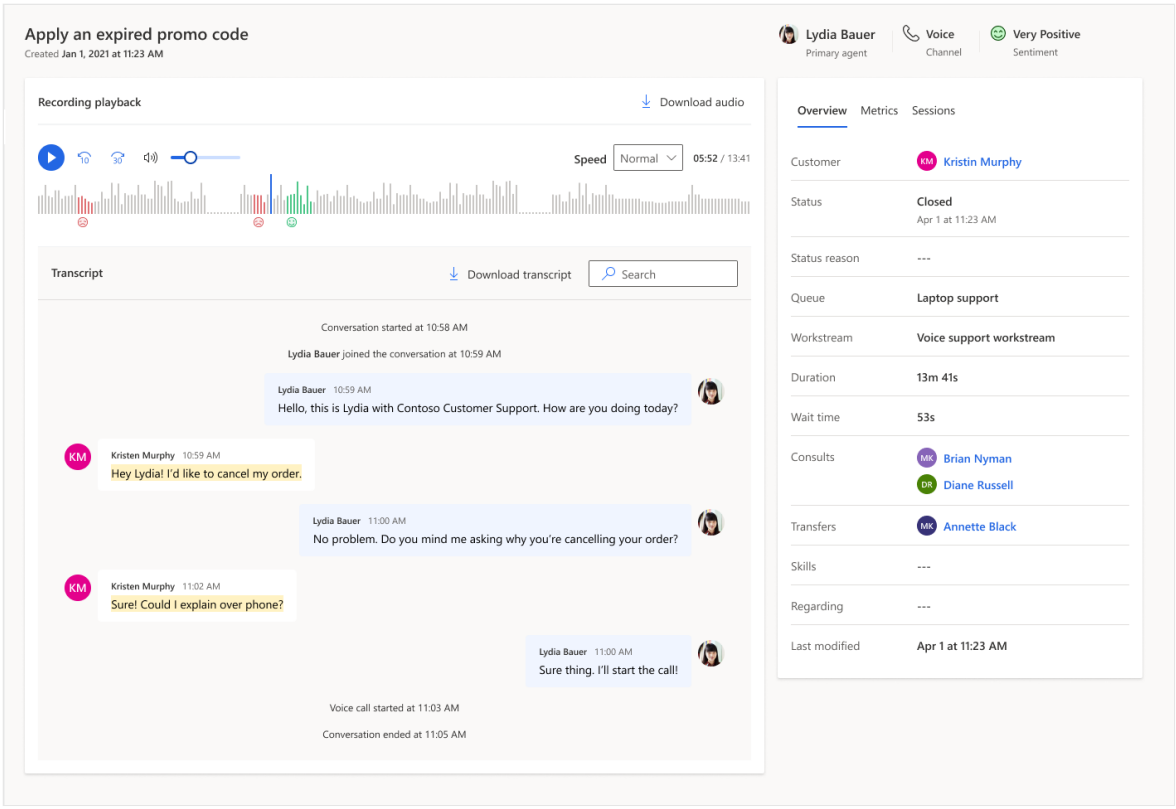


The **Bot conversation metrics** section provides the topic transcripts, allowing supervisors to go through the bot's interactions for the topic and take corrective measures.

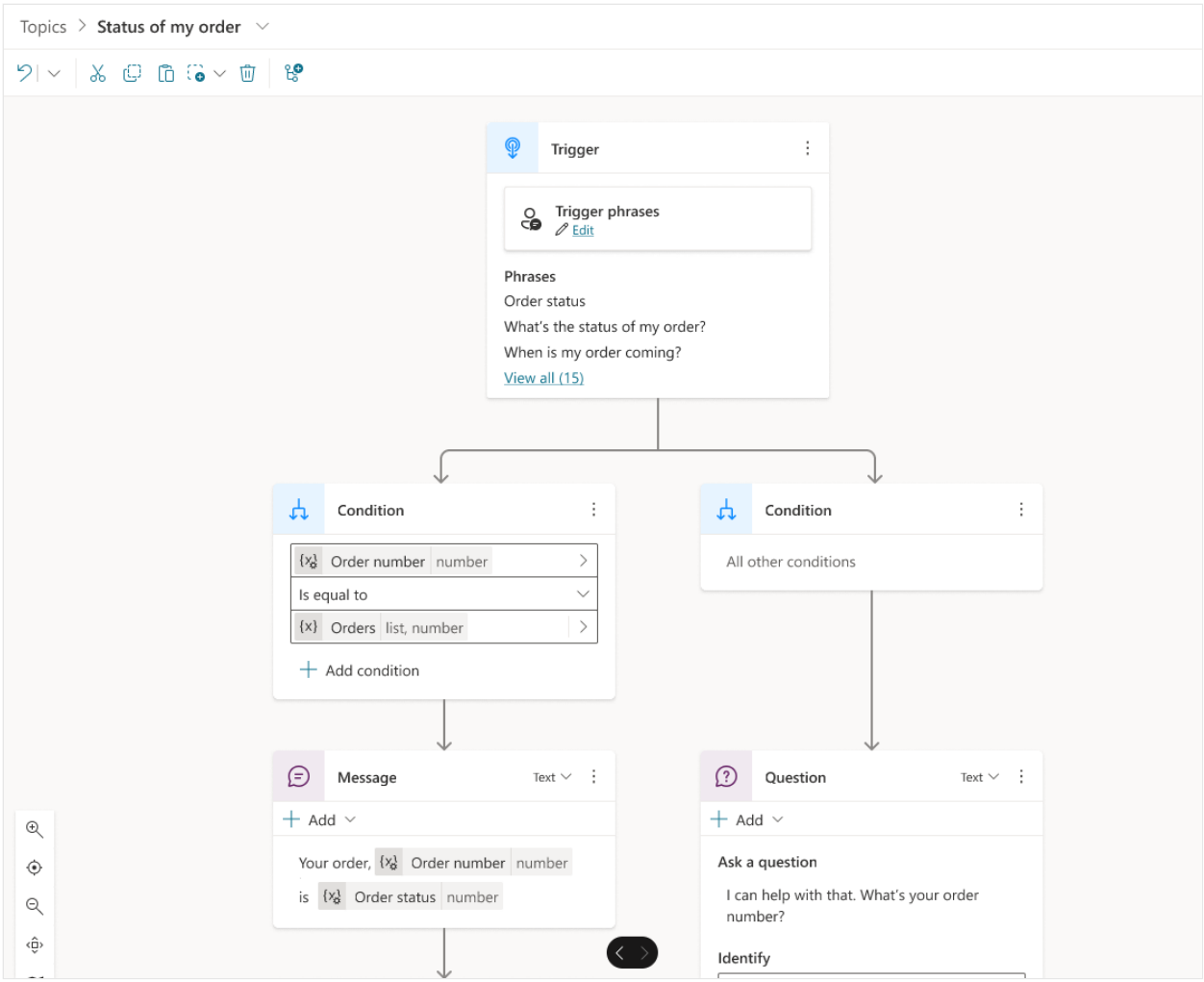
View and improve bot topics

You can view and improve the performance of individual topics associated with a Power Virtual Agents bot by performing the following steps:

1. On the bot drill-down page, for a bot, select the topic to view the topic-specific metrics. You can also view and download up to seven days of bot conversation transcript sessions from the past 30 days.

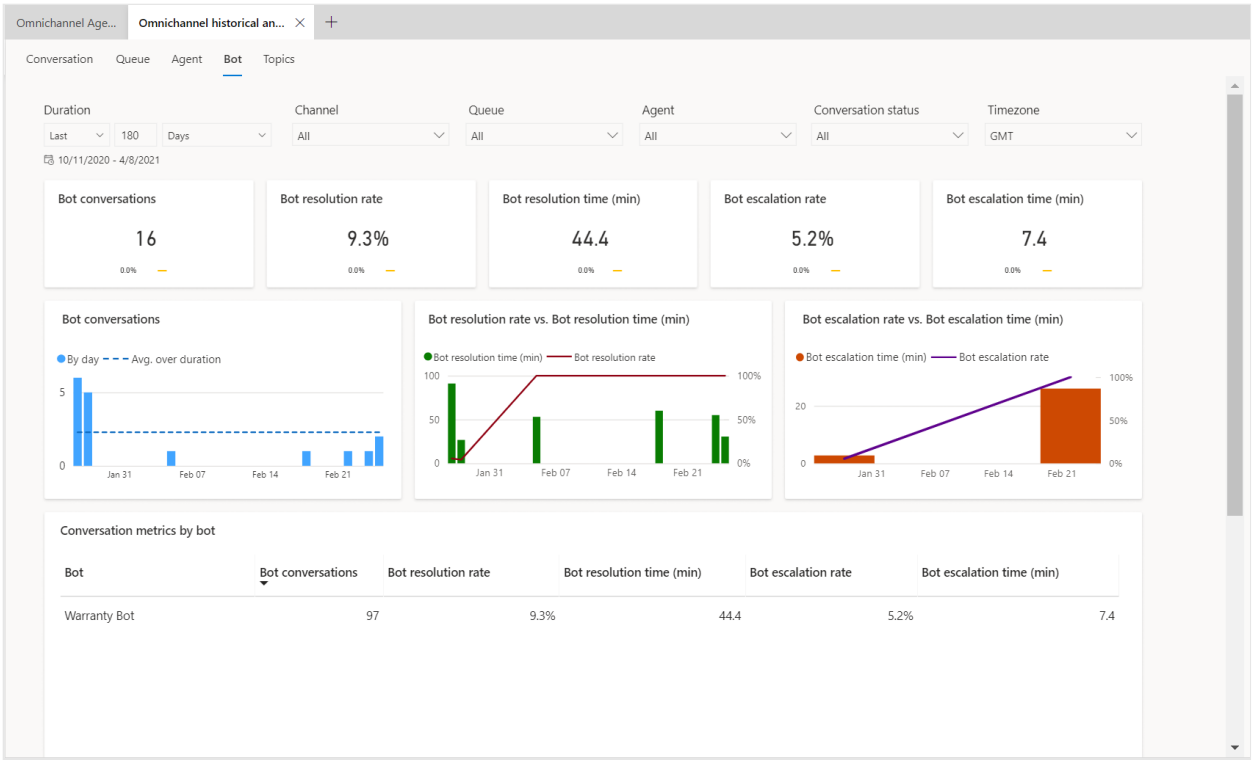


2. To edit the bot responses to a topic, select **Edit Power Virtual Agents** on the Topics metrics grid. This opens the corresponding Power Virtual Agents bot. You can modify both the topic name and trigger phrases, and for trigger phrases, you can add more.



Dashboard for all bots

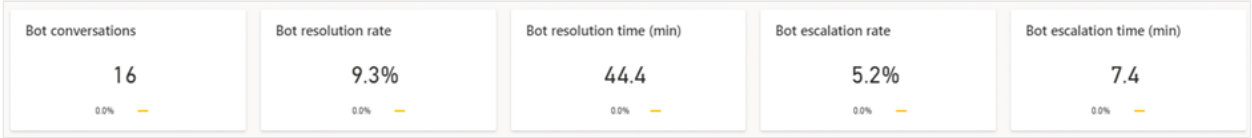
The **bot** dashboard summarizes the KPIs for all the bots integrated with Omnichannel for Customer Service for the specified time period and percent change over a period. The application displays this view only if your administrator has disabled the **Add historical analytics for bots** checkbox in Customer Service admin center. You can filter these areas by duration, channel, queue, or agent.



Report details

KPIs for the following areas are displayed.

KPI	Description
Bot conversations	The number of conversations initiated by the customer and engaged by a bot.
Bot resolution rate	The percentage of conversations that were closed by interacting with a bot out of all conversations engaged by a bot.
Bot resolution time (min)	The time in minutes for which a customer interacted with a bot before the conversation was closed.
Bot escalation rate	The percentage of conversations that were escalated by a bot to a human agent.
Bot escalation time (min)	The time in minutes for which a customer interacted with a bot before the conversation was escalated to a human agent.



The following table explains the bot KPI chart metrics.

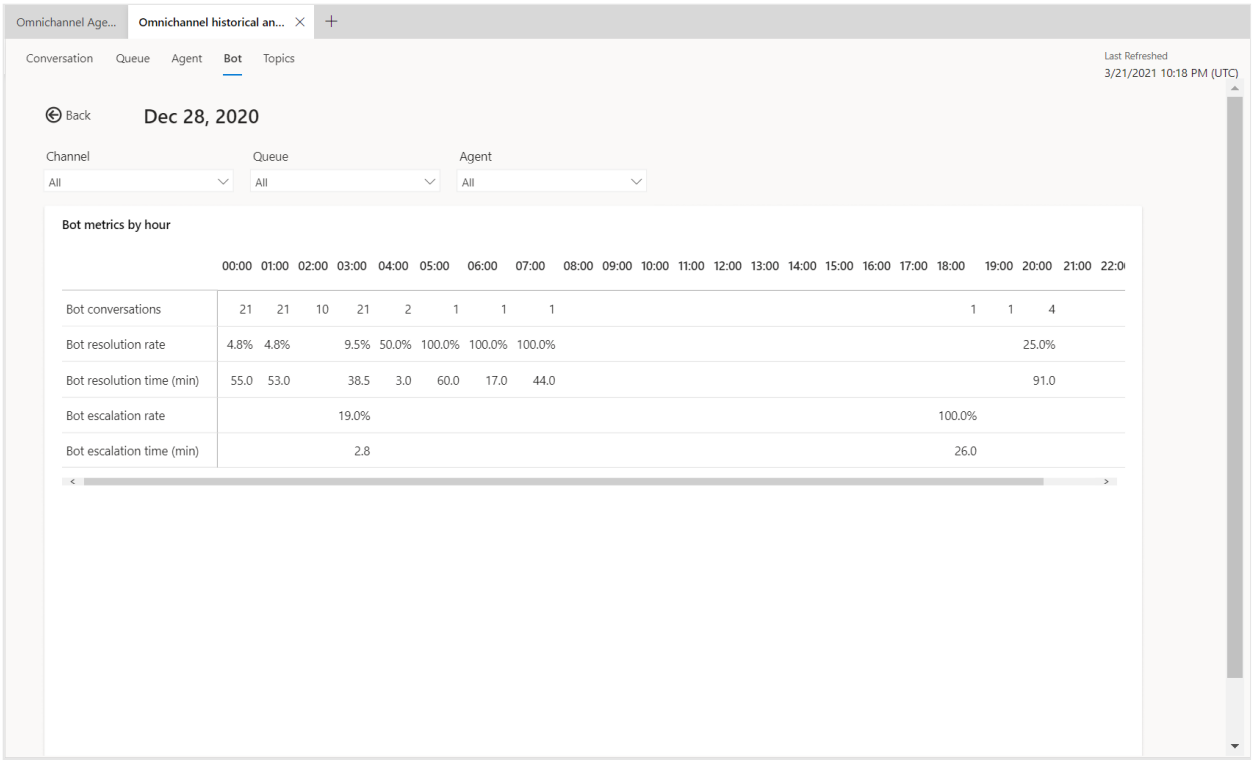
Title	Description

Title	Description
Bot conversations	The total number of bot conversations occurring per day.
Bot resolution rate versus Bot resolution time (min)	The number of customer issues resolved by a bot versus the amount of time it took to resolve them.
Bot escalation rate versus Bot escalation time (min)	The number of customer sessions escalated by a bot to human agent versus the amount of time the bot was engaging before escalation.

Title	Description
Bot conversations	The number of conversations initiated by the customer and engaged by a bot.
Bot resolution rate	The percentage of conversations that were closed by interacting with a bot out of all conversations engaged by a bot.
Bot resolution time	The time in minutes for which a customer interacted with a bot before the conversation was closed.
Bot escalation rate	The percentage of conversations that were escalated by a bot to a human agent.
Bot escalation time (min)	The time in minutes for which a customer interacted with a bot before the conversation was escalated to a human agent.

Bot hourly detail drill-down view

The **Bot metrics by hour** drill-down view provides more granular insight into the hour-by-hour breakdown of key conversation metrics within the contact center. The metrics are the same as the day-by-day view ensuring that supervisors can consistently analyze their contact center operation regardless of desired duration granularity. To view the bot metrics by hour in the drill-down view, select any single metric value on the desired day, then select **Hourly details**.



See also

Conversation dashboard

Dashboard overview

Queue dashboard

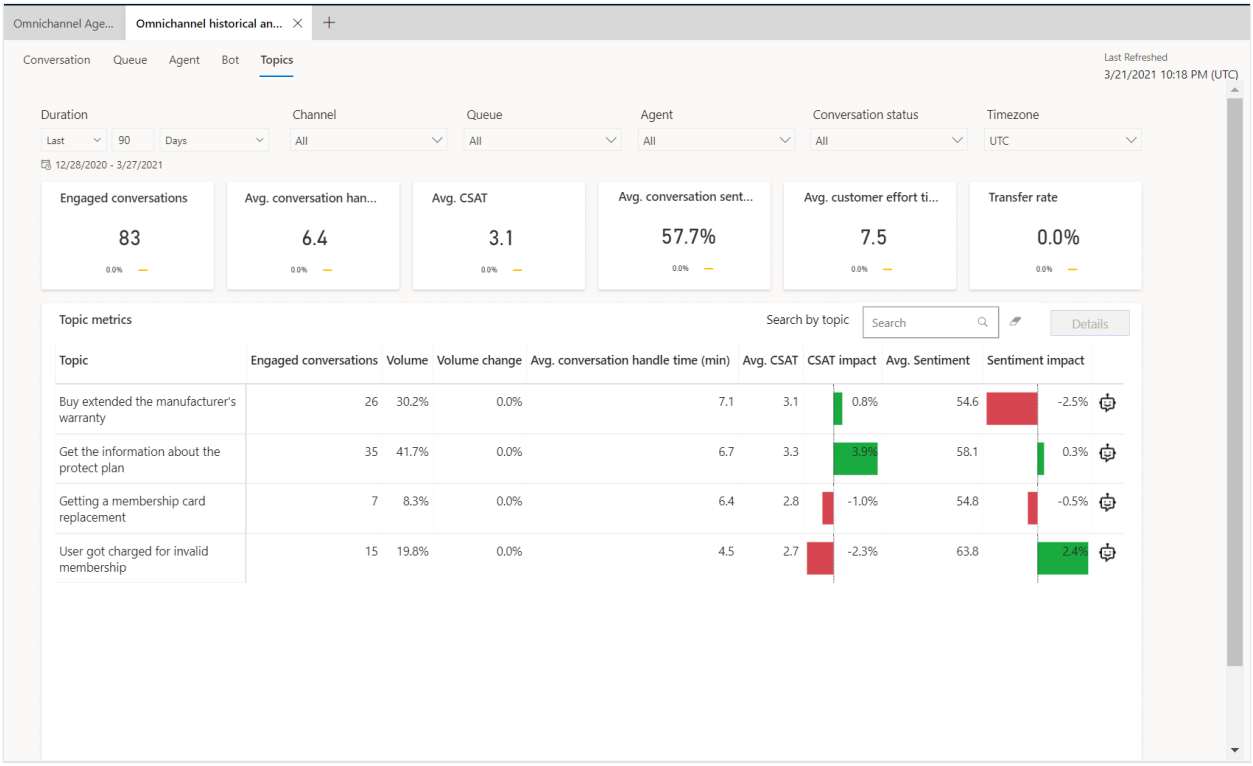
Conversation Topics dashboard

Manage report bookmarks

Conversation Topics dashboard

Article • 01/27/2023

The Topics dashboard shows a detailed breakdown of conversations and their assigned topics. Customer Service Insights uses AI-generated topics and natural language understanding to automatically group your conversations to help you better understand how different topic areas are impacting your organization's support performance.



Access the Topics dashboard

In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

On the page that appears, select the dashboard.

Report Details

The key performance indicator summary charts summarize the KPIs for the specified time and the percent change over the period. You can filter these areas by duration,

channel, queue, agent, conversation status, and time zone.

KPIs for the following areas are displayed:

KPI	Description
Engaged conversations	Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point.
Avg. conversation handle time (min)	The average total conversation active time across engaged conversations.
Avg. CSAT	The average CSAT score provided by customers from Dynamics 365 Customer Voice survey responses.
Avg. conversation sentiment	The average predicted sentiment of the customer across engaged conversations.
Avg. customer effort time (min)	The average time from the start of conversation to the start of the conversation wrap-up time.
Transfer rate	The number of sessions transferred by an agent.

The topics metrics chart displays the following metrics.

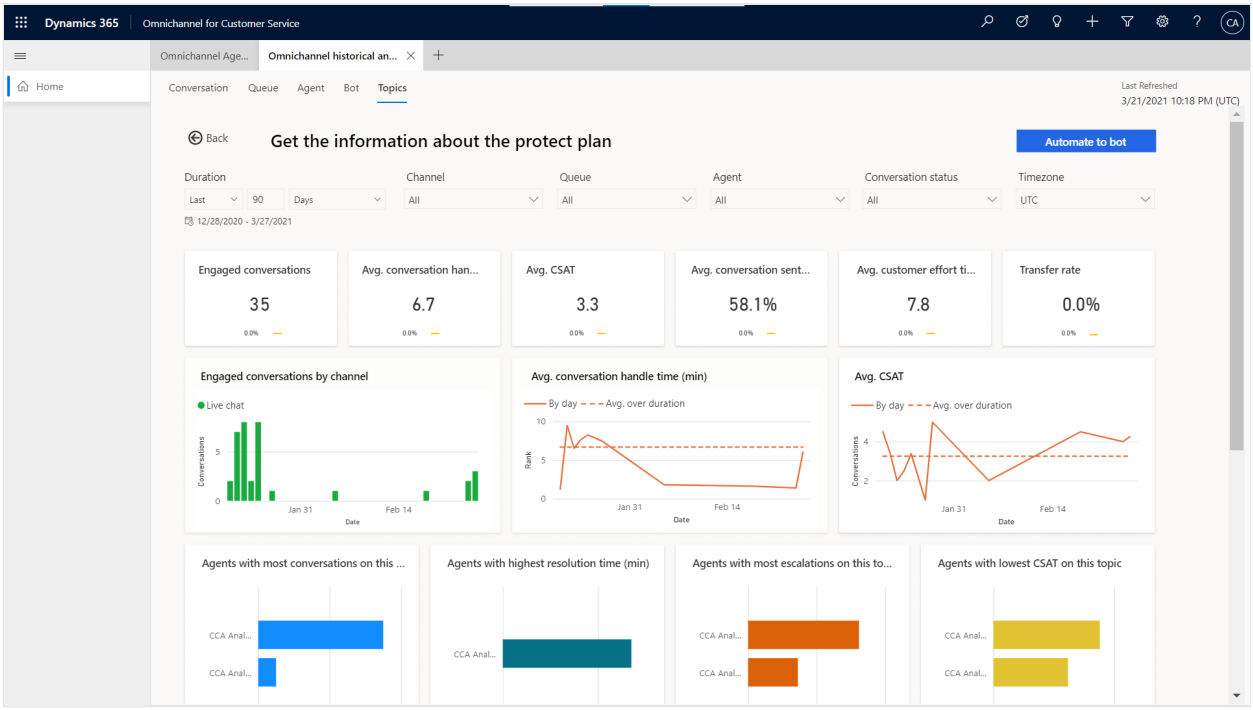
KPI	Description
Engaged conversations	Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point.
Volume	The total conversation volume from customers.
Volume change	The change in conversation volume from customers over the specified duration.
Avg. conversation handle time (min)	The average total conversation active time across engaged conversations.
Avg. CSAT	The average CSAT score provided by customers from Customer Voice survey responses. This is only available if Dynamics 365 Customer Voice has been configured as a post-conversation survey tool.
CSAT impact	The impact (downward or upward) that the conversations in the selected topic group are driving the overall organization CSAT.
Avg. sentiment	The average of customer sentiment based on verbatim provided in survey responses. Only available if Customer Voice has been configured as a post conversation survey tool.

KPI	Description
Sentiment impact	The impact (downward or upward) that the conversations in the selected topic group are driving the overall organization sentiment.
Power Virtual Agents icon	Supervisors can use this icon to select the topic for automation to Power Virtual Agents.

Conversation Topics drill-down view

The Topics drill-down view provides supervisors with a holistic look into individual topics in reference to key business metrics, and can be valuable in understanding why customers are contacting support.

To access the drill-down, select any metric value for the topic you're interested in, and then select **Details**.



Topic automation to Power Virtual Agents

AI-discovered topics in Omnichannel Historical Analytics are often prime candidates as topics for automation in Power Virtual Agents bots. If Power Virtual Agents is available in the region that your Customer Service organization is in, the feature can be enabled by your organization's administrator.

After a topic is identified as a good automation candidate, the automation workflow can be triggered by selecting Power Virtual Agents on the **Topics** metrics grid or by selecting

Details and then **Automate to Bot** in the drill -down view. This will open the topic editing form.

Suggested trigger phrases and the topics related to the case title are provided. The first step is to select the Power Virtual Agents bot that's ideal for adding the topic to. If no bot exists, select **Create Bot**. You'll be redirected to the Power Virtual Agents application for bot creation. You can modify both the topic name and trigger phrases, and in the case of trigger phrases; you can add additional ones. After this step is complete, select **Automate Continue** . The Power Virtual Agents topic will redirect to Power Virtual Agents for completion of authoring.

> ⓘ **Note**
>
> Bots created through the Microsoft Teams channel won't be listed in the bot selection list.

Language availability for topics

The topics capability in the Customer Service historical analytics reports comes with a natural language understanding model that can understand the text semantics and intent in the following languages:

- English
- French
- German
- Italian
- Japanese
- Portuguese
- Simplified Chinese
- Spanish

> ⓘ **Note**
>
> While topic discovery is not prevented and still possible in languages that are not listed above, there may be differences in experience for users who leverage topics in unsupported languages.

See Also

Conversation dashboard
Dashboard overview
Agent dashboard
Bot dashboard
Manage report bookmarks
Tracked keywords in Dynamics 365 Sales

Voicemail dashboard

Article • 02/02/2023

The Voicemail dashboard provides a view of the voicemails with details, such as the voicemail status and the number of voicemails per queue and agent.

Access the Voicemail dashboard

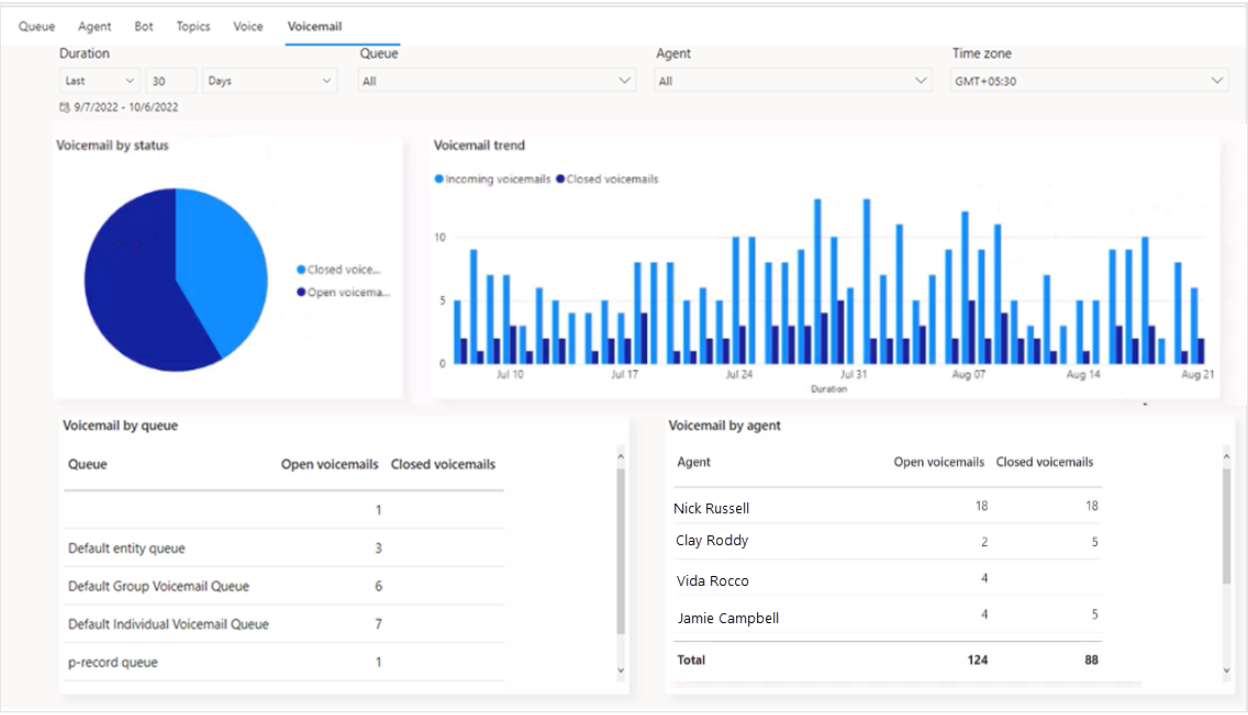
In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

On the page that appears, select the dashboard.

Report details

The reports summarize the KPIs for the specified time and percentage change over a period of time. You can filter these areas by duration, queue, agent, and time zone. The charts display the following metrics.



KPI	Description

KPI	Description
Voicemail by status	The number of voicemails that were initiated by the customer with the status open or close.
Voicemail trend	The number of incoming and closed voicemails per day, for the specified duration.
Voicemail by queue	The number of voicemails by queue.
Voicemail by agent	The number of voicemails assigned to an agent.

See also

Conversation dashboard
Dashboard overview
Queue dashboard
Bot dashboard
Conversation Topics dashboard
Manage report bookmarks

Historical analytics for unified routing in Omnichannel for Customer Service

Article • 10/12/2022

With the introduction of unified routing, an advanced and elaborate set of capabilities are available for organizations to enhance their routing configurations. Supervisors and business administrators need metrics to track how these advanced routing capabilities are helping their businesses serve their customers.

Access the Unified routing dashboard

In the Customer Service workspace or Omnichannel for Customer Service app, do one of the following to view the dashboard:

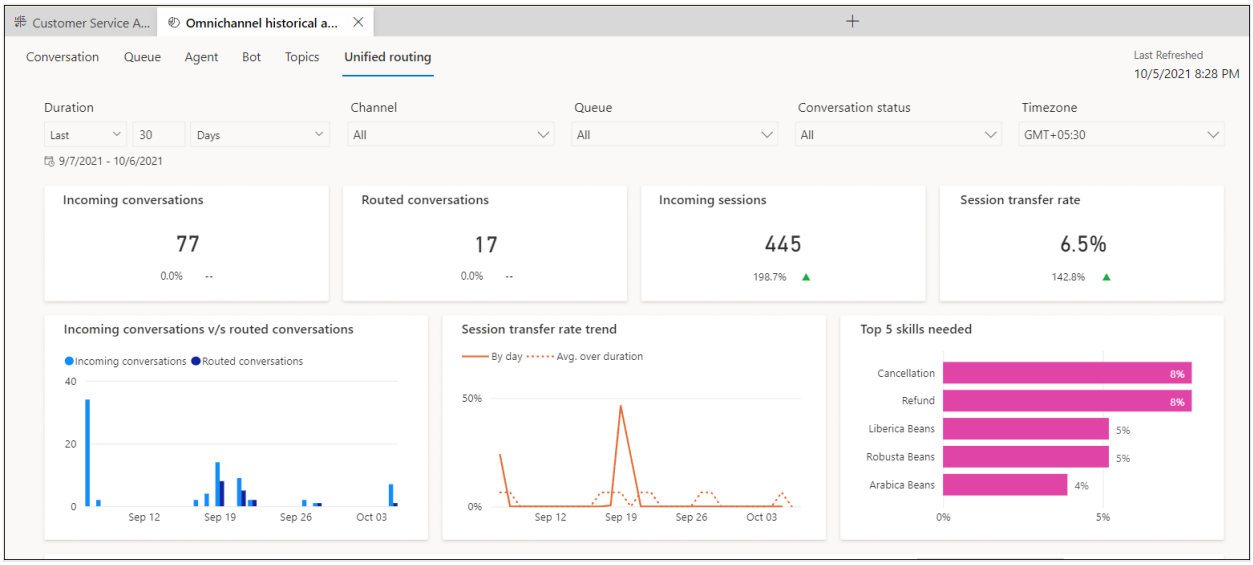
- In the default view, select the plus (+) icon, and then select **Omnichannel historical analytics**.
- If the enhanced multisession workspace view is enabled, select the site map and then select **Omnichannel historical analytics**.

On the page that appears, select the dashboard.

Unified routing report in Omnichannel historical analytics

The Unified routing report provides routing-specific KPIs and metrics that can be used by supervisors and administrators to track the success of their routing strategy. They can also track the incorrectly routed work items and configurations and correct them to improve the routing effectiveness and thereby customer satisfaction.

The report appears as a tab in the Omnichannel historical analytics report if your administrator has enabled the corresponding setting on the **Insights** page in Omnichannel admin center.



The report can be filtered on the following:

- **Duration**: Filters the data by the selected value of day, week, or month.
- **Channel**: Filters the data for the selected channel.
- **Queue**: Filters the data for the selected queue.
- **Conversation status**: Filters the data for the selected status.
- **Time zone**: Filters the data for the selected time zone.

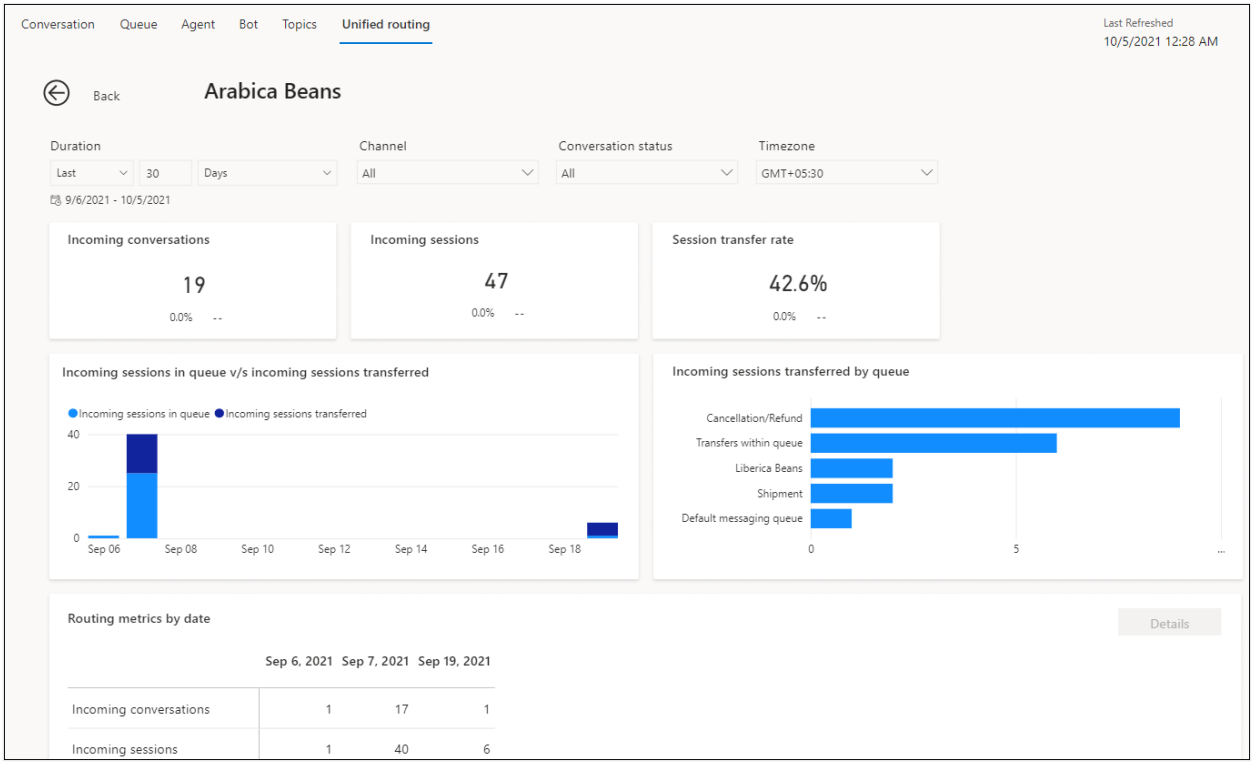
The unified routing report displays the following metrics for the selected filters. The percentage value for each KPI denotes the comparative data with the previous period.

Metric	Description	Derivation
Incoming conversations	The number of conversations initiated by the customer that can be presented to a human agent.	All conversations, except bot conversations, are considered.
Routed conversations	The total number of incoming conversations that have been routed successfully. **Note:** A conversation routed to a fallback queue is not considered in the calculation of the metric.	
Incoming sessions	The total number of sessions that were created.	
Session transfer rate	The percentage of incoming sessions that were transferred to another agent or queue.	
Incoming conversations v/s routed conversations	The number of conversations initiated by the customer versus the number of conversations that were routed successfully.	

Metric	Description	Derivation
Session transfer rate trend	The day wise trend of session transfer rate.	
Top 5 Skills demanded	The top five skills required by the incoming conversations.	

Queue drill-down view

On the **Unified routing** report page, in the **Routing metrics by queue** table, select a queue, and then select **Details** to view the detailed KPIs for it. You can view data on incoming conversations, incoming sessions, and session transfer rate for the queue.

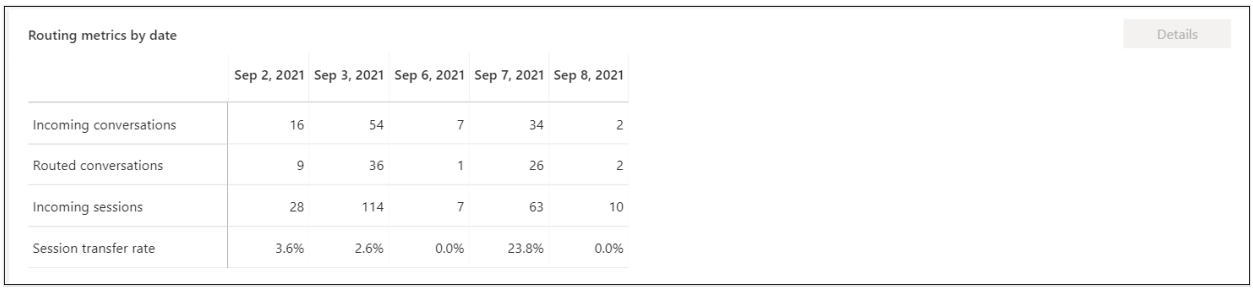


The queue drill-down view displays the following KPIs.

Metric	Description
Incoming sessions in queue vs incoming sessions transferred	The day-wise view of incoming sessions in the selected queue that are still in the queue versus sessions that have been transferred to other queues.
Incoming session transferred by queue	The queues to which sessions from the selected queue have been transferred.

Hourly drill-down view

On the **Unified routing** report page, the **Routing metrics by date** table displays the day wise data for the KPIs for the selected period in the **Duration** filter.


Routing metrics by date

Details

	Sep 2, 2021	Sep 3, 2021	Sep 6, 2021	Sep 7, 2021	Sep 8, 2021
Incoming conversations	16	54	7	34	2
Routed conversations	9	36	1	26	2
Incoming sessions	28	114	7	63	10
Session transfer rate	3.6%	2.6%	0.0%	23.8%	0.0%

You can select a date, and then select **Details** to view the routing metrics by the hour.

See also

Enable Historical analytics for unified routing in Omnichannel for Customer Service
Overview of unified routing
Diagnostics for unified routing
Manage report bookmarks

Introduction to knowledge analytics

Article • 10/03/2022

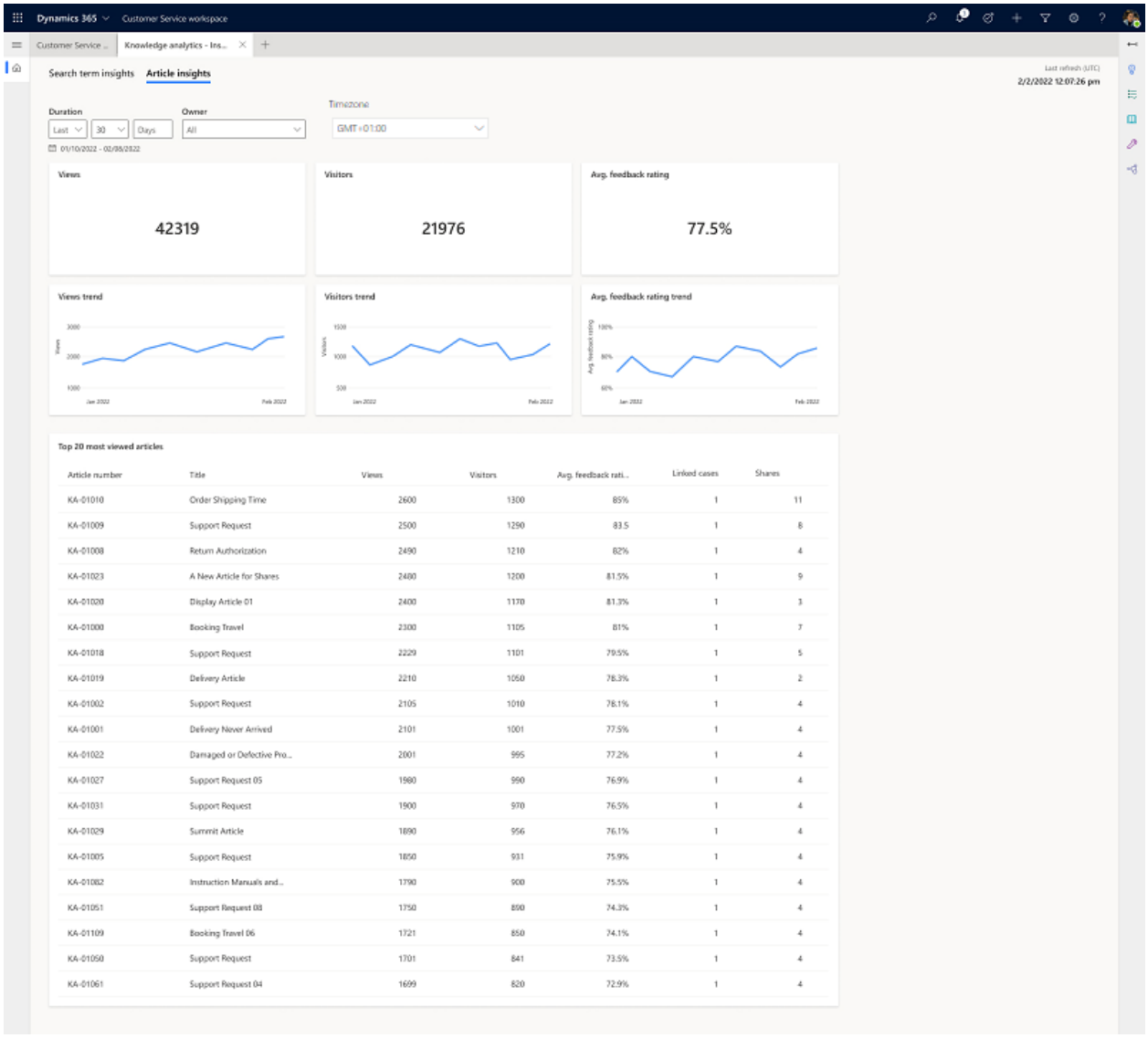
Knowledge analytics helps provide knowledge workers and supervisors with valuable insights about how knowledge articles are being used and searched. Supervisors can use these insights to improve their knowledge management system.

Knowledge analytics includes the following features:

- Article insights
- Search term insights

Article insights

The Article insights dashboard can help your organization's knowledge workers to understand the impact that knowledge management is making on the overall support experience. The insights include details about articles that are shared.



Metrics in Article insights dashboard

The Articles insights dashboard represents the following metrics.

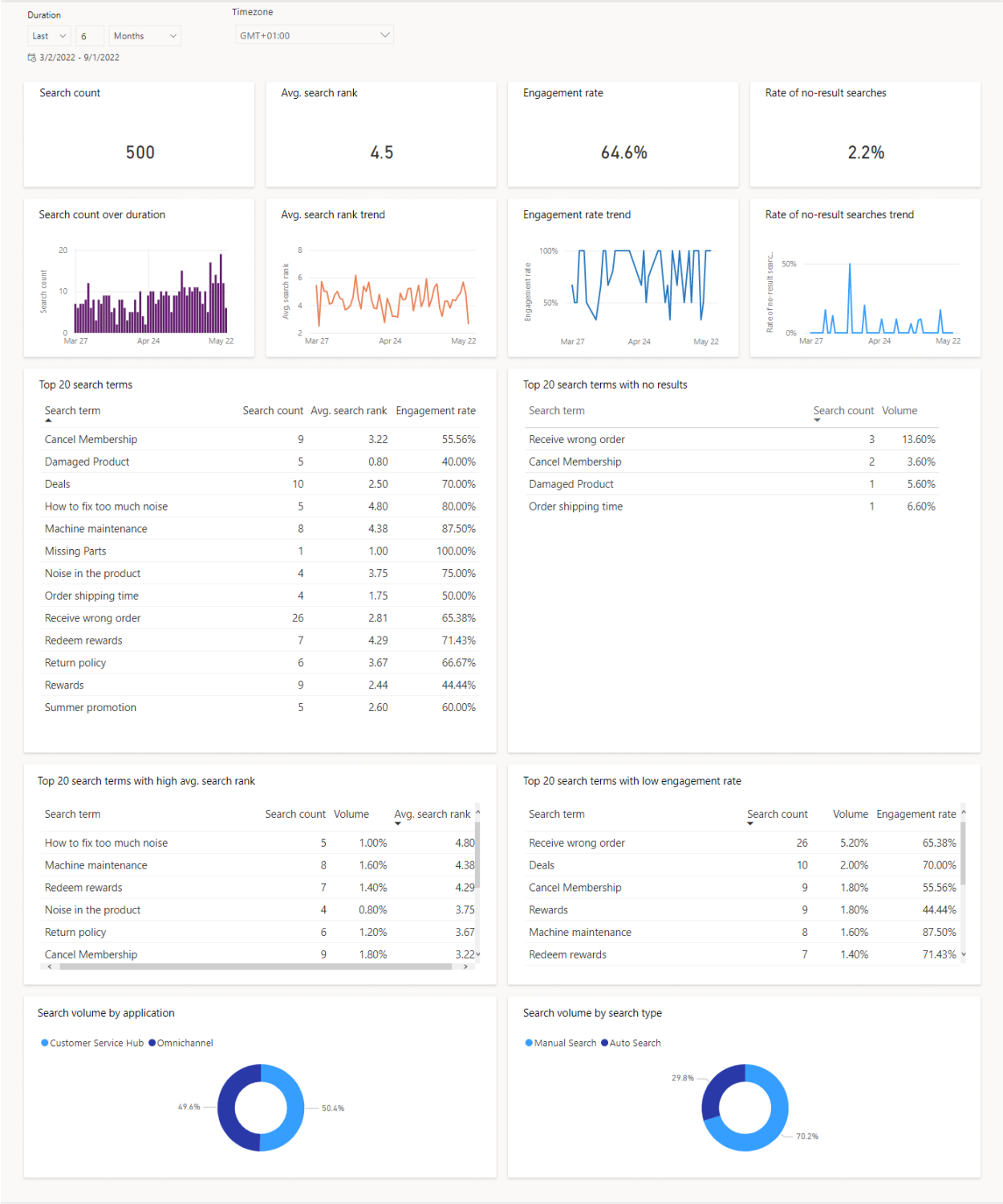
Metrics or chart	Definition
Duration	The duration for which you want to see the report.
Owner	The owner of the knowledge article.
Timezone	The time information according to the time zone that you specify.
Views	The total number of views on the knowledge articles.
Visitors	The total number of unique visitors who viewed the knowledge articles.
Avg. feedback rating trend	The average feedback rating provided by the consumers of the knowledge articles.
Most viewed articles	The top 20 articles used, along with visitors, average feedback rating, linked cases and shares metrics.
Linked cases	The total number of cases that were linked to the articles.
Shares	The total number of the article that were shared by the support representative.

Search term insights

The Search term insights dashboard is designed to provide supervisors and knowledge workers with valuable insights into how agents find and use knowledge articles.

Your administrator must enable the dashboard for you to access it. More information: Configure Knowledge search insights.

> **Note**
>
> Knowledge search term insights won't provide information about customer search behavior. Data is from internal knowledge searches only.



As a knowledge manager, it's your responsibility to maintain and improve your organization's overall knowledge base article offerings. By identifying searches that have low success or return no results, the knowledge Search term insights dashboard can help you identify knowledge gaps, improve search results, and surface the most relevant articles.

Metrics in knowledge Search term insights dashboard

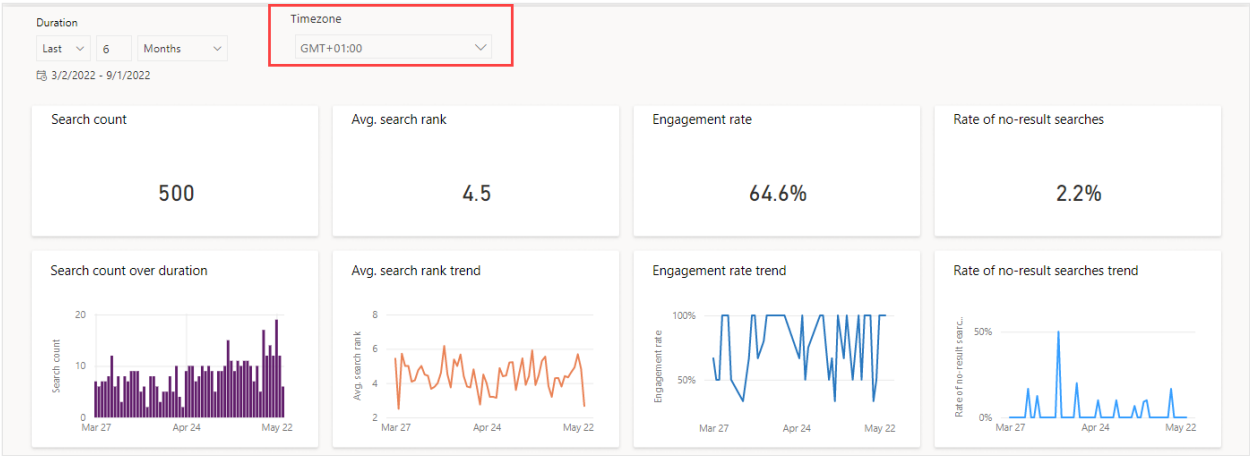
The knowledge Search term insights dashboard represents the following metrics.

KPIs or chart	Definition
Search count	The total number of searches completed within a given period.
Search count over duration	The number of searches completed within a certain amount of time.
Avg. search rank	The average position of the link selected by a user when presented within search results.
Avg. search rate trend	The day-by-day trend of the average list position of the link selected by a user when presented with search results.
Engagement rate	The percentage of events where a user interacted with the search results compared to the search events presented with results.
Engagement rate trend	The day-by-day trend of the percentage of events where a user interacted with the search results compared to the search events presented with results.
Rate of no-result searches	Percentage of instances where the searched term displayed no results.
Rate of no-result searches trend	The day-by-day trend of the percentage of search instances that displayed "no results".
Top 20 search terms	The top 20 terms being searched, showing the number of times searched, the average search rate, and engagement rate.
Top 20 search terms with no results	The top 20 search terms that returned no results when searched.
Top 20 search terms with high avg. search rank	The top 20 search topics by volume with an average click position of greater than five.
Top 20 search terms with low engagement rate	The top 20 search topics by volume with engagement rate of less than 40 percent.
Search volume by application	The percentage of searches across multiple applications.
Search volume by search type	The percentage of searches based on whether they were manual or automatic searches.

View reports in different time zones

Use the Timezone option available in the reports to view the time information according to the time zone that you specify. You can save your preferred time zone settings for

reports as bookmarks. The bookmarks allow you to switch between reports in various time zones, without having to set the time zone. More information: Manage bookmarks for reports



See also

Configure knowledge search insights
Search for knowledge articles
Understand knowledge base search mechanisms
Use embedded knowledge search to set up knowledge management
Manage report bookmarks

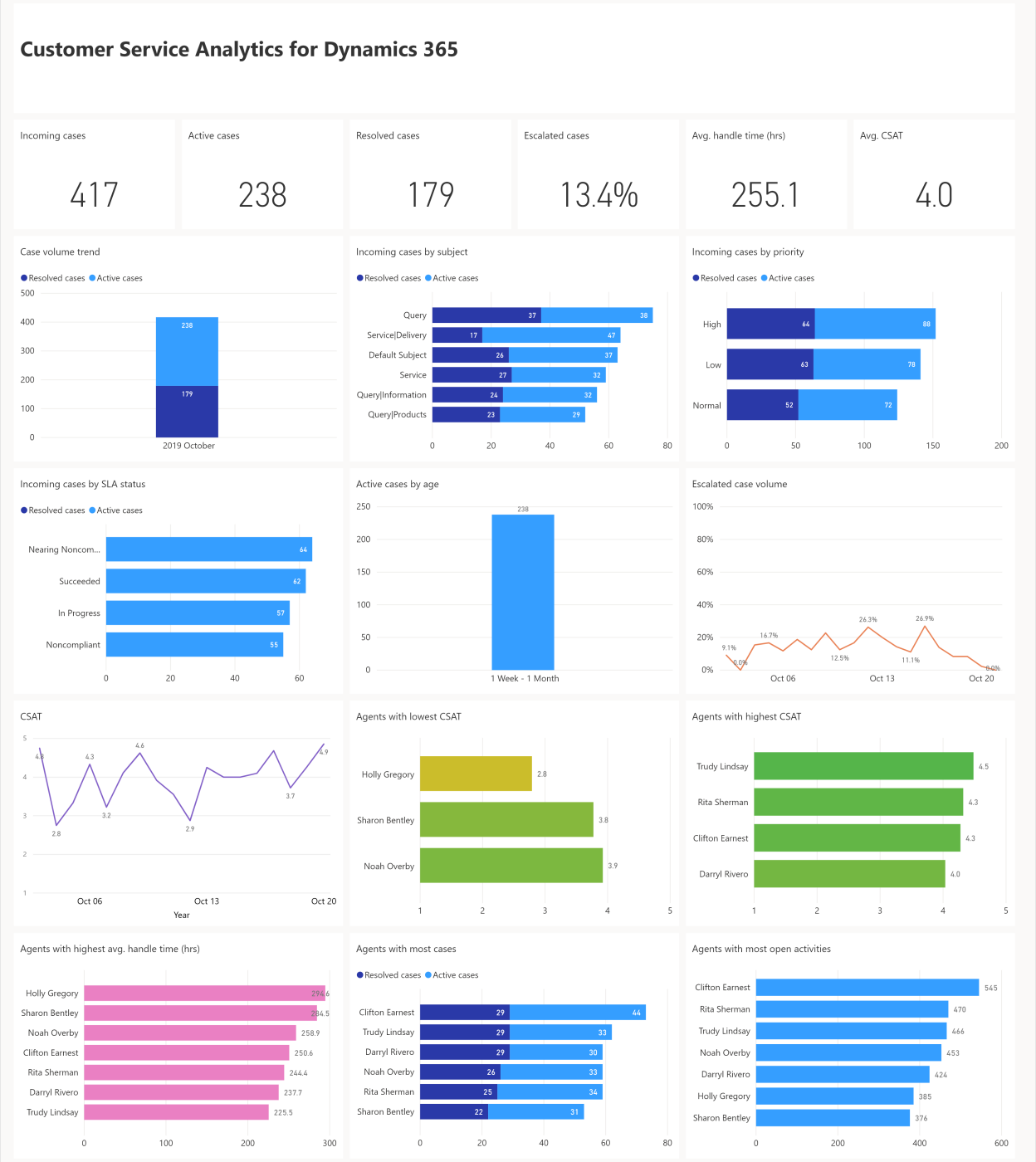
View and understand Customer Service Analytics

Article • 07/14/2021

Customer Service Analytics dashboard

The Customer Service Analytics dashboard that's created in Power BI provides information about the historical operational metrics and key performance indicators (KPIs) to effectively manage contact centers.

The following is an example of the Customer Service Analytics overview dashboard:



This view includes the following KPIs:

KPI	Description
Total cases	The number of cases created to support customers.
Active cases	The number of cases that are currently open.
Resolved cases	The number of cases that have been closed by an agent.
Escalated cases %	The percentage of cases that have been escalated.
Average handle time (hrs)	The average length of time taken by an agent to resolve the case.

KPI	Description
Avg. CSAT	The average customer satisfaction score, based on the survey submitted by the customer.
Case age	The average time the case was in an open state.
Total activities	The total number of activities that were created by agents

This view also includes the following filters:

Filters / Dimensions	Description
Duration	Filters the reporting date range.
Queue	Lets you filter the queue you'd like to drill down to and see all metrics related to that queue.
Agent	Lets you filter the report to show all the agents who report to you, to understand how each is performing and help you develop coaching and training plans.
Priority	Filters the reporting to the selected priority of the case (high, normal, or low).
Subject	Filters the reporting to the selected subject of the case.
Channel	Filters the reporting to the selected Omnichannel for Customer Service channels, such as chat, SMS, or Facebook.

Customer Service Analytics reports

The Customer Service Analytics report detail view has three views:

- Summary
- Agent/queue
- Case/activity list

1. Summary

This view provides KPIs and metrics across Customer Service and gives supervisors the ability to filter the view.

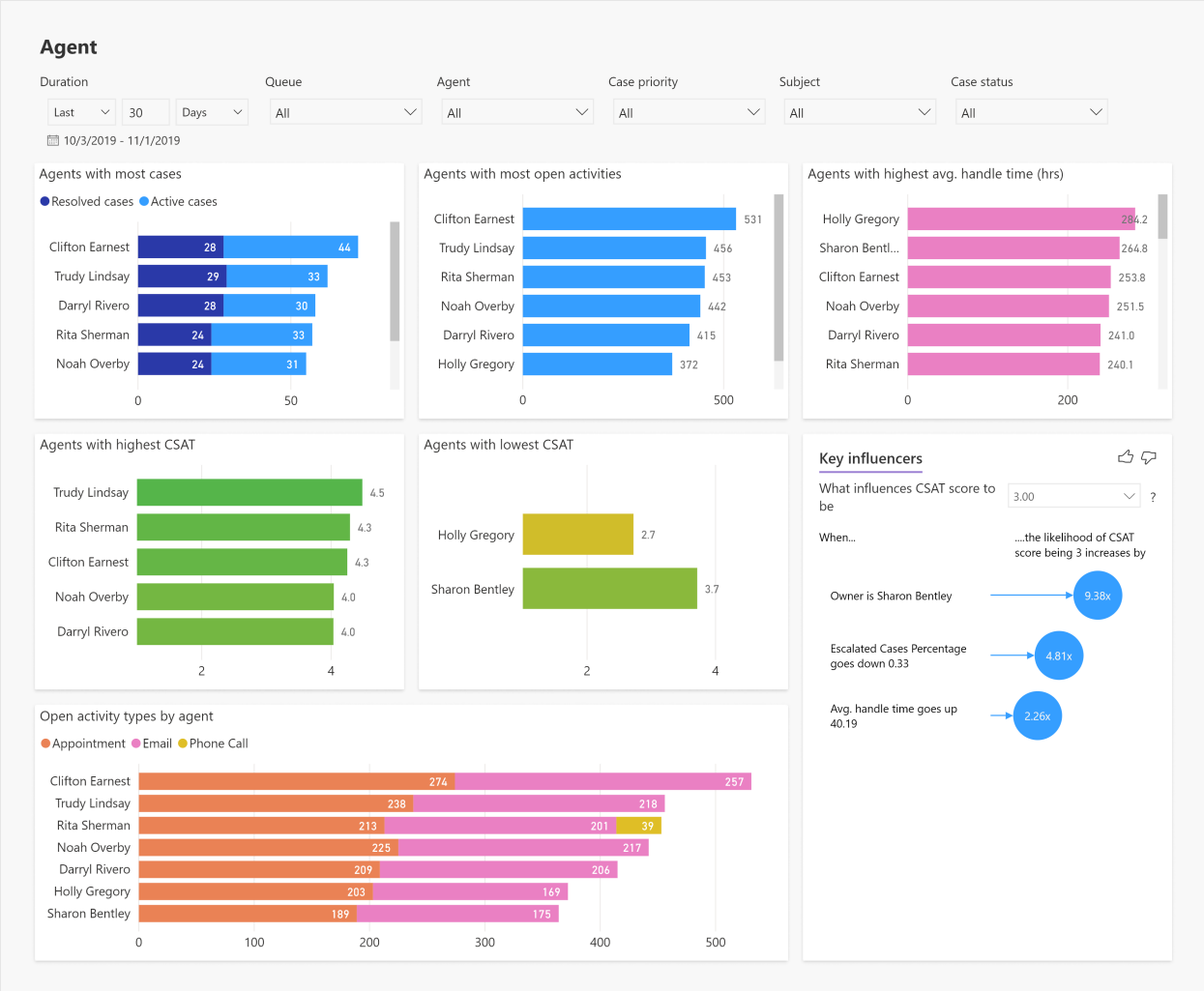
This view contains the following visuals or KPIs:

Visual / KPI	Description
Incoming cases by channel	The volume of cases created in each of the support channels.
Incoming cases by priority	The volume of active and resolved cases, by priority.
Incoming cases by subject	The active and resolved cases, by subject. This considers the last node in the subject hierarchy.

Visual / KPI	Description
Incoming cases by SLA status	The volume of active and resolved cases, by SLA status.
Case volume trend	The trend of active and resolved cases, based on the time the case was created.
Case by age	The cases that are currently open, grouped by the number of days, weeks, and months they've been open.
Escalated case trend	The trend of cases escalated over the period selected.
CSAT trend	The CSAT trend over the period selected.

2. Agent and queue

This view provides KPIs and metrics across Customer Service and gives supervisors the ability to filter the view.



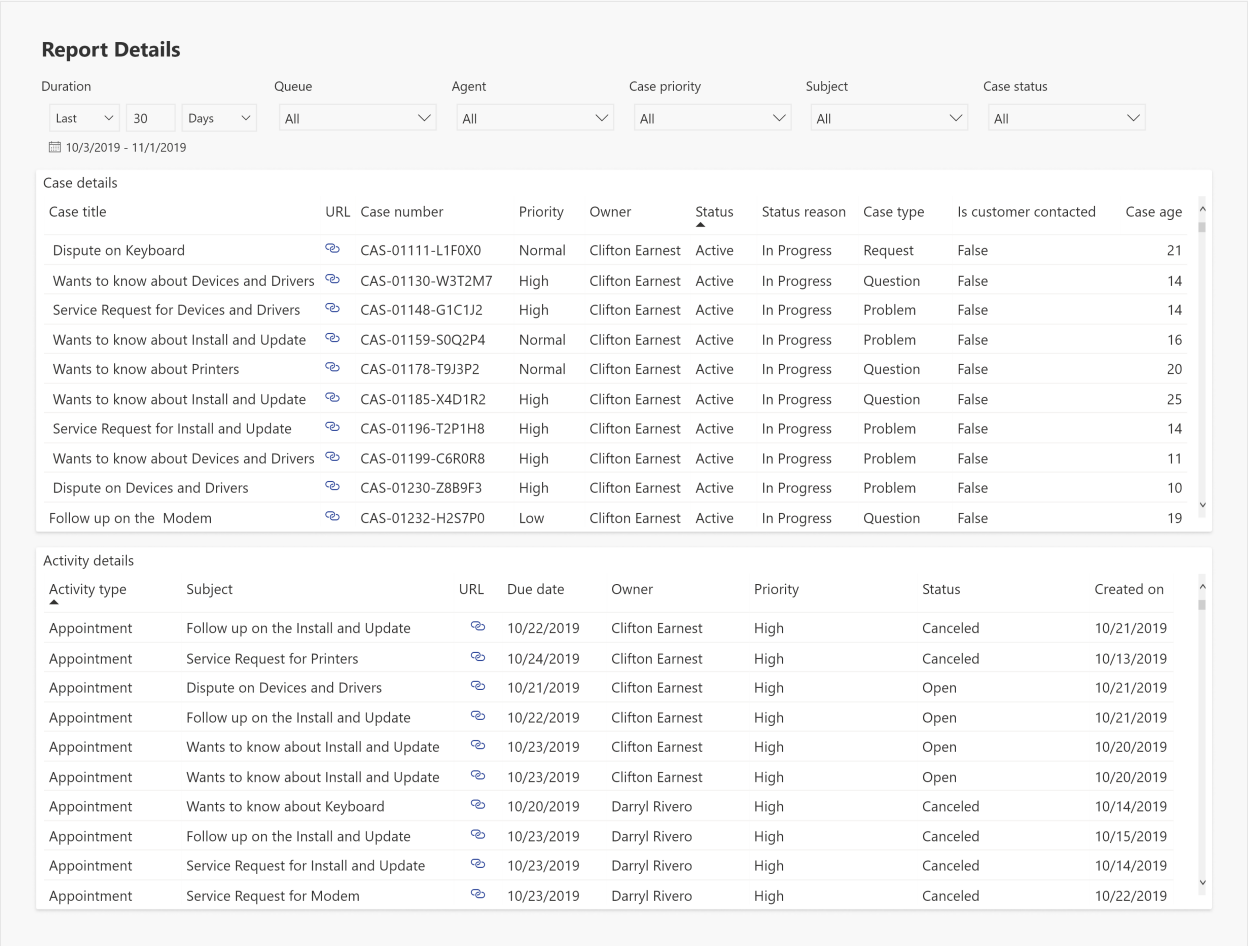
This view contains the following visuals or KPIs:

Visual / KPI	Description
Agents with most cases	Shows the top agents who have handled the most cases, along with the state of those cases.
Agents with most open activities	Shows the agents with the most open activities. This helps you enable agents to clear the backlog.
Agents with highest avg. handle time	Shows the agents with the highest average handle time.
Agents with highest CSAT	Shows the agents with the highest CSAT.
Agents with lowest CSAT	Shows the agents with the lowest CSAT. You can use this information to train agents and improve overall customer satisfaction.
Key influencers for CSAT	Shows the factors that drive the CSAT metric. It analyzes data, ranks the factors that matter, and displays them as key influencers.
Open activities by agent	Shows the number of open activities by agent and type of activity.

3. Case and activity list

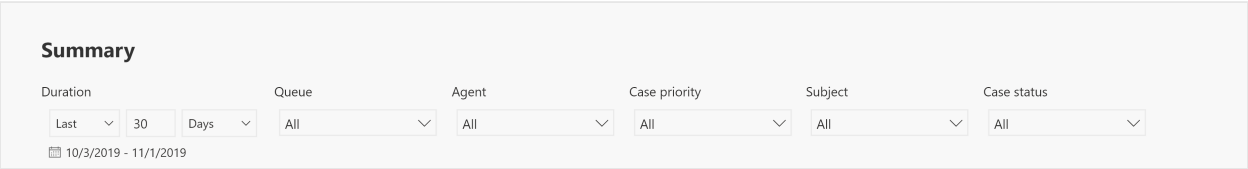
This section provides a detailed view of cases and activities that you can use to drill down to each case or activity to help resolve customer issues. The link in this report directs you to the Customer Service Hub app or Customer Service app.

> ⓘ **Note**
>
> Prerequisite for the link to work: you must have either a Customer Service Hub app or Customer Service app installed from AppSource.



View and filter report

Filter information by viewing the reports and selecting from Duration, Queue, Agent, Case priority, Subject, and Case status.



Select the subject you're interested in, and information is filtered according to your selection. This helps to quickly analyze KPIs and take necessary steps to improve outcomes.

See also

Introduction to Customer Service analytics and insights
Configure Customer Service analytics and insights in Customer Service Hub
View and understand Customer Service analytics and insights in Customer Service Hub
Configure Customer Service Analytics in Power BI

Introduction to Omnichannel Insights dashboard

Article • 07/13/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

Customer service managers or supervisors are responsible for managing the agents who work to resolve customer queries every day through various service channels, including Chat for Dynamics 365 Customer Service. They need to know key operational metrics to ensure that their agents are providing quality support. Supervisors can see trends in these metrics over a period of time to understand how agents and queues are performing, so that they can take corrective measures, provide appropriate guidance to agents, and improve the customer support experience.

Supervisors can use Omnichannel Insights to perform the following tasks:

- Monitor operational metrics across channels, queues, and agents.

- Monitor support quality via sentiment analysis across channels, queues, and agents.

> **Note**
>
> Contact your system administrator for configuration errors or if you are unable to view the dashboards. To learn more, see **Configure Omnichannel Insights dashboards**.

Prerequisites

Verify the following prerequisites before you use the Omnichannel Chat and Sentiment Analysis dashboards:

- Omnichannel supervisor role is assigned. To learn more, see Assign roles and enable users for Omnichannel for Customer Service.
- A user is added in a supervisor configuration. To learn more, see Add users to supervisor configuration.

See also

Configure Omnichannel Insights dashboards

View and understand Omnichannel Insights dashboards

View and understand Omnichannel Insights dashboards

Article • 07/03/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Omnichannel Insights

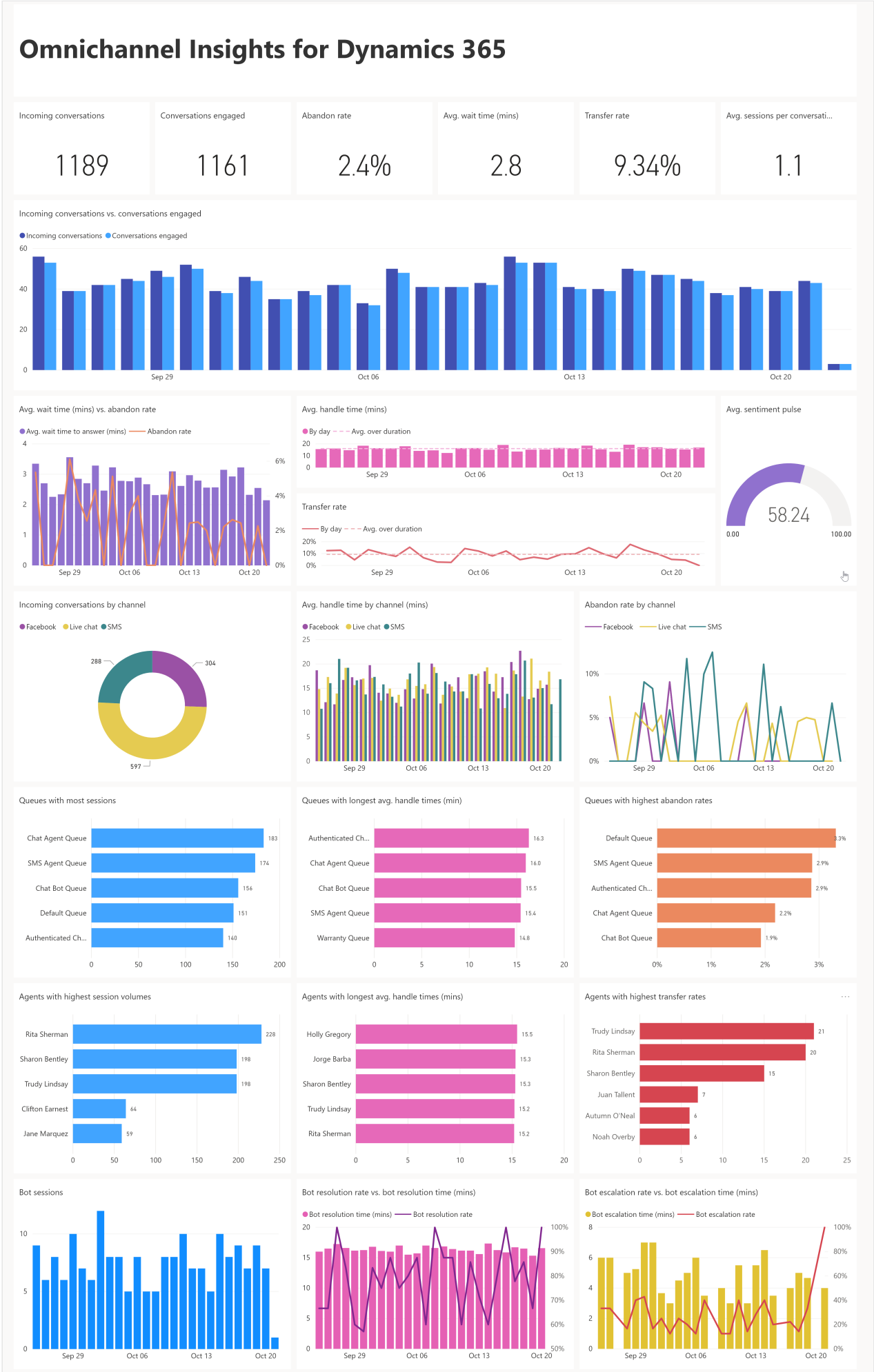
The Omnichannel Insights dashboard provides KPIs and trends for supervisors to understand the overall state of the support experience at a glance. It also provides insights on the customer sentiments derived using support-specific machine learning algorithms with an ability to slice through different levels in the organizational hierarchy. Supervisors can rely on the information to improve the overall customer support experience.

The overview dashboard is divided into two sections:

- Omnichannel Insights dashboard
- Omnichannel Sentiment Analysis dashboard

Omnichannel Insights dashboard

The following illustration is an example of the Omnichannel Insights for Dynamics 365 dashboard.



The following table describes the conversation KPIs.

KPI	Description
Incoming conversations	The number of conversations initiated by the customer.
Conversations engaged	Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point.
Average wait time (mins)	The length of time, in minutes, a customer is waiting in a queue.
Average wait time	Total length of time (in minutes) / Offered
Abandon Rate	The percentage of conversations that aren't engaged by agents.
Average Handle Time (mins)	Average length of time an agent takes to complete a conversation with a customer. This time considers the time spent by one or more agents to help the customer.
Transfer rate	The percentage of conversations that are transferred to another agent/queue.
Average Customer Sentiment Pulse (CSP)	The predicted customer sentiment in a given timeframe for a set queue or agent, which indicates the degree of positive sentiment expressed by customers at the end of their interactions.
Average customer effort time	Average length of time a customer takes to contact support and complete a conversation with an agent. Only the conversations engaged by an agent are considered for this metric.

Omnichannel Insights for Dynamics 365

Omnichannel Insights reports provide comprehensive information on how overall support is performing across channels. The reports provide administrators and supervisors with a rich visualization and ability to filter across channels, queues, agents, and date ranges to better understand performance and troubleshoot problem areas.

The reporting structure consists of the following sections:

- Conversations and channels
- Queue and agents
- Bot insights

Conversations and channels

This section provides historical visibility into the overall support operations across various conversations and channels.

Conversation

Duration: Last 30 Days | 9/16/2020 - 10/15/2020

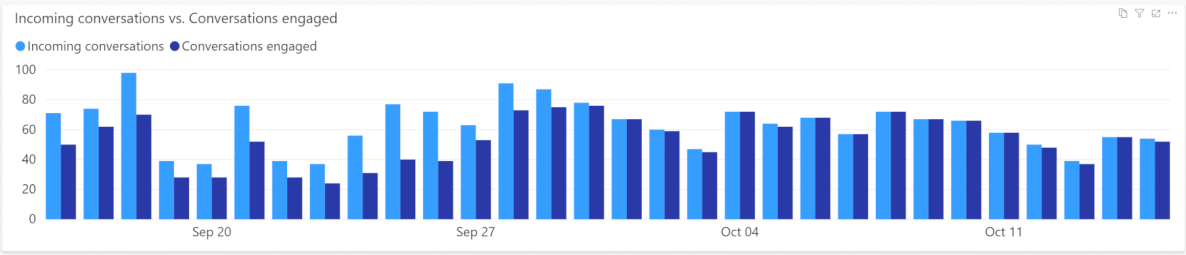
Channel: All

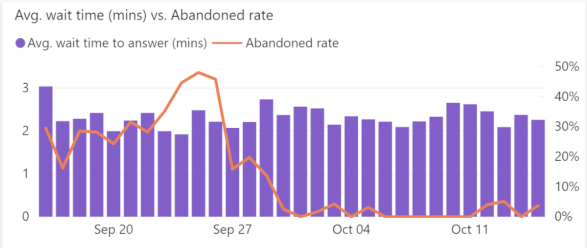
Queue: All

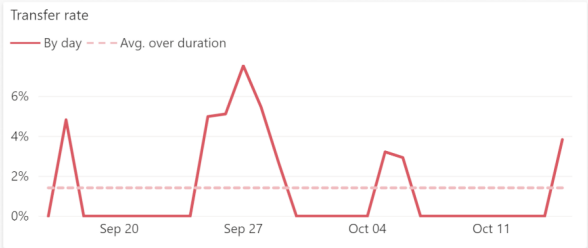
Agent: All

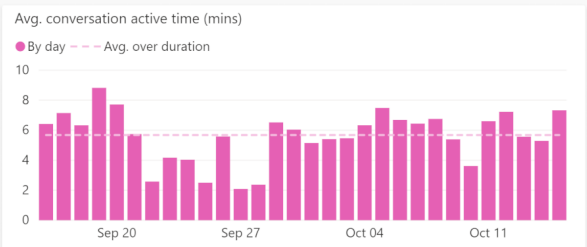
Conversation status: All

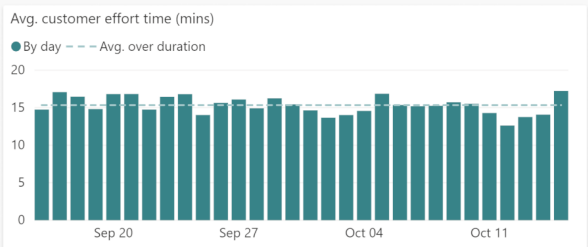
Incoming conversations	Conversations engaged	Abandon rate	Avg. wait time (mins)	Transfer rate	Avg. sessions per convers...
1891	1614	14.6%	2.3	1.4%	1.0







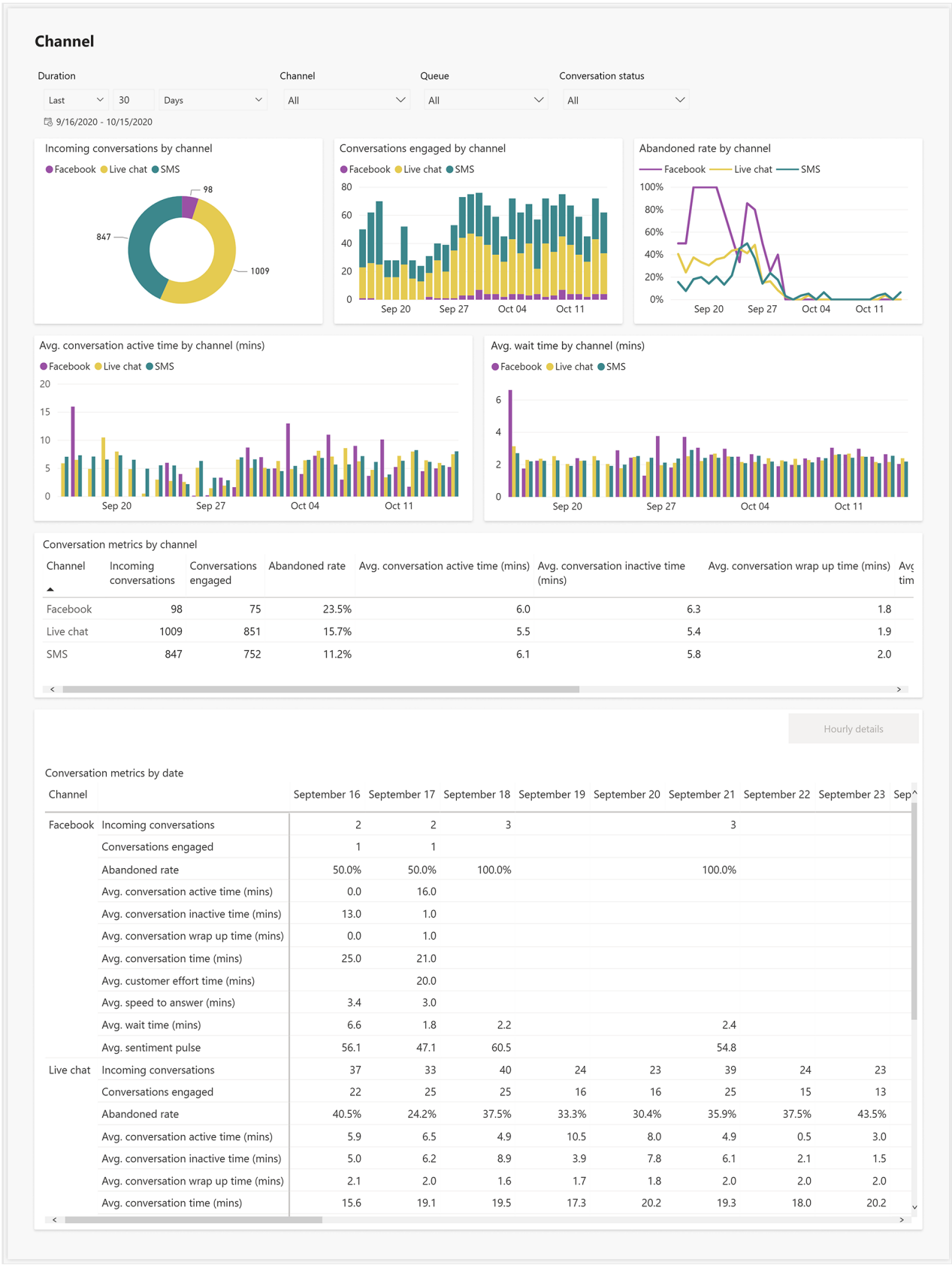




Hourly details

Conversation metrics

	October 4	October 5	October 6	October 7	October 8	October 9	October 10	October 11	October 12	October 13	October 14	Octob
Incoming conversations	72	64	68	57	72	67	66	58	50	39	55	
Conversations engaged	72	62	68	57	72	67	66	58	48	37	55	
Abandoned rate	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	5.1%	0.0%	
Transfer rate	0.0%	3.2%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Avg. conversation active time (mins)	6.3	7.5	6.7	6.4	6.8	5.4	3.6	6.6	7.2	5.6	5.3	
Avg. conversation inactive time (mins)	5.8	6.0	6.8	6.1	5.7	5.6	3.7	5.3	5.6	6.2	5.9	



The KPIs for conversations and channels are listed in the following table. For conversations, these KPIs are applicable to scenarios in which bots escalate to agents or agents directly handle customer calls. The KPIs for channels represent support operations by each channel to help supervisors easily understand how each support channel is performing, and take appropriate actions to improve the overall support experience for customers.

KPI	Description	Derivation	Measure
Incoming conversations	The number of conversations initiated by the customers that can be presented to agents.	All conversations are considered.	FactConversation[InComingConversationCount]
Conversations engaged	Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point.	All conversations are considered.	FactConversation[Engaged]
Abandon rate	The percentage of conversations that aren't engaged by agents.	All conversations are considered.	FactConversation[AbandonedRate]
Transfer rate	The percentage of conversations that are transferred to another agent or queue.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[TransferRate]
Conversation active time	Cumulative session active time for a conversation.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[ConversationActiveTime]
Conversation inactive time	Cumulative session inactive time for a conversation.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[ConversationInactiveTime]

KPI	Description	Derivation	Measure
Conversation wrap time	Cumulative time from the conversation wrap-up start time until the conversation close time.	Conversations engaged and conversations that are in the closed state are considered.	FactConversationFirstAgentParticipant[ConversationWrapupTime]
Conversation handle time	Cumulative session active time for a conversation.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[ConversationActiveTime]
Average Conversation active time	Total conversation active time divided by the number of conversations handled.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[AvgActiveTime(mins)]
Average Conversation inactive time	Total conversation inactive time divided by the number of conversations handled.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[AverageConversationInactiveTime]
Average Conversation wrap time	Total conversation wrap time divided by the number of conversations handled.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[AverageConversationWrapupTime)]
Average Conversation handle time	Total Conversation active time divided by the number of conversations handled.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[AvgConversationTime]

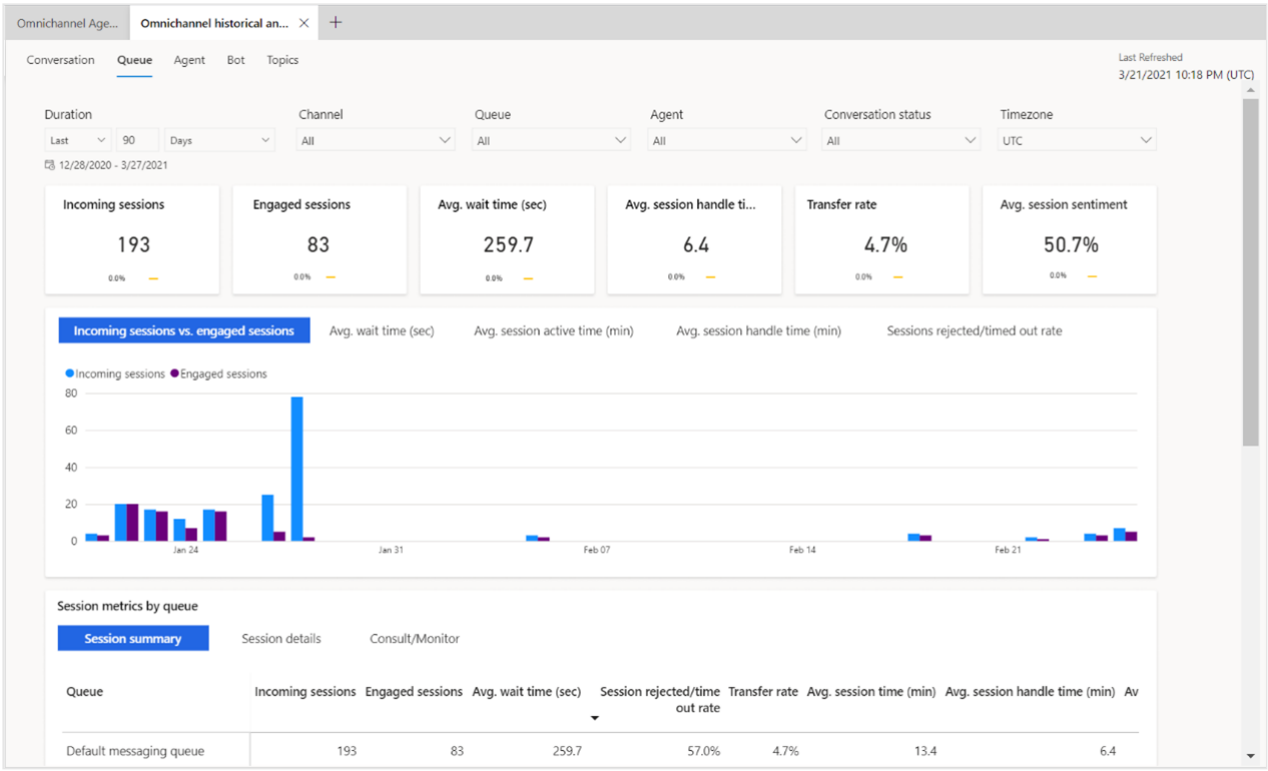
KPI	Description	Derivation	Measure
Average Conversation time	Average time from the conversation start to conversation end.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[AvgConversationTime]
Average Customer Effort time	Average time from the conversation start to the conversation wrap-up start time.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[AvgCustomerEffort]
Speed to answer	The average time customers have waited in the queue before connecting to an agent.	Conversations engaged and conversations that are in the closed state are considered.	FactConversation[AvgSpeedtoAnswer]
SLA - Speed to answer	Number of SLAs met divided by the number of conversations handled. For example, if the Speed to answer is less than 180 seconds, then this is considered met. Otherwise, it isn't met.	Conversations engaged and conversations that are in the closed state are considered.	FactMessage[SLASpeedtoAnswer]

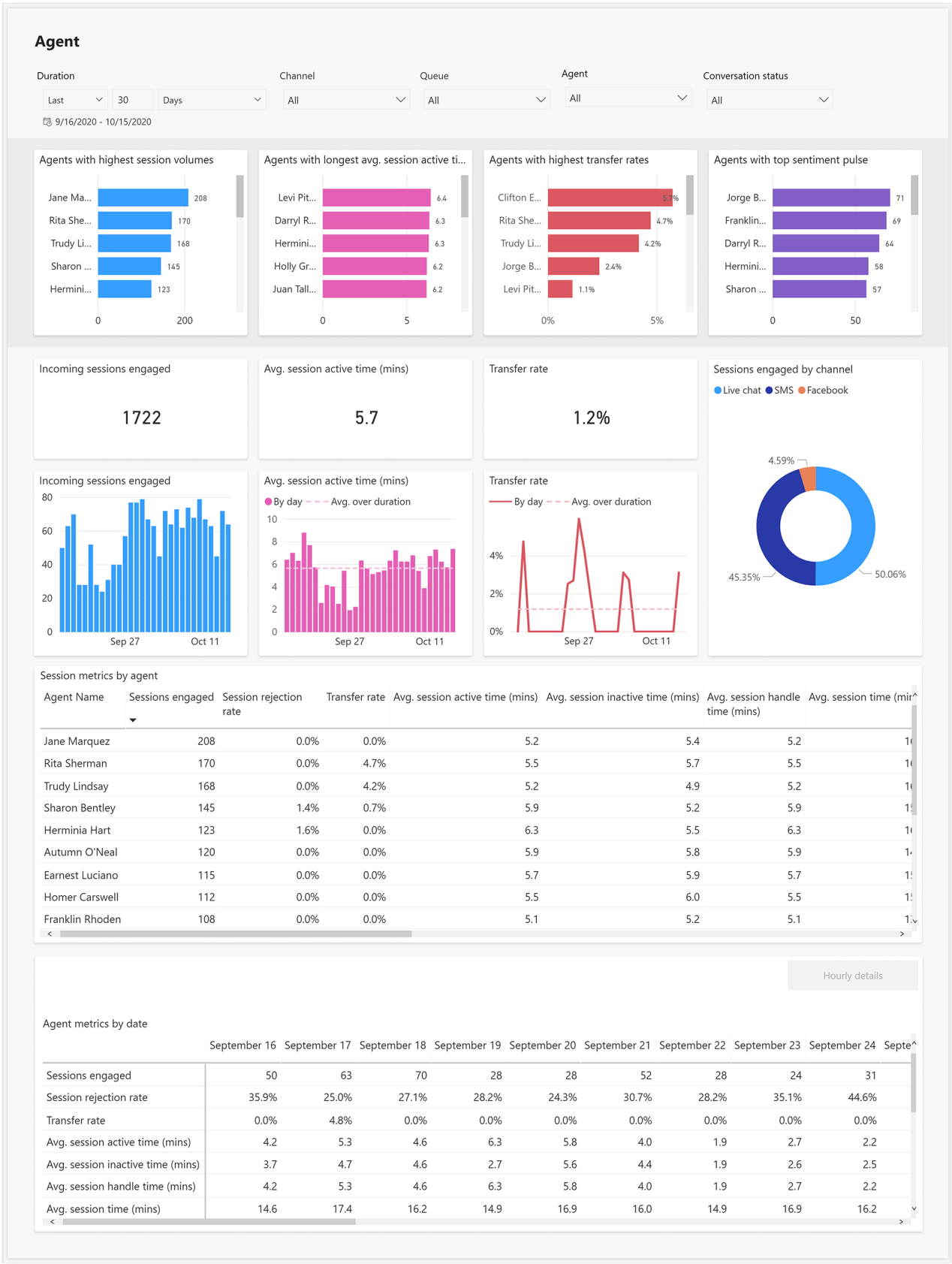
KPI	Description	Derivation	Measure
Customer wait time	The average time customers have waited before connecting to agents. This is similar to "Speed to answer" but includes the time waited on each session within a conversation.	Conversations engaged are considered.	FactConversationParticipant[AvgWaittime(mins)]
Total consult time	The time spent on the consult from when the agent joined to when they left in session participant.	Only consult sessions are considered as a denominator.	
Average consult time	Total consult time divided by the total consult sessions.	Only consult sessions are considered as a denominator.	FactSessionParticipant[AvgConsultTime]
Total monitor time	The time spent on the monitor from when the agent joined to when they left in session participant.	Only monitor sessions are considered as a denominator.	
Average monitor time	The total monitor time divided by the total of monitor sessions.	Only monitor sessions are considered as a denominator.	FactSessionParticipant[AvgMonitorTime]

KPI	Description	Derivation	Measure
Average Customer sentiment pulse (CSP)	The predicted customer sentiment in a given timeframe for a set queue or agent, which indicates the degree of positive sentiment expressed by customers at the end of their interactions.	Conversations engaged are considered.	Average of FactConversationSentiment[msdyn_sentimentpulse]

Queue and agents

The Queue and Agent sections provide historical visibility into how each queue and agent is performing across different channels and queues so that supervisors can take appropriate steps to improve the support experience for the customer.





The KPIs for queues and agents are listed in the following table. Metrics in this section are computed based on the session granularity. Each customer contact is defined as a conversation. Each conversation is defined as a session and can be handled by one or more agents.

KPI	Description	Derivation	Measure

KPI	Description	Derivation	Measure
Consult sessions	The number of sessions accepted by a user in mode = consult.	Only consult sessions are considered as a denominator	
Total consult time	The time spent on the consult from when the agent joined to when they left in session participant.	Only consult sessions are considered as a denominator.	
Average consult time	The total consult time divided by the total consult sessions.	Only consult sessions are considered as a denominator.	FactSessionParticipant[AvgConsultTime]
Monitor sessions	The number of sessions accepted by a user in mode = monitor.	Only monitor sessions are considered as a denominator.	
Total monitor time	The time spent on the monitor from when the agent joined to when they left in session participant.	Only monitor sessions are considered as a denominator.	
Average monitor time	The total monitor time divided by the total of monitor sessions.	Only monitor sessions are considered as a denominator.	FactSessionParticipant[AvgMonitorTime]

KPI	Description	Derivation	Measure
Sessions engaged	# Sessions presented to an agent and accepted by an agent	Conversations engaged are considered and all conversation states are considered.	FactSession[EngagedByAgentSessionCount]
Session rejection rate	The number of sessions presented to an agent and aren't accepted by an agent.	Conversations engaged are considered and all conversation state are considered.	FactSession[SessionRejectionRate]
Transfer rate	The number of sessions transferred by an agent.	Conversations engaged are considered and all conversation states are considered.	FactSession[QueueTransferRate]
Consult sessions	The number of sessions where the agent has participated in consult mode.	Conversations engaged are considered and all conversation states are considered.	FactSessionParticipant[ConsultSessionCount]
Monitor sessions	The number of sessions where the agent has participated in monitor mode.	Conversations engaged are considered and all conversation states are considered.	FactSessionParticipant[MonitorSessionCount]
Average Session active time	The total session active time divided by the number of sessions engaged (primary).	Conversations engaged are considered and all conversation states are considered.	FactSession[AvgActivetime]

KPI	Description	Derivation	Measure
Average Session inactive time	the total session inactive time divided by the number of sessions engaged (primary).	Conversations engaged are considered and all conversation states are considered.	FactConversationFirstAgentParticipant[AverageSessionInactiveTime]
Average Session handle time	The total session active time divided by the number of sessions engaged (primary).	Conversations engaged are considered and all conversation states are considered.	FactSession[AvgSessionHandleTime]
Average Session time	The average time from the session start to session end for sessions engaged divided by the sessions engaged (primary).	Conversations engaged are considered and all conversation states are considered.	FactConversationFirstAgentParticipant[AvgSessionTime]
Average consult time	The average time the agent spent on a session in consulting mode.	The sum of consult time divided by consult sessions.	FactSessionParticipant[AvgConsultTime]
Average monitor time	The session level average time the agent spent on a session in monitoring mode.	The sum of monitor time divided by monitor sessions.	FactSessionParticipant[AvgMonitorTime]

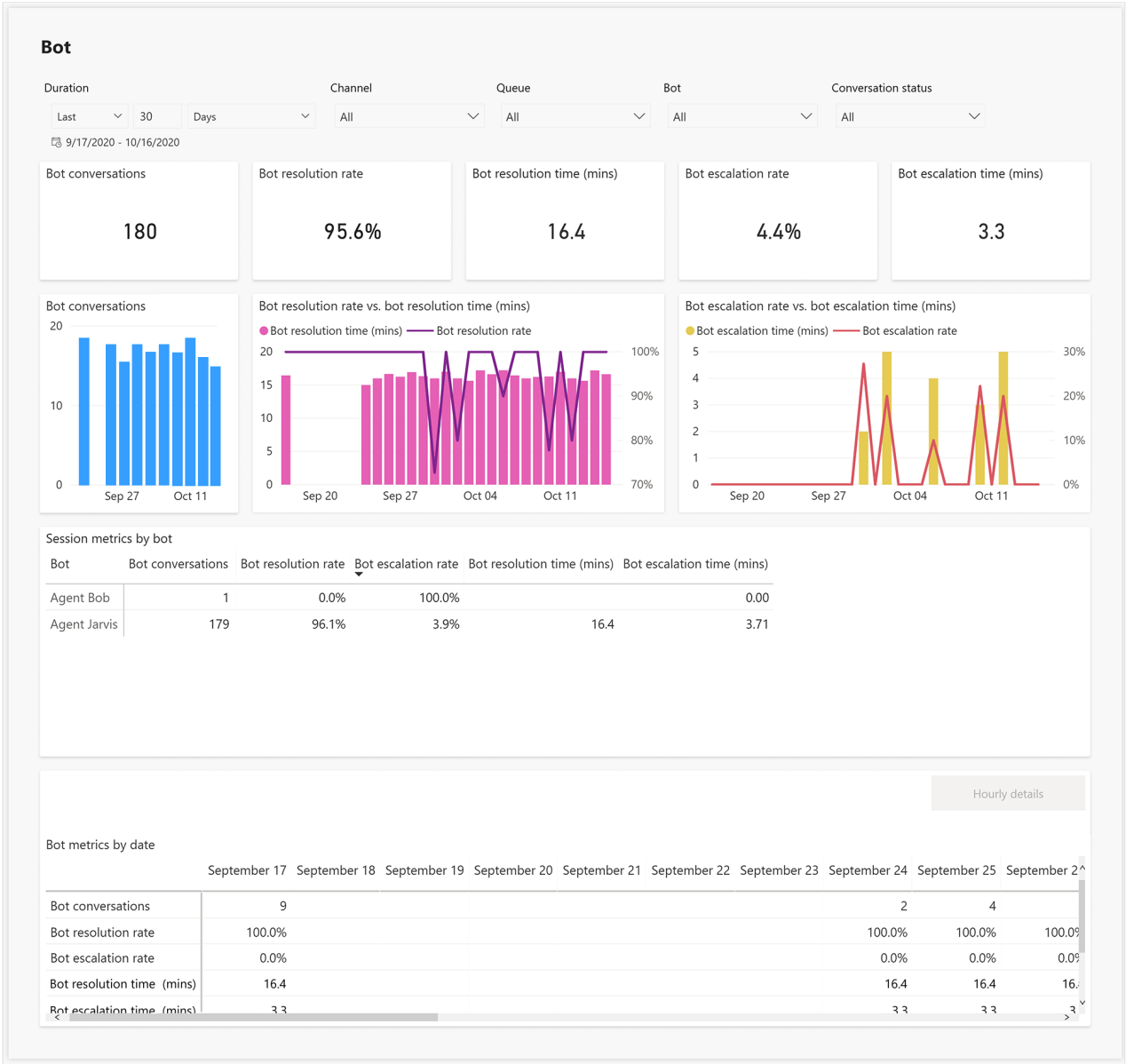
KPI	Description	Derivation	Measure
Session active time	The time an agent actively spent on a session.	Conversations engaged are considered and all conversation states are considered.	
Session inactive time.	The time an agent isn't actively working on a session.	Conversations engaged are considered and all conversation states are considered.	
Session handle time	the time an agent actively spent on a session.	Conversations engaged are considered and all conversation states are considered.	
Agent total login time	The total time the agent is signed in. Note: This metric isn't sliced in any dimension other than from Date and Agent.	This is based on the agent sign in and sign out timestamp, and isn't sliced by any other metrics other than from Date and Agent.	FactAgentStatusHistory[AgentTotalLoginTime(hrs)]
Agent Total Login Time (hrs)	The time an agent is signed in to the Omnichannel application.	This is based on the agent sign in and sign out timestamp, and isn't sliced by any other metrics other than from Date and Agent.	FactAgentStatusHistory[AgentTotalLoginTime(hrs)]

KPI	Description	Derivation	Measure
Agent Available Duration (hrs)	The time an agent is in the available state in the Omnichannel application.	This is based on the agent sign in and sign out timestamp, and isn't sliced by any other metrics other than from Date and Agent.	FactAgentStatusHistory[AgentAvailableDuration(hrs)]
Agent Busy Duration (hrs)	Time an agent in the busy state in Omnichannel application.	This is based on the agent sign in and sign out timestamp, and isn't sliced by any other metrics other than from Date and Agent.	FactAgentStatusHistory[AgentBusyDuration(hrs))]
Agent Busy DND Duration (hrs)	The time an agent is in the Busy DND state in the Omnichannel application.	This is based on the agent sign in and sign out timestamp, and isn't sliced by any other metrics other than from Date and Agent.	FactAgentStatusHistory[AgentBusyDNDDuration(hrs)]
Agent Away Duration (hrs)	The time an agent is in the Away state in the Omnichannel application	This is based on the agent sign in and sign out timestamp, and isn't sliced by any other metrics other than from Date and Agent.	FactAgentStatusHistory[AgentAwayDuration(hrs))]

KPI	Description	Derivation	Measure
Agent Offline Duration (hrs)	The time an agent signed out of the Omnichannel application.	This is based on the agent sign in and sign out timestamp, and isn't sliced by any other metrics other than from Date and Agent.	FactAgentStatusHistory[AgentOfflineDuration(hrs))]

Bot insights

This section provides historical visibility into how bots are performing to help resolve customer support issues.



The KPIs for bots are listed in the following table.

KPI	Description	Derivation	Measure
Bot conversations	The number of conversations initiated by the customer and handled by a bot.	All conversations are considered.	FactSession[QueueSessions]
Bot resolution rate	The percentage of conversations that were closed by interacting with a bot out of all conversations handled by a bot.	All conversations are considered.	FactSession[BOTResolutionRate]
Bot resolution time (mins)	The length of time, in minutes, a customer interacted with a bot before the conversation was closed.	All conversations are considered.	FactSession[AvgResolutionTime]
Bot escalation rate	The percentage of conversations that are escalated by a bot to a human agent.	All conversations are considered.	FactSession[BotEscalationRate]
Bot escalation time (mins)	The length of time, in minutes, a customer interacted with a bot before the conversation was escalated to a human agent.	All conversations are considered.	FactSession[BotEscalationTime]

Omnichannel Sentiment Analysis dashboard

The Omnichannel Sentiment Analysis dashboard provides an overview of important KPIs and trends related to the sentiment analysis of conversations.

Omnichannel Insights – Sentiment Analysis report

The following table provides a detailed view of the Omnichannel Sentiment Analysis report.

KPI	Description
Average Sentiment Pulse	The predicted customer sentiment in a given timeframe for a set queue or agent that indicates the degree of positive sentiment expressed by customers at the end of their interactions. For channel and queue, it provides the overall customer sentiment of the conversation. For agent, it provides the customer sentiment specific to the sessions handled by the agent in the conversation.
% Positive Sentiment	Count of positive sentiment zone conversations divided by total sessions.
% Neutral Sentiment	Count of neutral sentiment zone conversations divided by total sessions.

KPI	Description
% Negative Sentiment	Count of negative sentiment zone conversations divided by total sessions.
Conversations with Sentiment prediction	Count of conversations to predict the customer sentiment metrics.

Sentiment zones

Positive sentiment

Positive sentiment is expressed by the customer writing messages that they're happy, pleased, or positive as a result of the support interaction. Positive sentiment requires the positive words to convey positive feeling beyond simple pleasantries or politeness.

For example, when a customer writes "thank you," that's just being polite—it doesn't necessarily mean they're pleased or happy. However, if a customer writes "I can't thank you enough" or "thank you very much," that portrays clear positive feeling. Other examples of simple pleasantries or politeness that shouldn't be mischaracterized as positive are "Please help" and "Yes."

Negative sentiment

Negative sentiment is expressed by the customer when they're disappointed with the support interaction. These can be cases where the customer is describing a problem and is frustrated or unhappy because of how it's currently affecting them. For something to be scored with negative sentiment, the words need to clearly convey that the user is unhappy, disappointed, or frustrated.

Neutral sentiment

Neutral sentiment is represented when a customer's sentiment was neither positive nor negative. A customer's problem statement isn't to be scored as negative; rather, it should be scored neutral unless it contains words that denote emotion. This is true regardless of how severe the user's problem is. Messages with non-specific pleasantries or politeness are scored as neutral and not as positive.

View and filter reports

You can filter the information presented in the reports by selecting **Duration**, **Channel**, **Queue,** and **Agent**.

See also

Introduction to Omnichannel Insights dashboard

Configure Omnichannel Insights dashboard

Analyze real-time customer sentiment

Monitor, assign, transfer, and forcibly end conversations

Article • 11/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

As a supervisor, you can monitor, assign, transfer, or end conversations that are being handled by your agents by using the **Omnichannel Ongoing Conversations** dashboard. More information: Omnichannel Ongoing Conversations dashboard

When you monitor conversations, you can understand how they're being handled by your agents and also check whether any conversation needs your immediate attention. You can also view customer sentiment and agent responses.

To be able to monitor, assign, transfer, or close conversations, your administrator must enable the respective settings–**Supervisor Monitor**, **Supervisor Assign**, **Supervisor**

Transfer, or **Force Close**–in the admin app. More information: Enable your supervisors to monitor, assign, transfer, and forcibly end conversations

Monitor and join conversations

As a supervisor, you can monitor or assign conversations that are configured for all channels except records. You can monitor all conversations that are in the **Active** or **Wrap-up** states. By joining the conversation, you provide necessary details to both the agent and customer in the communication panel.

You can't monitor conversations that are assigned to you.

1. Sign in to Dynamics 365 and go to the Customer Service workspace or Omnichannel for Customer Service app.
2. From the dashboard view selector, select the **Omnichannel Ongoing Conversations** dashboard. The list of conversations currently being handled by your agents is displayed.
3. Select a conversation that you want to monitor, and select **Monitor**. The conversation page opens.
4. Optionally, to join a conversation, select **Join chat** in the communication panel.

   When you join the conversation, both the agent and the customer receive notifications that you've joined. Depending on your requirements, you can consult with the agent and customer. For more information, go to View communication panel.

Assign conversations

To manually assign a conversation, the conversation should be in an open state and not assigned to any agent. As a supervisor, you can override the agent's presence and allocated capacity when assigning conversations to them. When you override agent capacity, the number of units by which their capacity is exceeded is displayed.

1. From the dashboard view selector in Omnichannel for Customer Service, select the **Omnichannel Ongoing Conversations** dashboard.
2. Select a conversation in an **Open** state, and then select **Assign**.
3. In the **Assign conversations** dialog box, select **Agent** or **Queue**.

> If you select **Agent**, only those agents whose presence matches with one of the allowed presence values in the workstream configuration are displayed. If you select **Queue**, all other queues—except the one to which the conversation is currently assigned—are displayed.

4. Select **Assign**.

The conversation is now assigned to the agent or queue that you selected.

> ⓘ **Note**
>
> If you're unable to assign conversations successfully, verify that the **Omnichannel API access** role isn't assigned to you.

Transfer conversations

You can transfer ongoing conversations that are in the **Active** or **Waiting** states. You can transfer all conversations that take place on messaging channels such as Live Chat, SMS, or WhatsApp. However, if and when these conversations switch from the text mode to elevated voice or video modes, you can't transfer them across agents.

You can transfer conversations to and from agents only, not bots.

1. From the dashboard view selector in Omnichannel for Customer Service, select the **Omnichannel Ongoing Conversations** dashboard.
2. Select a conversation in the **Active** or **Waiting** state, and then select **Transfer**.
3. In the **Transfer conversations** dialog box, select an agent from the list of agents that appears.

   A list of agents belonging to the same queue and whose presence matches with one of the allowed presence values in the workstream configuration is displayed.
4. Select **Transfer**. The selected conversation is transferred to the agent.

When you transfer an **Active** conversation from one agent to another, the first agent is added as a consultant to the conversation that's now being managed by the second agent. The conversation is successfully transferred when the second agent acknowledges the notification by selecting **Accept** or **Reject**. Refresh the dashboard if you don't get an updated status as a result of network issues or delays in acknowledgment.

End conversations forcibly

> ⊗ **Caution**
>
> We recommend that you use this feature judiciously to end agent conversations.

End voice calls and conversations that take place on the voice and messaging channels. After the conversation ends, its status is set to **Closed**.

1. From the dashboard view selector in Omnichannel for Customer Service, select the **Omnichannel Ongoing Conversations** dashboard.
2. Select a conversation and then select **Force Close**.

The participants receive a notification that their conversation was ended by a supervisor.

See also

Configure Intraday insights dashboard for Unified Service Desk
Enable sentiment analysis
Enable Supervisor settings in Omnichannel for Customer Service

Sentiment monitoring

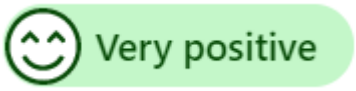
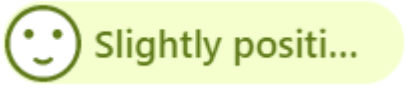
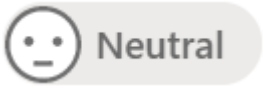
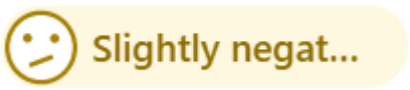
Article • 07/07/2021

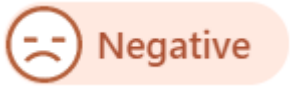
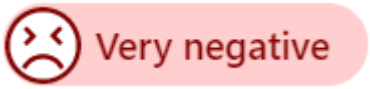
Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Note**
>
> Supervisor and agent sentiment notifications are not available in Omnichannel for Customer Service on Unified Service Desk.

Sentiment analysis enables agents and supervisors to understand real-time and historical customer sentiment across channels to improve customer service. Omnichannel for Customer Service uses natural language processing (NLP) and machine learning (ML) algorithms to understand customer sentiments.

Sentiment intensity indicators are displayed based on the previous six customer messages received in a conversation. Sentiment intensity is scored in one of seven gradients: three positive, three negative, and one neutral.

Sentiment	Icon
Very positive	
Positive	
Slightly positive	
Neutral	
Slightly negative	

Sentiment	Icon
Negative	
Very negative	

Omnichannel for Customer Service sentiment analysis supports multiple languages. Using Microsoft Azure Text Translator API, conversations in more than 40 languages now receive sentiment scores.

> ⓘ **Note**
>
> - Non-English conversations are translated to English, then scored.
> - Unsupported languages don't receive a sentiment score.
> - If profanity is detected in English, the sentiment shows as Negative or Very negative.

To learn more, see Explore Text Translator API.

Personas

The multi-language sentiment feature (preview) supports the following personas: administrator, supervisor (team lead), and agent.

- If you're an administrator:
  - You can configure sentiment for English only and non-English languages.

    > ⓘ **Note**
    >
    > Sentiment is enabled in Omnichannel for Customer Service by default.

- If you're a supervisor (team lead):
  - You can track agents' performance and engage in real time to continuously improve the support quality.

    Example: Identifying negative sentiment events, including English profanity, in conversations between agents and customers.

    - When you identify negative sentiment, you can provide timely inputs to help an agent resolve an issue.

      Example: Monitor and join the conversation.

    - You can identify which chat and text sessions are going well, and which might require monitoring.

- If you're an agent:

    - You want to know customers' sentiments in real time and see customer satisfaction levels instantly as you communicate.

    - You can be responsible for handling multiple customer engagements at any given time.

    - You can engage directly with the customer to solve the customer's issue.

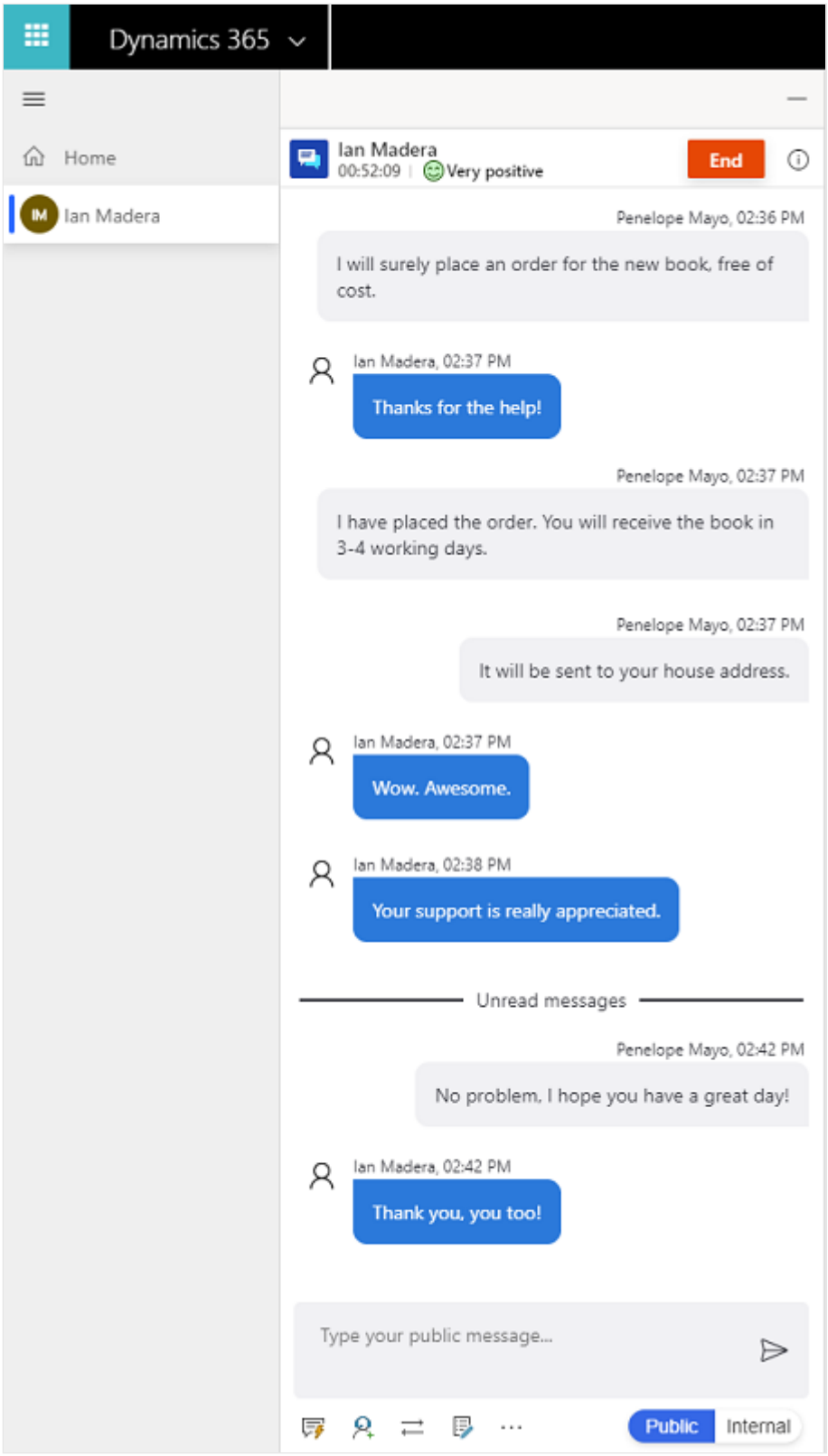
    - You can use analysis of customer sentiment to understand the severity of the problem, and take action.

Sentiment intensity indicators

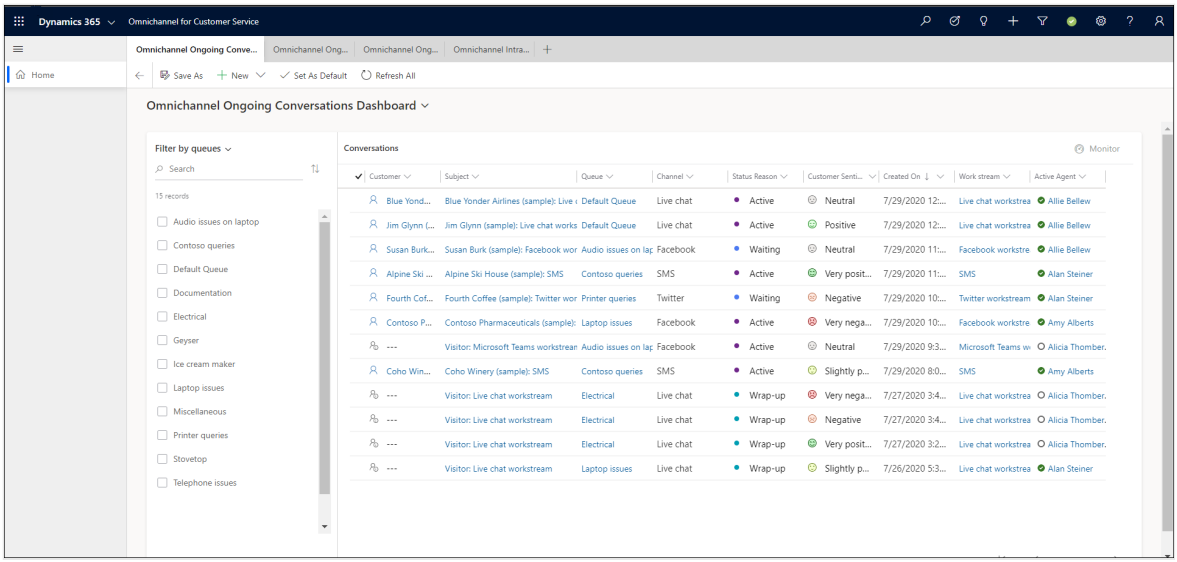
Omnichannel for Customer Service sentiment intensity indicators are an automatic and unbiased measurement of a customer's satisfaction level in real time. These indicators show agents and supervisors how a conversation is trending, and give supervisors a real-time gauge they can use to decide when they need to step in and assist.

- For agents:

  Sentiment intensity indicators at the top of the communication panel help you understand the customer’s sentiment.



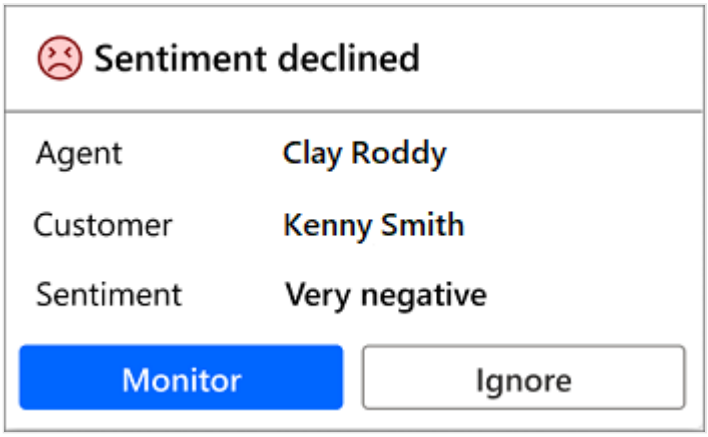
- For supervisors:
  - Sentiment intensity indicators identify ongoing chat sessions that need your attention, so that you can better assess and apply your time where it's most valuable.
  - Using sentiment intensity indicators on the Omnichannel Ongoing Conversations dashboard allows you to easily identify ongoing customer support chat sessions that aren't going well.



Low sentiment notification alert

While an agent is communicating with the customer, and if the customer's sentiment decreases to or below a threshold level, you will get a notification. The notification displays the following details:

- Agent name
- Customer
- Sentiment
- Monitor button
- Ignore button



You can select the **Monitor** button to see the **Active Conversation** and the communication panel. If the agent requires help, you can join the conversation.

For example:

Administrator has set the threshold value as **Very negative**. When the customer's sentiment reaches **Very negative** or any other sentiment value below the threshold value, the notification is displayed to you.

Multi-language sentiment limitations

Sentiment analysis relies on the initial customer messages in any conversation to detect the language of the conversation.

Expect the following system behavior:

- If a customer's initial messages are detected as English, the system assumes that subsequent messages will be in English as well. If your customer switches away from English after these initial messages, the system doesn't perform language re-detection. In this situation, you'll most often see a neutral sentiment score throughout the rest of the non-English conversation.
- If a customer's initial messages are detected as non-English, the system performs re-detection and scoring for subsequent messages. If any following message is detected as non-English, its subsequent message will be re-detected and scored according to its detected language.

Requirements

Your environment must have the latest version of Omnichannel for Customer Service. To learn more, see Upgrade Omnichannel for Customer Service.

Install and configure

After you've signed up, see step 4 of Enable sentiment analysis to configure sentiment analysis.

Policy notice

This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using this feature, and any associated feature or service in compliance with all applicable laws, including laws

relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

See also

Enable sentiment analysis
Monitor real-time customer sentiment
Monitor conversations

Introduction to intraday supervisor experiences

Article • 05/11/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Note**
>
> Intraday insights reports for Omnichannel for Customer Service are deprecated as of May 1, 2023. We recommend that you use **real-time analytics reports**, our latest analytics capability, which provide real-time information about the health and key performance indicators of your organization. For more information on the deprecation, go to **Intraday insights for Omnichannel for customer service are deprecated**.

> **Important**
>
> This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to inform their agents that their communications with end users may be monitored, recorded, or stored.

Customer service managers or supervisors are responsible for managing the agents who work with customers to resolve queries every day through various service channels.

Omnichannel for Dynamics 365 Customer Service provides dashboards that help supervisors keep track of the work that their agents do. As a supervisor, you can use these dashboards to perform these tasks:

- Monitor key performance indicators (KPIs)
- Monitor quality and workload of agent
- Monitor unassigned workload
- Manage agent and customer escalations

As a supervisor, you see the following tabs when you open the Omnichannel for Customer Service app:

- **My dashboard**: This tab provides information about the conversations that you're directly connected and engaged with customers as an agent, such as your ongoing conversations, items that are available for you to pick, and closed conversations. To learn more, see Introduction to the agent interface.
- **Omnichannel intraday insights dashboard**: This tab provides an overview of information about the health and KPIs of agents in your organization. The information in this dashboard is displayed based on the last 24 hours conversations. To learn more, see Omnichannel intraday insights dashboard. If you're unable to view the dashboards, contact your system administrator. More information: Configure to view intraday insights dashboard. The intraday insights reports are available only in the English language, out of the box. You'll need to customize the reports to make them available in a language of your choice.

  This tab also displays all the reports and dashboards configured in the corresponding Power BI workspace.
- **Ongoing Conversations dashboard**: This tab provides information about the conversations that agents are handling and are in active, open, wrap up, and waiting status reason. To learn more, see Ongoing Conversations dashboard.

Videos

Overview of supervisor experience in Omnichannel for Customer Service

To view more videos on Omnichannel for Customer Service, see Videos.

See also

Configure to view intraday insights dashboard
View and understand Omnichannel intraday insights dashboard
View and understand Ongoing Conversations dashboard
Monitor and assign conversations

View and understand Omnichannel intraday insights dashboards

Article • 05/11/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Note**
>
> Intraday insights reports for Omnichannel for Customer Service are deprecated as of May 1, 2023. We recommend that you use **real-time analytics reports**, our latest analytics capability, which provide real-time information about the health and key performance indicators of your organization. For more information on the deprecation, go to **Intraday insights for Omnichannel for customer service are deprecated**.

Introduction

The **Omnichannel intraday insights** dashboards provide information about the health and key performance indicators (KPIs) for your organization. Omnichannel intraday insights consists of the following reports.

- IntradayMonitoring
- Conversation insights
- Agents insights

The information displayed in these reports is based on the conversations that were started or closed within the last 24 hours. The report fetches the latest data and is generated in real time when a supervisor accesses it. If the report in a customer configured workspace is kept open, it's automatically refreshed after 15 minutes. In a pre-configured Power BI workspace, the report auto refreshes after every 5 minutes.

> **Important**

- The intraday insights reports are available only in the English language, out of the box. You'll need to customize the reports to make them available in a language of your choice.
- In a BI workspace that's custom configured, you can perform the following customizations for the out-of-the-box reports:
  - Change visualizations for KPIs displayed on the report
  - Add visualizations for existing measures, KPIs, or fields to the report
- To help ensure that the most accurate and up-to-date data is displayed on the dashboard, be sure to follow **best practices for using Omnichannel for Customer Service**.

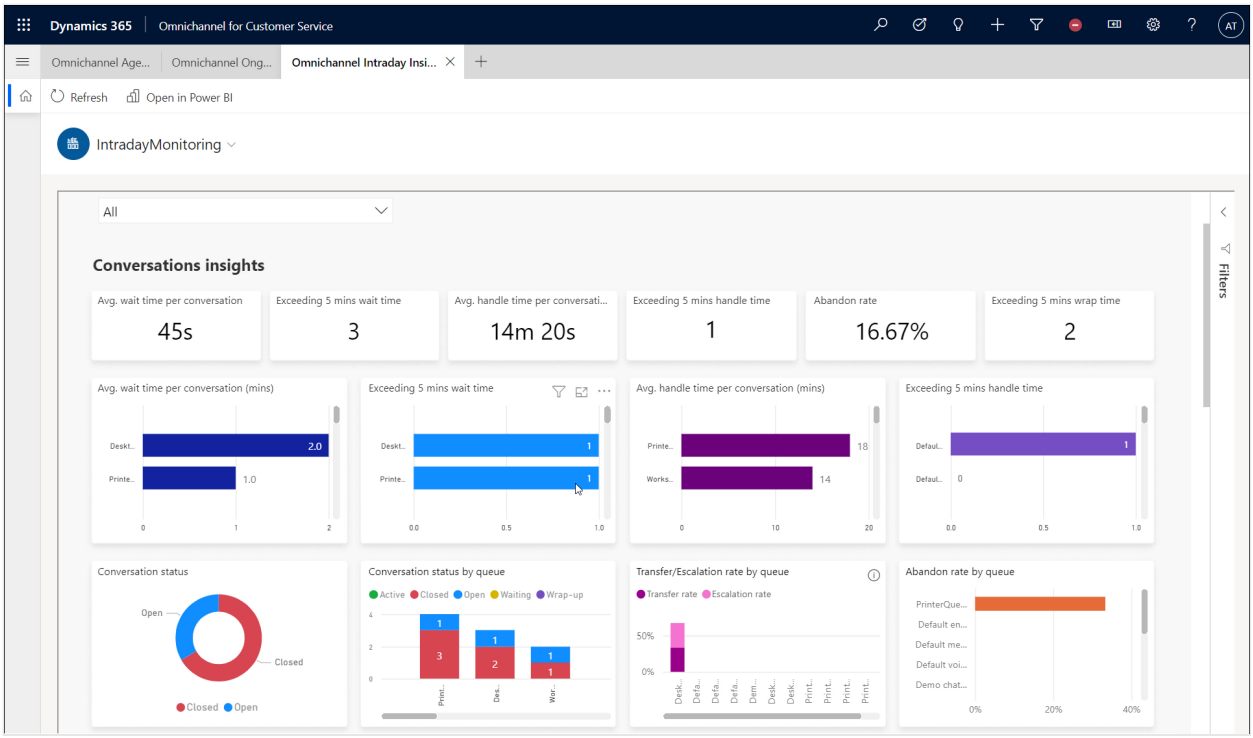
The IntradayMonitoring report

The IntradayMonitoring report deals with the overall contact center health and has relevant metrics to help understand it. This report contains two sections:

- The Conversation insights section provides metrics on the customer side, such as Customers waiting in queue and wait times.
- The Agent insights section contains metrics pertaining to agents such as agents logged in and handle times.

Conversations insights

The **Conversations insights** section provides metrics from a customer standpoint. A sample view of the metrics in **Conversations insights** is as follows.



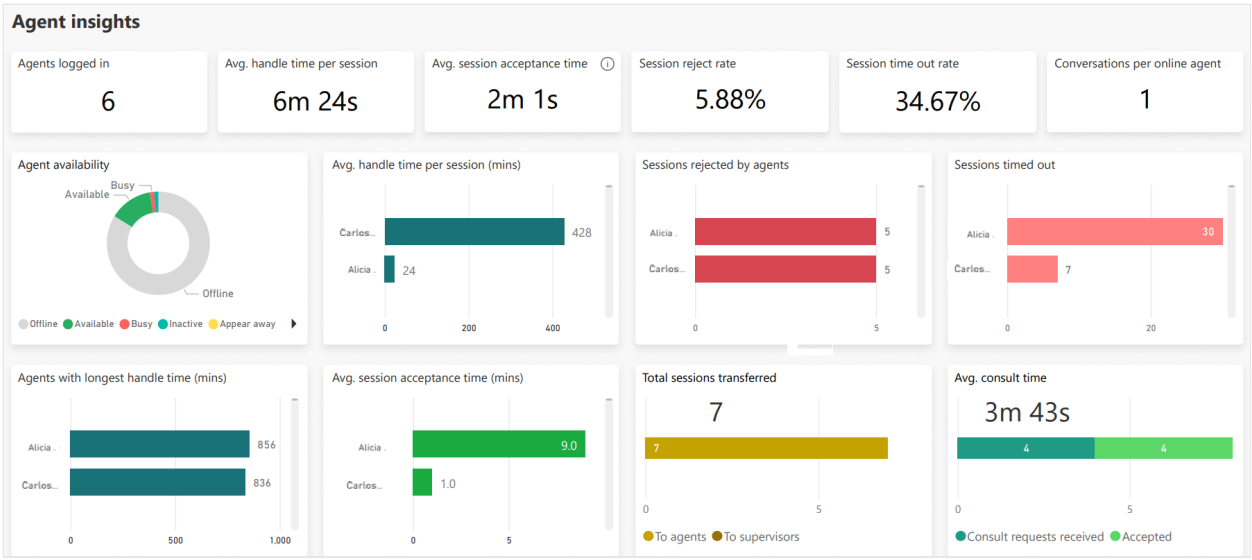
The KPIs for conversations in the IntradayMonitoring report are as follows.

Metric	Description	Availability
Avg. wait time per conversation	For a conversation, wait time is defined as the cumulative wait time of its individual sessions. This KPI is calculated as an average that considers only closed conversations. Session wait time is defined as the elapsed time between the creation of a session until the time an agent accepts it. If the agent rejects the chat or lets the notification time out, the amount of time it took for the agent to reject the chat or timeout is added and the time it takes for the subsequent session to be accepted by the agent is factored into the wait time. The average wait time is computed for only closed conversations and is also displayed on a per-queue basis. Only the conversations that are directly handled by an agent or escalated by a bot to an agent are considered. Conversations that are handled and closed by the bot are excluded.	Live chat, Digital messaging, Voice
Exceeding 5 mins wait time	The number of conversations that are open and have exceeded the threshold wait time of five minutes. This metric is also displayed on a per-queue basis.	Live chat, Digital messaging, Voice
Exceeding 5 mins wrap time	The number of conversations that are open and have exceeded the threshold wrap time of five minutes.	Live chat, Digital messaging, Voice

Metric	Description	Availability
Abandon rate	The percentage of conversations abandoned by customers before connecting to an agent. This metric is also displayed on a per-queue basis.	Live chat, Voice
Average handle time per conversation	The average handle time is calculated as the average of all the handle times of the sessions handled by the agent. The session handle time is the total duration the agent spent on the session when it is in focus in the session panel until an agent closes the session. The handle time is paused when the agent switches to another session and is resumed when the agent returns to the session. Average handle time is also displayed on a per-queue basis. Only the conversations that are directly handled by an agent or escalated by a bot to an agent are considered; conversations handled and closed by the bot are excluded. More information: Average handle time.	Live chat, Digital messaging
Exceeding 5 mins handle time	The number of active conversations that are exceeding the handle time threshold of five minutes. This metric is also displayed on a per-queue basis.	Live chat, Digital messaging, Voice
Conversation status	The distribution of the status of conversations across **Open**, **Active**, **Waiting**, **Wrap up**, and **Closed**.	Live chat, Digital messaging, Voice
Conversation status by queue	The distribution of the status of conversations across different queues.	Live chat, Digital messaging, Voice
Transfer/Escalation rate by queue	The transfer rate is the percentage of conversations in a queue that was transferred at least once. Escalation rate is the percentage of the conversations within a queue escalated to a supervisor.	Live chat, Digital messaging, Voice

Agent insights

The **Agent insights** section provides information about the health of the queues and the status of agents in a day. The agent insights section consolidates sessions across all channels. A sample view of the **Agent insights** section is as follows.



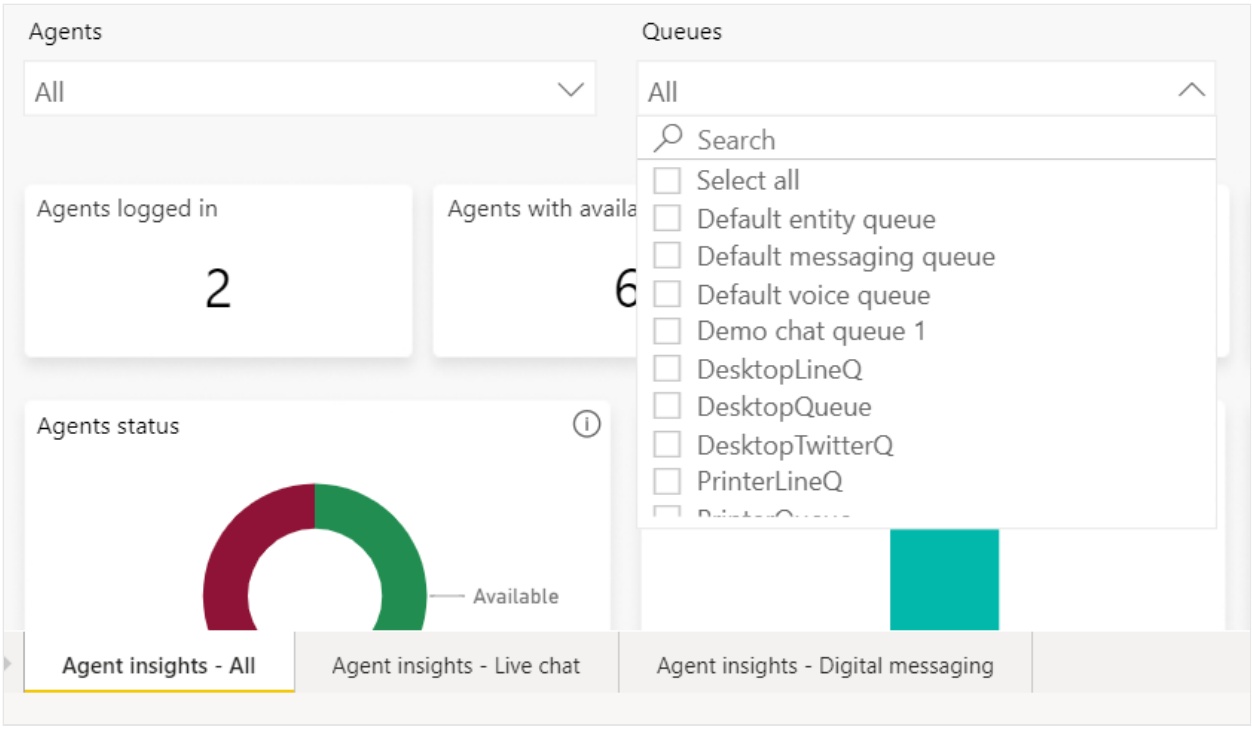
This section consists of the following performance indicators.

Metric	Description	Availability
Agents logged in	The number of agents who are signed in.	Live chat, Digital messaging, Voice
Average handle time per session	The average handle time is derived as the total session handle times by the number of sessions handled by the agents. The session handle time is the total duration an agent spent on the session when it is in focus in the session panel until an agent closes the session. The handle time is paused when the agent switches to another session and is resumed when the agent returns to the session.	Live chat, Digital messaging, Voice
Average session acceptance time	The average time an agent takes to accept an incoming conversation.	Live chat, Digital messaging, Voice
Session reject rate	The percentage of sessions rejected by the agents out of the total sessions assigned to them.	Live chat, Digital messaging, Voice
Session time out rate	The rate of sessions that were timed out	Live chat, Digital messaging, Voice
Sessions rejected by agents	The percentage of sessions rejected out of the total sessions assigned per agent.	Live chat, Digital messaging, Voice

Metric	Description	Availability
Sessions timed out	The rate of sessions that were timed out per agent.	Live chat, Digital messaging, Voice
Conversations per online agent	The number of conversations that are handled by each agent.	Live chat, Digital messaging, Voice
Agent availability	The distribution of agents presence.	Live chat, Digital messaging, Voice
Agents with longest handle time	The number of agents with the longest time to accept a conversation and resolve it.	Live chat, Digital messaging, Voice
Total sessions transferred	The number of sessions that were transferred to other agents or supervisors.	Live chat, Digital messaging, Voice
Average consult time	The average time spent by agents consulting with other agents or supervisors.	Live chat, Digital messaging, Voice

View and filter reports

You can filter information by selecting the queues that have been defined for your organization. From the **Omnichannel queues** dropdown list, select the queues you want, and the information will be filtered according to your selection. This helps you quickly analyze the KPIs and take any necessary steps to improve outcomes.



Average handle time

The average handle time is calculated as the average of all the handle times of the sessions handled by the agent. The session handle time is the total duration the agent spent on the session when it is in focus in the session panel until an agent closes the session. The handle time is paused when the agent switches to another session and is resumed when the agent returns to the session. This includes the time the agent takes to wrap up the conversation. When an agent concurrently handles multiple customers and switches sessions, the active time for the previous session is paused and the active time for the current session resumes.

The conversations handled by bots and closed by bots aren't considered in the calculation of the average handle time.

If the agent spends time providing consultation, it's included in the agent's average handle time. Similarly, for supervisors, the monitor time is included in the supervisor's average handle time.

When a conversation is transferred, the app calculates the handle time for the conversation by summing up the active time spent by all agents who are involved.

Average handle time is accurately calculated if you ensure the following:

- Agents close the sessions by selecting the **Close** button at the end of their shift. More information: Conversation in waiting status.
- Agents don't change the computer time.

- Agents don't use incognito mode in Google Chrome or private browsing in Microsoft Edge.

When an agent steps away from the desk during an ongoing session and doesn't interact with the customer, the system counts this time as active and calculates a higher value for the handle time. For a more realistic report of the active time that agents spend in the session, you can configure the idle time threshold. If no agent activity is detected after the idle time threshold is reached, the handle time computation is paused. The computation resumes if any mouse, touch, or keyboard activity is detected. By default, the idle time threshold isn't enabled out of the box. More information: Set the idle time threshold.

Saved views for Intraday reports

You can save the filters that you used for the reports as bookmarks. The bookmarks allow you to access the filters easily and repeatedly, without having to apply the filters every time. You can switch between the multiple bookmarks when you're managing different reports and teams. The saved views allow you to save the queues and agents pertaining to different teams and lets you switch between the filters to view the metrics for each team.

You can create personal bookmarks that are visible only to you. Bookmarks that are created by Power BI administrators can be shared with all users in a read-only mode.

More information:

- Create bookmarks in Power BI Desktop to share insights and build stories
- Create personal bookmarks

View reports in different time zones

Use the Timezone option available in the reports to view the date and time information according to the time zone that you specify. You must save the changes to view the report in the selected time zone the next time you access it. For a customized intraday insights report, the app automatically saves the selected time zone after a minute.

You can save your preferred time zone settings for reports as bookmarks. The bookmarks allow you to switch between reports in various time zones, without having to set the time zone.

Slice metrics by time

The **Duration** option that's available in all reports lets you filter the report details. The filter helps you look at the metrics for the shift the supervisor is handling out of the entire 24 hours duration. The filter lets you report the data within the last four, eight, or 12 hours duration or apply a custom value as well. The metrics within the reports are calculated based on the conversations created in the selected time duration.

> **Note**
>
> When you use the **Duration** filter, irrespective of the **Time zone** setting, the report is always displayed in the UTC time zone. This is due to a Power BI limitation. More information: **Power BI Considerations and limitations**.

Let's look at an example to understand the data refresh of the reports.

The following conversations were started and closed on day 1:

- Conversation 1: closed at 9:30 AM
- Conversation 2: closed at 10:14 AM
- Conversation 3: started on 11:00 PM
- Conversation 3: closed at 11:15 PM

If the supervisor accesses the report on day 2 at 10:00 AM and doesn't use the **Duration** filter, the report fetches the data corresponding to conversations 2 and 3. Conversation 1 isn't displayed, because it was closed 24.5 hours prior to the time the report is accessed. When the report refreshes automatically at 10:15 AM, the data corresponding to only conversation 3 is displayed on the report.

If you access the report on day 2 at 10:00 AM and set the **Duration** to 12 hours, the report only displays the data corresponding to conversation 3.

See also

Introduction to intraday insights dashboard
View and understand the Agents insights report
View and understand the Conversation insights report
View and understand Ongoing Conversations dashboard
Analyze your sales team's behavior on customer calls

View and understand the Agents insights report in Omnichannel intraday insights

Article • 07/11/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Note**
>
> Intraday insights reports for Omnichannel for Customer Service are deprecated as of May 1, 2023. We recommend that you use **real-time analytics reports**, our latest analytics capability, which provide real-time information about the health and key performance indicators of your organization. For more information on the deprecation, go to **Intraday insights for Omnichannel for customer service are deprecated**.

Introduction

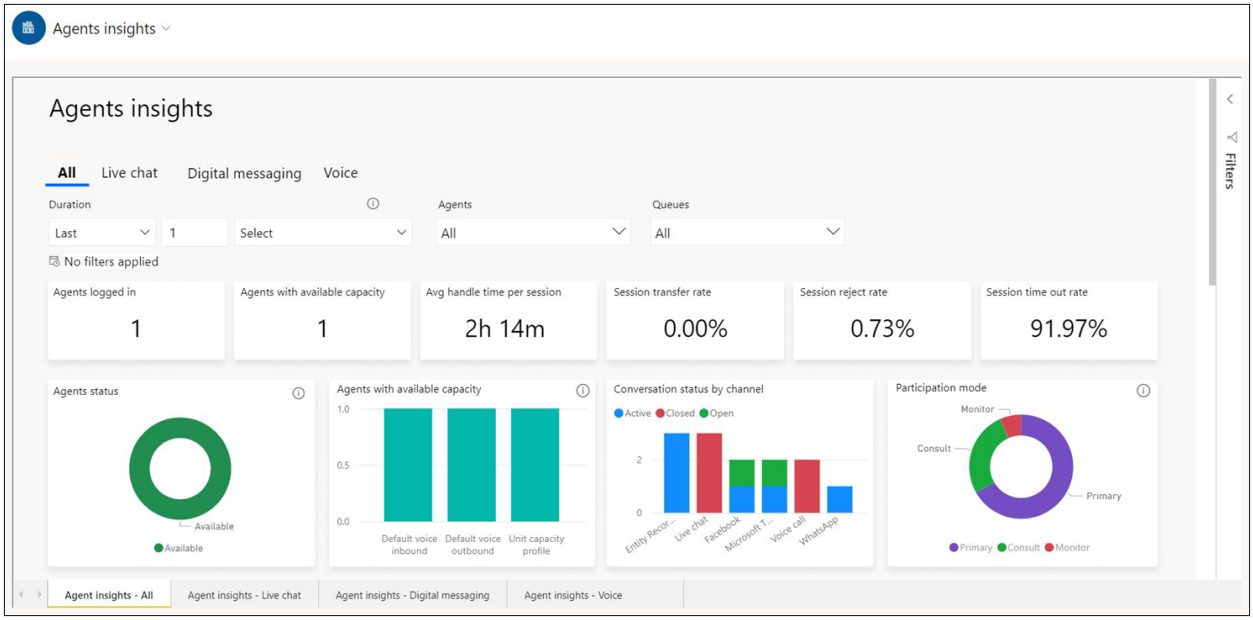
The Omnichannel intraday insights dashboard contains the Agents insights report that helps provide an overview of agent performance.

The Agents insights report

The **Agents insights** report consists of metrics from an agent's standpoint. The report shows all-up agent metrics across all channels or channel-wise agent performance. Supervisors can select the **All** tab to view agent performance across all channels, or select the **Live chat**, **Digital messaging**, or **Voice** tabs to view the agent performance for the corresponding channel.

The Digital messaging report includes metrics from the social channels, SMS, Microsoft Teams, entity records, and custom messaging channels.

You can view specific insights about the performance of individual agents or groups of agents, such as their availability, average length of time in conversations, and average response time per session.



The agents insights report consists of the following metrics.

Metric	Description	Availability
Agents logged in	The number of agents who are signed in.	Live chat, Digital messaging, Voice
Agents with available capacity	The number of signed-in agents who can accept incoming conversation requests as well as their available capacity across all capacity profiles. Unit-based capacity is accounted against the unit capacity profile.	Live chat, Digital messaging, Voice
Average handle time per session	The average handle time is derived as the total session handle times by the number of sessions handled by the agents. The session handle time is the total duration an agent spent on the session when it is in focus in the session panel until an agent closes the session. The handle time is paused when the	Live chat, Digital messaging, Voice

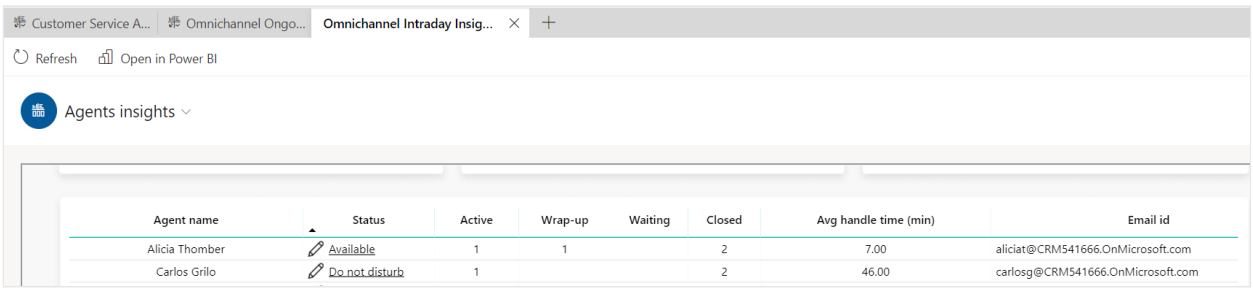
Metric	Description	Availability
	agent switches to another session and is resumed when the agent returns to the session.	
Session reject rate	The percentage of sessions rejected by the agents out of the total sessions assigned to them.	Live chat, Digital messaging, Voice
Session time out rate	The percentage of sessions that were timed out, out of the total sessions assigned.	Live chat, Digital messaging, Voice
Session transfer rate	The percentage of sessions that were transferred to another agent or queue.	Live chat, Digital messaging, Voice
Agent status	The presence status of an agent.	Live chat, Digital messaging, Voice
Chat status	Displays the number of chat conversations that are in the different statuses.	Live chat
Conversation status by channel	The distribution of the different conversations statuses across different channels.	Digital messaging
Call status	Displays the number of calls that are in the different statuses.	Voice
Participation mode	The distribution of the sessions across various participation types - Primary indicates the agent who's assigned the session, Consult indicates agents who are engaged in a consulting session and Monitor indicates an ongoing Supervisor's monitor session.	Live chat, Digital messaging, Voice
Transfer rate by agent	The percentage of sessions transferred by the agent to another agent or queue.	Live chat, Digital messaging, Voice
Transfer rate by queue	The percentage of sessions within a queue that were transferred to another agent or queue.	Live chat, Digital messaging, Voice
Consult acceptance	The percentage of consult requests accepted by an agent out of the total requests received.	Live chat, Digital

Metric	Description	Availability
Avg. talk time (min)	The average time an agent spent talking with a customer over a voice call.	Voice
Avg. hold time (min)	The average time an agent put a customer on hold over a voice call.	Voice

You can filter on a specific queue or set of queues to view more specific information about an agent or group of agents. You can also hover over an agent's name and a pop-up window will appear, showing details such as the agent's presence, current conversations, and the sentiments of those conversations, as well as an agent's available capacity across different capacity profiles. Unit-based capacity is accounted against Unit capacity profile.

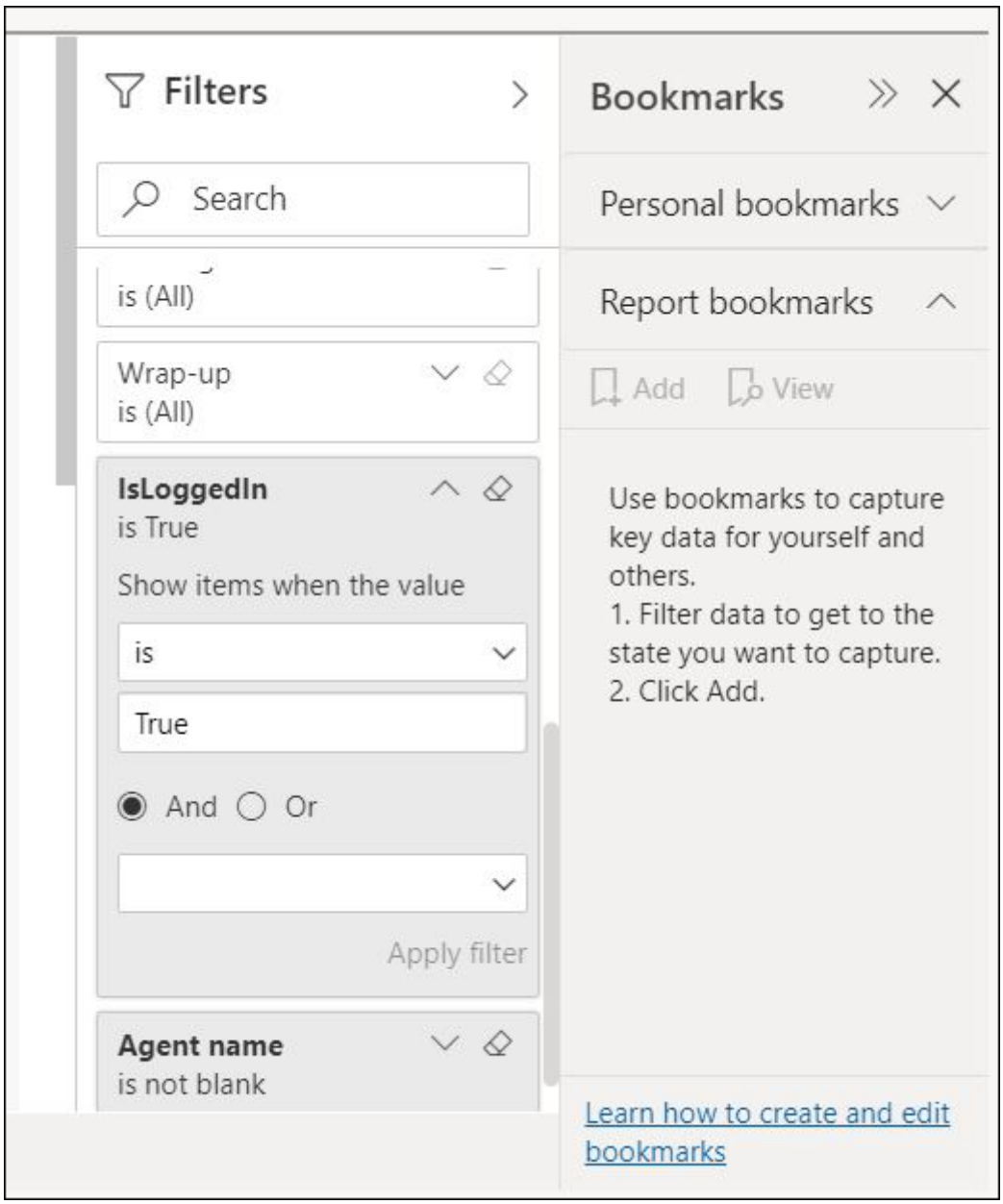
The table in the **Agent insights** report displays the following information.

Agent details	Description
Agent name	A list of the agent names for the queue.
Status	The current presence of the agent: **Available**, **Offline**, **Do not disturb**, or **Busy**.
Active	The number of conversations that are active.
Waiting	The total number of conversations waiting to be picked up by an agent.
Wrap-up	The total number of conversations in the wrap-up stage.
Closed	The number of conversations that are closed.
Avg handle time (min)	The average of an individual agent's handle time in minutes for all closed conversations that the agent is involved in. More information: Average handle time.
Email ID	The email address of the agent handling the conversation; the email address should be unique so that the agent filter works as expected.



You can use the filters pane on the right to see only the signed-in agents in the table. Do the following:

1. Select the agent table.
2. Select the filter pane, and set **IsLoggedIn** field to **True**.



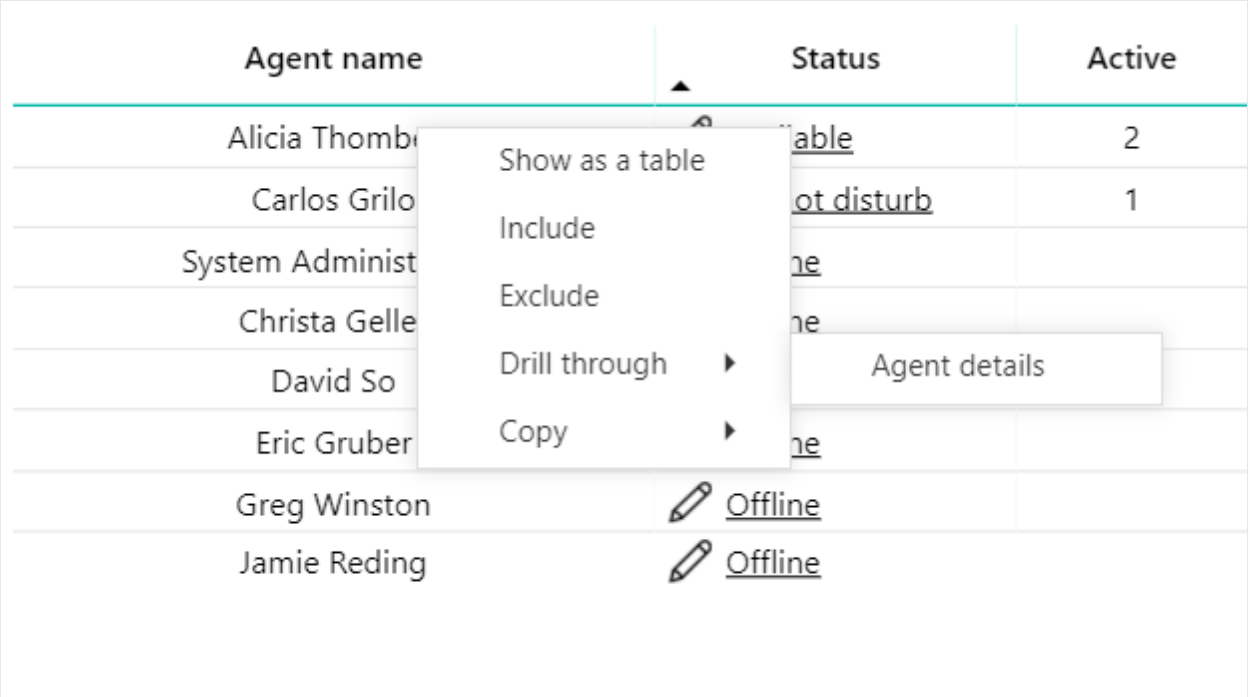
To get agent capacity information and monitor it, use the following entities to create a custom report or customize an existing report according to your business requirements.

- The agent status entity for the latest capacity profile and presence status of an agent.
- The status history entity for the history or audit trail of the presence and capacity profile changes for an agent.

Agent details

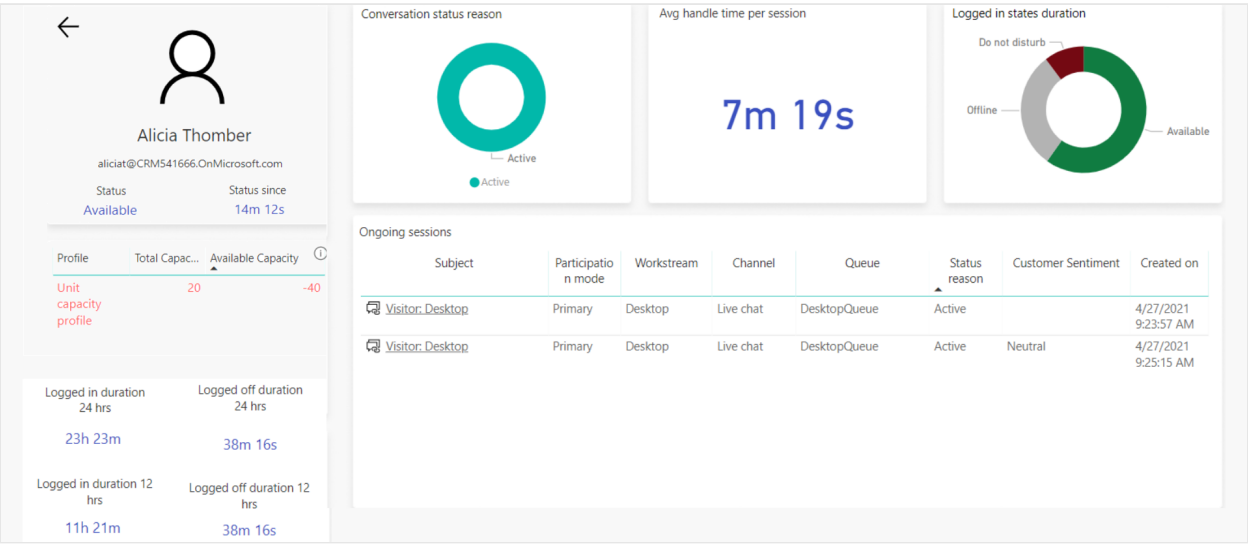
You can also view details about a specific agent by right-clicking the agent's name and then selecting **Drill through** > **Agent details** on the shortcut menu, as shown in the

following image.



> **Note**
>
> The **Drill through** feature isn't supported outside of Omnichannel for Customer Service.

Details about the agent are displayed as shown in the following image.



This section displays the following details.

Detail	Description
Profile	The capacity profiles that are assigned to an agent. If a profile is force assigned, it is displayed in red.
Total capacity	The total capacity as configured in the profile.
Available capacity	The current available capacity. Available capacity can be displayed as negative due to supervisor assigns.
Status	The agent's current presence : **Available**, **Offline**, **Do not disturb**, or **Busy**.
Status since	The amount of time that the agent's presence has been in its current state.
Logged in duration 24 hrs	The total duration for which the agent has been signed in during the past 24 hours.
Logged off duration 24 hrs	The total duration for which the agent has been signed out during the past 24 hours.
Logged in duration 12 hrs	The total duration for which the agent has been signed in during the past 12 hours.
Logged off duration 12 hrs	The total duration for which the agent has been signed out during the past 12 hours.
Queues	The queues that the agent is mapped to.
Skills	The skills that are assigned to the agent.
Conversation status reason	The status of the latest conversation between the agent and a customer.
Avg handle time per session	The average handle time per session is calculated as the average of all the handle times of the sessions handled by the agent. The session handle time is the total duration an agent spent on the session when it is in focus in the session panel until an agent closes the session. The handle time is paused when the agent switches to another session and is resumed when the agent returns to the session. This includes the time the agent takes to wrap up the conversation. More information: Average handle time.
Logged in states duration	The agent's presence when the agent is signed in.
Subject	For an identified customer, the customer's name is displayed with the subject. For unidentified customers, static text is displayed with the label **Visitor**. More

Detail	Description
	information: Automatically identify customers.
Participation mode	**Primary** indicates that the agent is engaged in a session. **Consult** means that the agent is engaged in a consulting session with another agent. **Monitor** means that this agent is monitoring the session.
Work stream	The work stream that the conversation is assigned to.
Channel	The channel that the conversation was created from.
Queue	The queue that the conversation is currently part of.
Status reason	The current conversation status.
Customer sentiment	The current sentiment.
Created on	The conversation creation time.
Capacity and status timeline	Every change in capacity or status is plotted on the timeline. Negative capacity is displayed if a supervisor assigns a conversation to an agent that's beyond the agent's available capacity.

Change agent status

You can select the **Status** field to modify the presence indicator for an agent. The agent has to be signed in for you to change the agent status.

See also

Introduction to intraday insights dashboard
Intraday insights dashboard
View and understand conversation insights
View and understand Ongoing Conversations dashboard
Seller details page for sales managers

View and understand the Conversation insights report in Omnichannel intraday insights

Article • 05/11/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Note**
>
> Intraday insights reports for Omnichannel for Customer Service are deprecated as of May 1, 2023. We recommend that you use **real-time analytics reports**, our latest analytics capability, which provide real-time information about the health and key performance indicators of your organization. For more information on the deprecation, go to **Intraday insights for Omnichannel for customer service are deprecated**.

Introduction

The Omnichannel intraday insights dashboard contains the Conversation insights report that helps provide an overview of the conversations across the different channels.

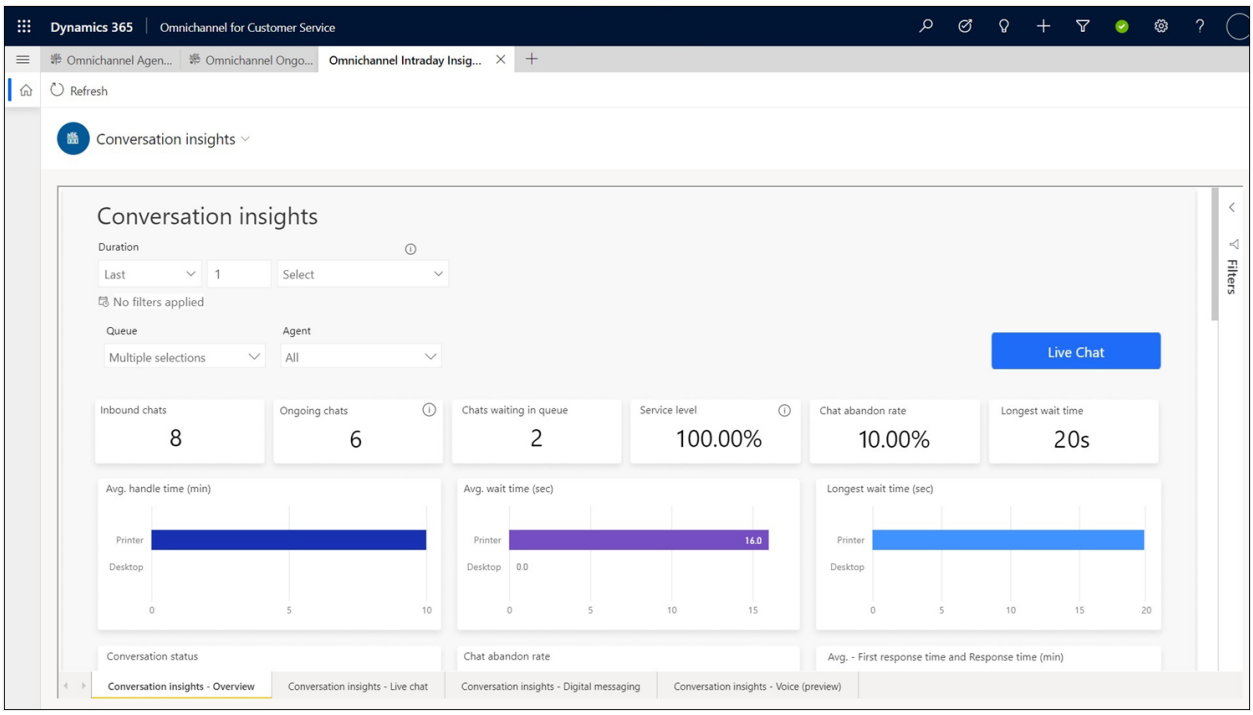
The Conversation insights report

The **Conversation insights** report is arranged in the following tabs:

- Conversation insights - Overview
- Conversation insights - Live chat
- Conversation insights - Digital messaging
- Conversation insights - Voice

The overview section provides the most important metrics across Live Chat, Digital messaging, and Voice. Supervisors can drill through to the detailed metrics for the respective channel type by selecting the Live chat, Digital Messaging, or Voice buttons.

The Digital messaging report includes metrics from the social channels, SMS, Microsoft Teams, entity records, and custom messaging channels.



The **Conversation insights** report displays the following metrics about conversations.

Metric	Description	Availability
Inbound chats/Inbound conversations/Inbound calls	The number of chat, conversations, or calls that were started, closed, within the last 24 hours by a bot or an agent.	Live chat, Digital messaging, Voice
Ongoing chats/Ongoing conversations/Ongoing calls	The number of chat, conversations, or calls by a bot or an agent in active, waiting, and wrap-up statuses.	Live chat, Digital messaging, Voice
Service level	The percentage of chats that were accepted by an agent within 30 seconds. The threshold of 30 seconds can be modified to suit your business needs. More information: Modify thresholds. Only the conversations that are directly handled by the agent or escalated by the bot to the agent are considered; conversations handled and closed by the bot are excluded.	Live chat
Chats waiting in queue/Conversations waiting in queue/Calls waiting in queue	The number of conversations that are waiting in the queue to be accepted by the bot or agent.	Live chat, Digital messaging, Voice

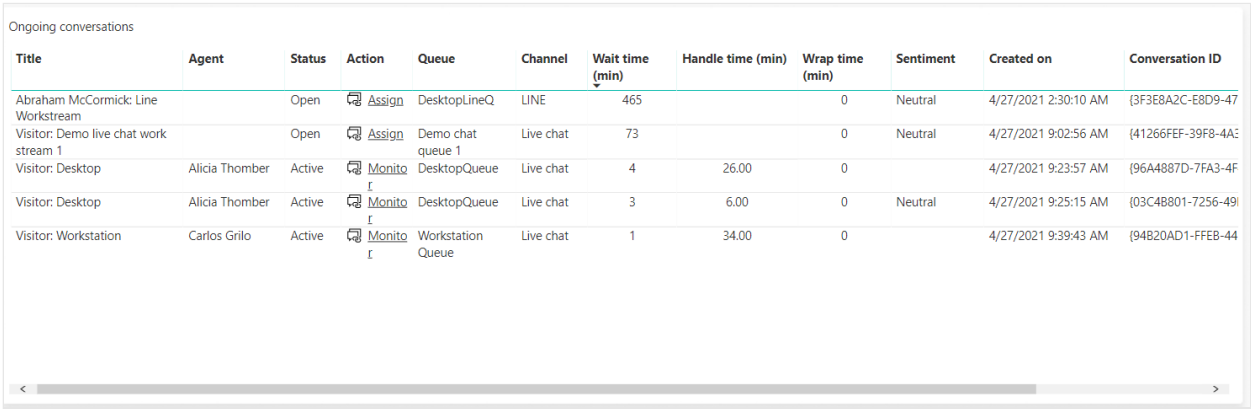
Metric	Description	Availability
Closed chats/Closed conversations/Closed calls	The number of conversations closed in the last 24 hours by the bot or agent.	Live chat, Digital messaging, Voice
Longest wait time	The longest time that an open conversation is waiting in queue to be accepted by an agent.	Live chat, Digital messaging, Voice
Average handle time	The average handle time is calculated as the average of all the handle times of the sessions handled by the agent. The session handle time is the total duration the agent spent on the session when it is in focus in the session panel until an agent closes the session. The handle time is paused when the agent switches to another session and is resumed when the agent returns to the session. More information: Average handle time. Only the conversations that are directly handled by an agent or escalated by a bot to an agent are considered; conversations handled and closed by the bot are excluded.	Live chat, Digital messaging, Voice
Average wait time (min)	For a conversation, wait time is defined as the cumulative wait time of its individual sessions. Session wait time is defined as the elapsed time between the creation of a session and the time that an agent accepts it. If the agent rejects the chat or lets the notification time out, the amount of time it took for the agent to reject the chat or timeout is added and the time it takes for the subsequent session to be accepted by the agent is factored into the wait time. The average wait time is computed for only closed conversations and is also displayed on a per-queue basis. Is derived as the total wait time by total number of conversations, excluding the abandoned ones. Only the conversations that are directly handled by an agent or escalated by a bot to an agent are considered; conversations handled and closed by the bot are excluded.	Live chat, Digital messaging
Average wrap time (min)	The average time taken to wrap up conversations. Is derived as the total wrap time by total number of conversations, excluding abandoned ones. Only the conversations that are directly handled by an agent or escalated by a bot to an agent are considered; conversations handled and closed by the bot are excluded.	Live chat, Digital messaging

Metric	Description	Availability
Conversation status	The distribution of the status of conversations across **Open**, **Active**, **Waiting**, **Wrap up**, and **Closed**.	Live chat, Digital messaging, Voice
Chat abandon rate/Call abandon rate	The percentage of conversations in which customers left before an agent accepted it. After escalation by a bot, when a customer leaves before an agent accepts it, it's also considered as abandoned. Is derived as the number of abandoned conversations or calls by number of chats or calls.	Live chat, Voice
Transfer rate by queue	The percentage of sessions within a queue that were transferred to another agent or queue. Is derived as the number of sessions transferred by total sessions. This includes any sessions created by a bot and escalated to an agent.	Live chat, Digital messaging
SLA - First response time	The percentage of conversations wherein the customer received the first response from the agent within 1 minute. The threshold of one minute can be modified to suit your business needs. See Modify thresholds. Only the conversations that are directly handled by an agent or escalated by a bot to an agent are considered; conversations handled and closed by the bot are excluded.	Available for only digital messaging channels; not available in Government Community Cloud (GCC).
SLA - Response time	The percentage of messages wherein the customer received a response within 1 minute from the agent. The threshold of one minute can be modified to suit your business needs. Only the conversations that are directly handled by an agent or escalated by a bot to an agent are considered; conversations handled and closed by the bot are excluded.	Available for only digital messaging channels; not available in GCC.
Avg - First response time (min)	The average time that a customer waited to receive the first response from agents. First response time is the difference between the first message from the customer and first response from the agent in a conversation, when there are multiple messages and responses exchanged between the customer and agent in quick succession. Is derived as the total first response time by the total number of conversations, excluding the abandoned ones. For a conversation escalated by the bot, the first response time is the difference between the agent's first response and escalation time.	Live chat, Digital messaging; not available in GCC.

Metric	Description	Availability
Avg - Response time (min)	The average time that a customer waited to receive responses from agents. Is derived as the total response time by the total number of such responses. Response time is the difference between the earliest message from the customer and the earliest response from the agent when there are multiple messages and responses exchanged between the customer and agent in quick succession. This excludes any responses from the bot to customer, and considers only the responses from the agent, excluding the first response, after escalation by the bot	Live chat, Digital messaging; not available in GCC.
Service level - Speed to answer	The percentage of voice calls that were answered within 30 seconds by the agent. The threshold of 30 seconds can be modified to suit your business needs. See Modify thresholds. Only the calls that are directly handled by an agent or escalated by the bot to agent are considered; calls handled and closed by the bot are excluded.	Voice
Avg. talk time (min)	The average time the agent spent talking with a customer over a voice call. Only the calls that are directly handled by the agent or escalated by the bot to agent are considered; calls handled and closed by the bot are excluded.	Voice
Avg. hold time (min)	The average time the agent put a customer on hold over a voice call. Is derived as the total hold time by total calls put on hold by the agent.	Voice
Avg. after call work time	The average time an agent took to wrap up a voice call. Is derived as the total after call work time by number of calls, excluding the abandoned ones. Only the calls that are directly handled by the agent or escalated by the bot to agent are considered; calls handled and closed by the bot are excluded.	Voice
Avg. speed to answer	The average time it took for a customer call to be answered. Is derived as the total time to accept by the number of calls accepted, excluding the abandoned ones. Only the calls that are directly handled by the agent or escalated by the bot to agent are considered; calls handled and closed by the bot are excluded.	Voice
Customer Sentiment	An automatic and unbiased measurement of satisfaction levels of the customer in real time. More information: Understand real-time customer sentiment	Voice

Ongoing and closed conversations

The **Ongoing conversations** table provides information about the status of the conversations that are not yet closed. The table also displays information about the channel through which the conversation came in, with the time and date that the conversation was picked up.


Ongoing conversations

Title	Agent	Status	Action	Queue	Channel	Wait time (min)	Handle time (min)	Wrap time (min)	Sentiment	Created on	Conversation ID
Abraham McCormick: Line Workstream		Open	Assign	DesktopLineQ	LINE	465		0	Neutral	4/27/2021 2:30:10 AM	{3F3E8A2C-E8D9-47
Visitor: Demo live chat work stream 1		Open	Assign	Demo chat queue 1	Live chat	73		0	Neutral	4/27/2021 9:02:56 AM	{41266FEF-39F8-4A3
Visitor: Desktop	Alicia Thomber	Active	Monitor	DesktopQueue	Live chat	4	26.00	0		4/27/2021 9:23:57 AM	{96A4887D-7FA3-4F
Visitor: Desktop	Alicia Thomber	Active	Monitor	DesktopQueue	Live chat	3	6.00	0	Neutral	4/27/2021 9:25:15 AM	{03C4B801-7256-49
Visitor: Workstation	Carlos Grilo	Active	Monitor	Workstation Queue	Live chat	1	34.00	0		4/27/2021 9:39:43 AM	{94B20AD1-FFEB-44

The **Ongoing conversations** table displays the following metrics based on the channels through which the conversations are being held.

Title	Description
Agent	Name of the agent
Status	The status of the conversation, that is, open, active, waiting, wrap up, and closed.
Action	The action that can be taken on the conversation, that is, assign, monitor, or view the conversation.
Queue	The name of the queue that the conversation is a part of.
Channel	The name of the channel that the conversation came through.
Workstream	The workstream that the conversation is a part of.
First response time (min)	After sending the message, the time the customer waited for the first response from the agent. Not available in GCC.
Avg. response time (min)	The average time the customer waited for the agent to respond to their messages. Not available in GCC.
Total response time (min)	The total time the customer waited for the agent to respond to their messages. Not available in GCC.
Transfers	The total number of transfers made if the conversation is routed to another agent.

Title	Description
Escalations	The total number of escalations made. It does not include escalation from the bot to agent.
Speed to answer (sec)	**For voice channel**: The time it took for a customer call to be answered.
Talk time (min)	**For voice channel**: The total time spent by the customer and agent talking on the voice call. It's the difference between the handle time and cumulative time in hold and after call work time.
Hold time (min)	**For voice channel**: The total time an agent has put a customer on hold.
After call work time (min)	**For voice channel**: The time spent by an agent in wrapping up a voice call.
Wait time (min)	For a conversation, wait time is defined as the cumulative wait time of its individual sessions. Session wait time is defined as the elapsed time between the creation of a session and the time that an agent accepts it.
Handle time (min)	Total time taken to accept and close the conversation.
Wrap time (min)	Total time in which the conversation was in the wrap stage.
Sentiment	An automatic and unbiased measurement of satisfaction levels of the customer in real time.
Created on	The date on which the conversation was created on. The date and time is displayed in the UTC time zone.
Conversation ID	The conversation's ID.

The **Closed conversations** table provides information related to all the conversations that have been closed.

You can also assign a conversation to an agent or route it to another queue. More information: Monitor and assign conversations.

Factors that affect response time

First response time is calculated as the difference between the first message from the customer and the first response from the agent in a conversation that might contain

more than one message or response.

Response time is the difference between the earliest message from the customer and the earliest response from the agent, excluding the first message and response from the customer and agent respectively.

The successive exchange of messages will not be counted towards the calculation of the first response time and response time.

For example, a customer sends a message "Hello" at 2:20 PM and another message "I have a problem" at 2:21 PM. The agent responds as "Hello, sorry for the inconvenience." at 2:22 PM and "What is the issue you are facing?" at 2:23 PM. The first response time will be the difference between 2:20 PM and 2:22 PM, which is two minutes. Then the customer sends a message "My coffee machine has stopped working" at 2:24 PM and another message "I checked everything" at 2:25 PM. The agent responds "Let me help you with that" at 2:27 PM and "Are you near the coffee machine now?" at 2:28 PM. The response time will be the difference between 2:24 PM and 2:27 PM, which is three minutes.

The first response time and response time is calculated by keeping different factors into account. If operating hours are defined on the queue, the wait period of the out-of-operating hours is not considered in the response time. For example, an organization's operating hours are from 9:00 AM to 5:00 PM. When a chat is initiated by a customer at 8:55 AM, and agent responds at 9:03 AM. The response time will be the difference between 9:00 AM and 9:03 AM, which is three minutes. The metric doesn't consider the five minutes that are outside of the operating hours.

If a conversation is transferred from one queue to another, the messages exchanged in the currently assigned queue and its operating hours are taken into account for calculating the response time.

If the operating hours of the queue are updated to a new schedule, the latest operating hours are considered in calculating the response time for messages exchanged post the change.

Modify thresholds

In a BI workspace that's custom configured, you can update the thresholds for the metrics that are displayed in the out-of-the-box reports. However, you can't modify the thresholds in a preconfigured BI workspace.

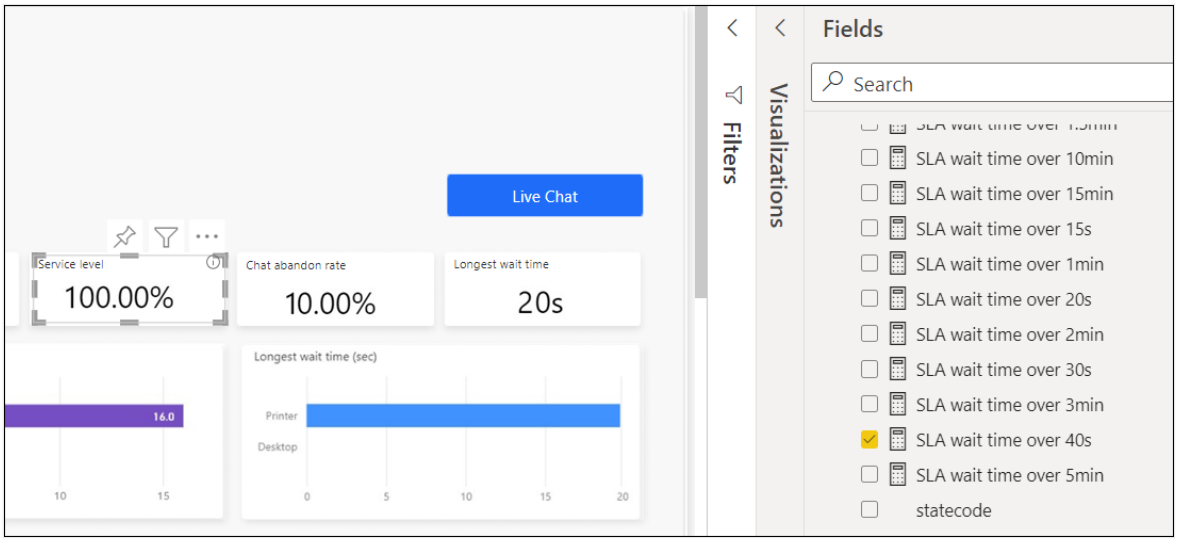
1. Open the report in Power BI.

2. On the report page, on the command menu, select **Edit**, and then select the KPI for which you want to change the threshold. The **Fields** pane appears on the right.

3. Expand the field on which the KPI is based, and scroll down to the fields that denote the time.

4. Clear the current selection, and then select the time field whose value meets your requirement.

   A sample change of threshold is as follows.



5. Save the changes.

See also

Introduction to intraday insights dashboard
Intraday insights dashboard
View and understand Agents insights report
View and understand Ongoing Conversations dashboard

Set the idle time threshold for average handle time

Article • 02/17/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

You can configure the idle time threshold to pause the handle time computation of an agent for an ongoing session when the agent is idle. More information: Average handle time.

How to set the idle time threshold

In the Omnichannel Administration app, select the **F12** key to open the command prompt, and then run the following:

JavaScript

```
let entityName = "msdyn_channelprovider"
let attributeName = "msdyn_channelurl"
let primaryAttributeName = "msdyn_channelproviderid"
let threshold = "60"

Xrm.WebApi.retrieveMultipleRecords(entityName, "").then((result) => {
    result.entities.forEach ((entity) => {
        console.log(entity);
        if(entity[attributeName].toString().indexOf("&idleTimeThreshold") ==
-1) {
            console.log("modify data");
        var data = {};
        data[attributeName] = entity[attributeName] + "&idleTimeThreshold="
+ threshold;
            Xrm.WebApi.updateRecord(entityName,
entity[primaryAttributeName], data).then((result) => {
            console.log(result);
                return Promise.resolve();
            }, (error) => {
            console.log(error);
                return Promise.reject();
            });
        }
```

```
    });
    return Promise.resolve(result.entities);
}, (error) => {
            console.log(error);
    return Promise.reject();
});
```

See also

View and understand Ongoing Conversations dashboard

View and understand Omnichannel Ongoing Conversations dashboard

Article • 07/07/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The **Omnichannel Ongoing Conversations** dashboard provides information on the conversations that are handled by agents and are in the active, open, wrap up, and waiting status in your organization. This dashboard provides a holistic view of the conversations with details, such as customer, agent assigned, subject, queue, and activity status. The data in the dashboard is auto refreshed in near real time.

Further, you can filter the conversations using the **Filter by queues** or **Filter by agents** option to create a personalized view of the queues or the group of agents you want to monitor or track. Select the queues or agents for which you want to view the conversations and then select **Apply**. The filter is applied, and conversations are displayed based on the selection. Select **Save** to set this filter as default and when you sign in to Omnichannel for Customer Service, you view conversations based on your saved filter.

> ⓘ **Note**
>
> - The **Ongoing Conversations dashboard** is view only and you can't perform any actions such as open, edit, or delete on this dashboard.
> - The status icon in the **Active Agent** column of the dashboard does not pertain to an agent's online presence in Omnichannel. The status is displayed based on your Microsoft Teams or Skype for Business integration settings with Microsoft Dynamics 365. The administrator can turn off the presence in the system settings for Dynamics 365.

View Omnichannel Ongoing Conversations dashboard

The **Omnichannel Ongoing Conversations** dashboard is available in:

- Unified Service Desk
- Omnichannel for Customer Service

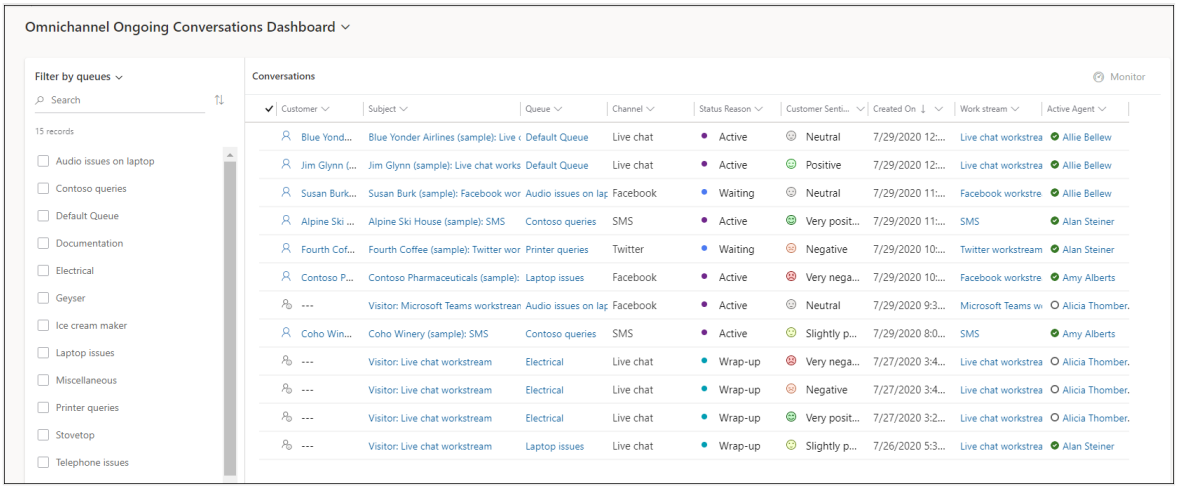
Unified Service Desk

1. Open the **Unified Service Desk** client application.
2. Sign in with your supervisor credentials.

   > **Note**
   >
   > To learn more, see **Sign in to Unified Service Desk – Omnichannel for Customer Service**.

3. Select the **Conversations** tab.

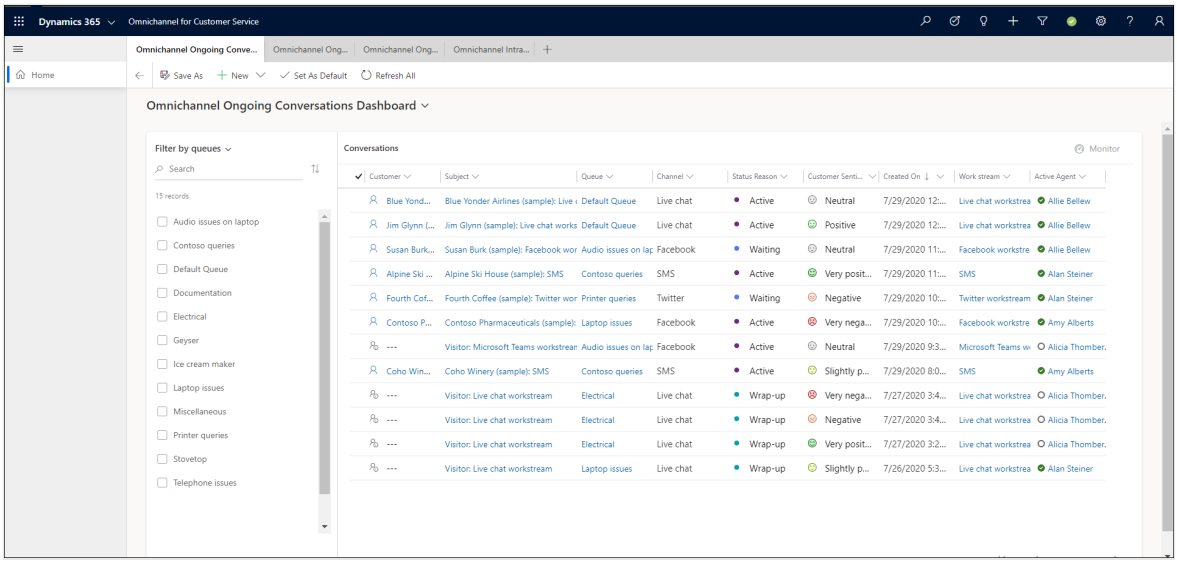
   The **Omnichannel Ongoing Conversations** dashboard displays the list of conversations that you and agents are handling.



Omnichannel for Customer Service

1. Go to *https://**YourOrganization**.dynamics.com/apps* and select **Omnichannel for Customer Service**.
2. Select the **Omnichannel Ongoing Conversations Dashboard** tab.

   The Omnichannel Ongoing Conversations dashboard displays the list of conversations that you and agents are handling.



See also

Provide access to Ongoing Conversations dashboard

Introduction to intraday insights dashboard

View and understand Omnichannel intraday insights dashboard

Use Omnichannel for Customer Service metrics

Article • 10/19/2023

This article describes the different metrics that help you analyze key performance indicators (KPIs) as you work with agents in your contact center. Use metrics to do a quantitative assessment of the data that is shown on the Omnichannel for Customer Service dashboards. Metrics can also help you make strategic decisions, and track and improve customer satisfaction.

Understand the Omnichannel analytics data model

Omnichannel for Customer Service provides an out-of-box data model that consists of fact and dimension tables.

- Facts, also known as metrics, represent the observational or event data that you want to analyze. Fact tables logically organize KPIs. For example, the `FactConversation` table has conversation metrics such as average handle time, whereas the `FactAgent` table has agent metrics.
- Dimensions represent the attributes of the facts. You can use them to break down the data for further analysis.

You can use facts and dimensions to visualize data according to your organizational requirements. For example, if you want to understand how average handle time varies by queue, you can filter the Average handle time fact by the Queue name dimension.

Fact tables are larger than dimension tables because numerous events, such as individual customer requests, occur in them. Dimension tables are typically smaller because you're limited to the number of items that you can filter on and group. For example, the number of queues is a limited set.

Understand the Omnichannel for Customer Service workflow

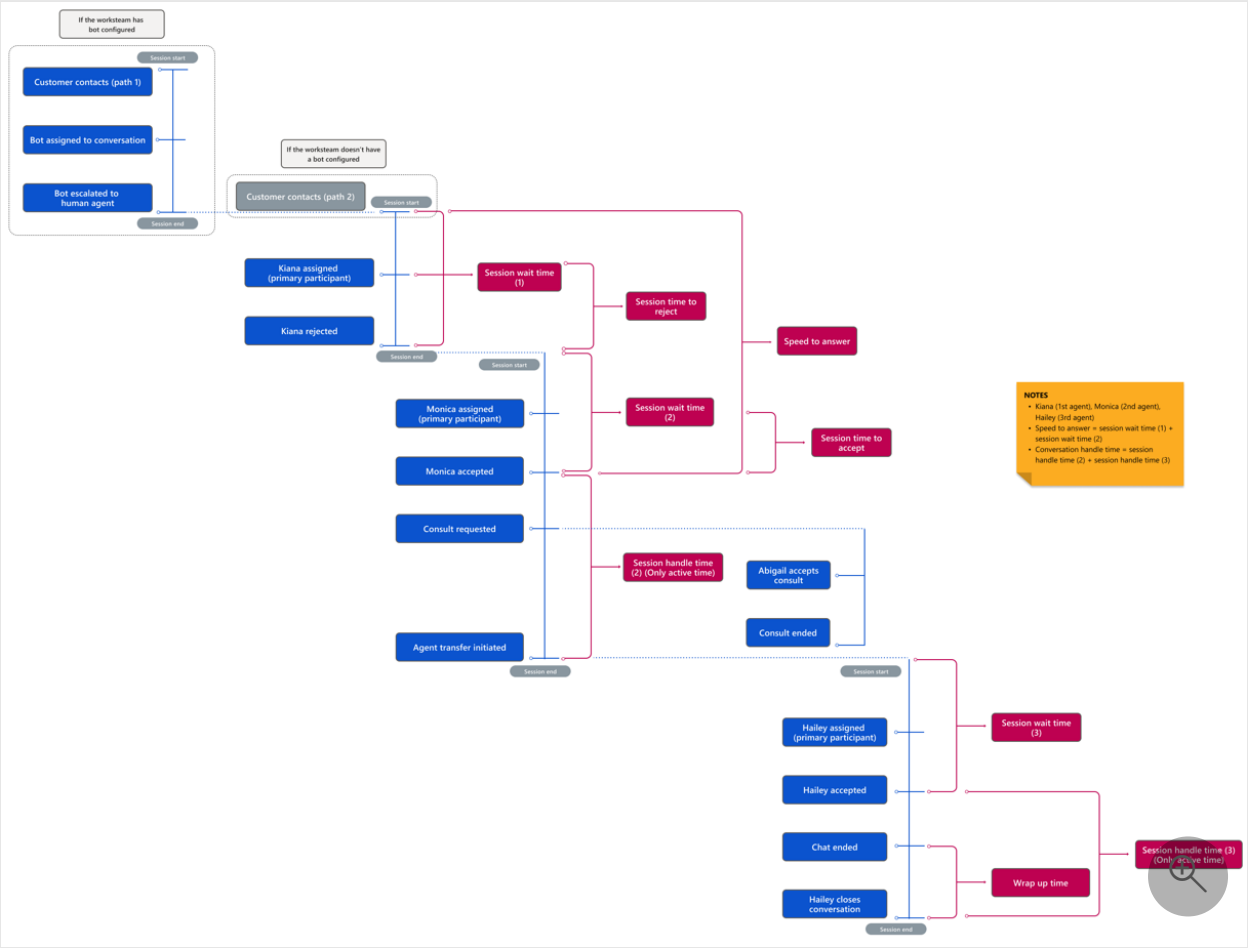
Here is a brief description of the workflow.

When a customer raises a request through a channel such as voice, messaging, or chat, a conversation is created. A conversation represents an entire end-to-end interaction

with a customer. A conversation can also be created when an agent calls a customer. A conversation typically originates in a workstream on a specific channel. It's then routed to a queue, based on your organizational rule settings. A conversation entity holds metrics about your customer's experience with the contact center. These metrics include the current status, wait time, handle time, and current customer sentiment.

A conversation can end during a single session, or it can extend to multiple sessions. A session is created when the system identifies an agent to work on a conversation. New sessions are created for different reasons. For example, a conversation might be transferred to a different queue, or an agent might reject a conversation request or let it time out. From this entity, you can get KPIs and metrics that describe queue performance and agent performance. Examples include the number of requests that landed in a queue, the number of requests that agents rejected, and agent handle time.

The workflow in the following diagram represents a single conversation where multiple sessions are created. The first session is created when the conversation is created and assigned to a bot. When the bot escalates the conversation to a human agent, the second session is created, and the first session is automatically closed. In the second session, the system identifies and assigns the best agent to work on the customer request. If that agent rejects the request, a new session is created, and the process of identifying another agent begins.



For every agent who is identified to work on a conversation and associated with the latest session, a session participant entry is created. A single session can have multiple participants. Every session has one primary participant: the agent who has the assigned work item. A session might then have many other participants who monitor the conversation or help with the consultation. Alternatively, the session might have no other participants. From this entity, you can get KPIs and metrics about consultations that agents provide and monitored conversations.

Dimensions

This section describes the different dimensions of the out-of-box omnichannel real-time analytics metrics.

For information about how you can use these metrics to customize the visual display of your reports, go to Customize visual display.

Skills

Skills that have been assigned to agents.

Proficiency

Agent's proficiency level for assigned skills.

Capacity profile name

This dimension represents the name of the capacity profile.

Conversation direction

This dimension applies only to voice conversations. It indicates whether the customer or an agent in the contact center initiated the conversation.

If a contact center agent initiates the conversation (and the customer receives it), it's considered outbound. If the customer initiates the conversation (and the contact center receives it), it's considered inbound.

Conversation status

This dimension represents the current state of a customer interaction. The following status values are available:

- **Open**: The conversation is currently awaiting agent assignment.
- **Active**: Either the conversation has had an agent assigned and is awaiting acceptance, or an agent is in contact with the customer.
- **Waiting**: The conversation is currently awaiting either a customer response or an agent response. This option applies to asynchronous conversation modes, such as messages.
- **Wrap-up**: The agent is performing post–customer interaction activities such as adding notes or updates to the case after the end of a customer conversation.
- **Closed**: The conversation is currently closed.

Queue name

This dimension represents the name of the queue.

Agent presence

This dimension represents the statuses that are available for agents. The out-of-box options include *Online*, *Away*, *Busy*, *Offline*, and *Do Not Disturb*. The status options that are available to you depend on your organization's configuration and include any other custom presence statuses that have been configured for your organization.

Date hour

This dimension represents the hour of the day in 24-hour format.

Time range

The following time-based filter options are available on real-time dashboards:

- **Today**: View all conversations that have begun since 12 AM in the selected time zone, in any state or province.
- **Last 24 hours**: View all conversations that have begun in the last 24 hours, in any state or province.
- **Include open conversations beyond 24 hours**: View all conversations that have begun in the last 24 hours, in any state or province. In addition, view all conversations that have begun in the last three days and that are still open.

Time zone

This dimension represents the time zone that is used to calculate and show metrics across the dashboards. The available options are standard time zones.

Agent name

This dimension represents the name of the omnichannel agent.

Agent participation mode

The following agent participation modes are available:

- **Primary**: Agent participation mode is *Primary*.
- **Consult**: Agent participation mode is *Consult*.
- **Monitor**: Supervisor participation mode is *Monitor*. This option applies only to users who have the Omnichannel supervisor role.

Workstream name

This dimension represents the name of the omnichannel workstream where the conversation originated.

Channel name

This dimension represents the name of the channel.

Metrics

Average consult time

This metric represents the average time agents spend helping other agents on consult requests. It's calculated by dividing the total time spent by agents on these requests by the total number of consult requests accepted. You can display the average consult time in seconds or in the hh:mm:ss format.

Related metrics

- **Consult time**: The time taken by agents to help other agents on consult requests. This metric can be viewed in seconds and in *hh:mm:ss* formats.

Consult requests accepted

This metric represents the total number of consult requests accepted by the agents.

Related metrics

- **Consult acceptance rate**: The rate at which agents accept consult requests. It's calculated by dividing the total number of consult requests that were accepted by the total number of agents.
- **Consults requested**: The total number of consult requests sent to agents.
- **Consult requested not accepted**: The total number of consult requests that weren't accepted by the agents. This includes rejected and timed-out requests.

Conversation first wait time

This metric is a measure of the time, in seconds, before a human agent responds to a customer's request. In other words, it represents the amount of time that the customer spends waiting for the first response from a human agent. Agent availability, a high volume of requests, and increased handle time are some factors that can affect customer wait time. A shorter wait time indicates that customers get faster issue resolution and have a better support experience.

If a bot or interactive voice response (IVR) handles the customer before it escalates the issue to a human agent, the calculation is based on the time between the point when the bot or IVR escalates the incoming conversation to a human agent and the point when the agent accepts the conversation. If the customer abandons the conversation, the calculation is based on the time between the point when the bot or IVR escalates the conversation to a human agent and the point when the customer disconnects the conversation.

If the customer reaches a human agent queue directly, the calculation is based on the time between the point when the customer creates the request and the point when a human agent accepts the conversation. If the customer abandons the conversation, the calculation is based on the time between the point when the customer creates the request and the point when the customer disconnects the conversation.

This metric is available in two formats: seconds and *hh:mm:ss*.

Related metrics

- **Average conversation first wait time**: This metric is calculated by dividing the total wait time for customers who are waiting in the queue by the total number of customers who were served.
- **Longest wait time**: This metric is a measure of the longest first wait time among incoming conversations that an agent hasn't yet accepted.
- **Conversations in queue**: This metric is a count of customer requests that are currently awaiting agent assistance, or conversations that have had an agent assigned but are awaiting agent acceptance.

For information about metrics that are related to the time that customers wait in individual queues if they are transferred from one agent to another, go to the Session wait time section.

Average speed to answer

This metric measures how quickly the customer service team responds to a customer's request. It's calculated by dividing the total wait time for customers who are waiting in the queue (after their issue has been escalated from a bot to a human agent) by the total number of customers who were served. Average speed to answer reflects the efficiency and availability of the agents. A lower average speed to answer indicates that customers can get their issues resolved more quickly and have a better experience with the service.

If a bot or IVR handles the customer before it escalates the issue to a human agent, the calculation is based on the time between the point when the bot or IVR escalates the incoming conversation to a human agent and the point when the agent accepts the conversation.

If the customer reaches a human agent queue directly, the calculation is based on the time between the point when the customer creates the request and the point when a human agent accepts the conversation.

This metric is available in two formats: seconds and *hh:mm:ss*.

Related metrics

- **Service level (10 seconds)**: This metric is a measure of the percentage of customer conversations where the speed to answer is less than or equal to 10 seconds.
- **Service level (20 seconds)**: This metric is a measure of the percentage of customer conversations where the speed to answer is less than or equal to 20 seconds.
- **Service level (30 seconds)**: This metric is a measure of the percentage of customer conversations where the speed to answer is less than or equal to 30 seconds.

- **Service level (40 seconds)**: This metric is a measure of the percentage of customer conversations where the speed to answer is less than or equal to 40 seconds.
- **Service level (60 seconds)**: This metric is a measure of the percentage of customer conversations where the speed to answer is less than or equal to 60 seconds.
- **Service level (120 seconds)**: This metric is a measure of the percentage of customer conversations where the speed to answer is less than or equal to 120 seconds.
- **Speed to answer**: This metric is a measure of the time before a customer request is accepted.

For information about metrics that are related to how quickly an agent accepts a request, go to the Average speed to answer section.

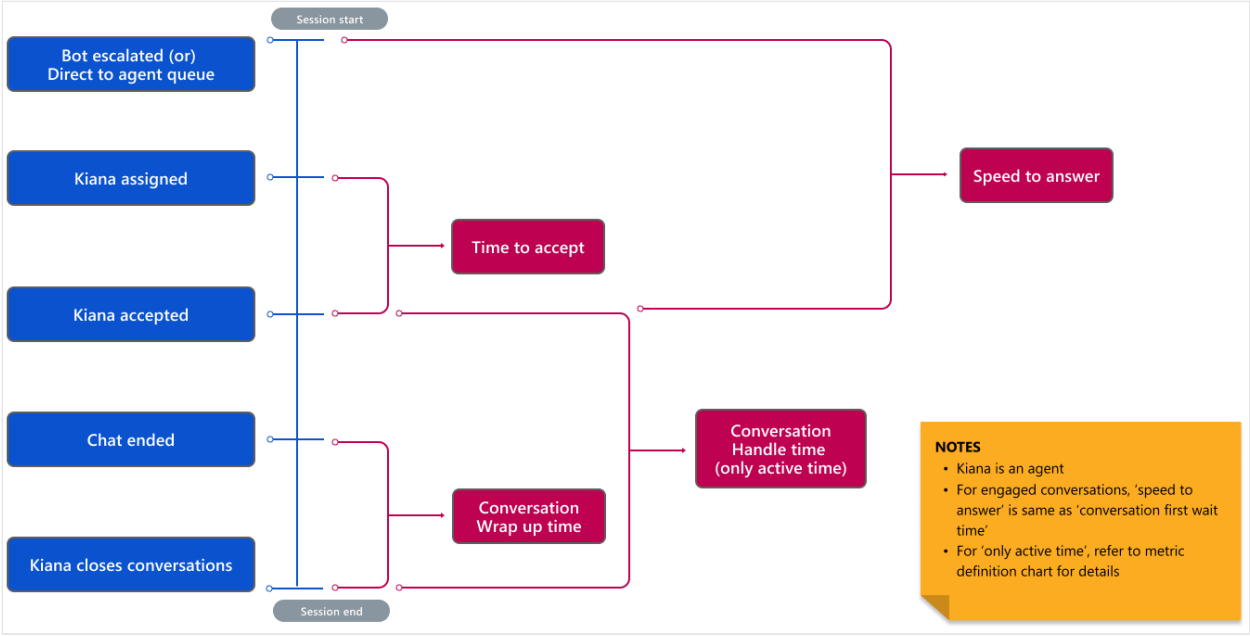
Conversation handle time

This metric is a measure of the time that human agents spend actively helping customers and resolving their issues. If multiple agents handle a conversation, the time that all the agents spend is aggregated. This metric also includes time that agents spend wrapping up the conversation after the customer disconnects, and the time that they spend updating notes or contact details. However, it excludes time that subject matter experts or other agents spend consulting with agents who are assigned to work on customer conversations.

An agent is considered actively working on a conversation if they have the conversation open in the Customer Service Workspace app. If an agent is handling multiple conversations, including conversations that they are currently wrapping up, only the time that the agent spends on the conversation on an open tab is counted toward that conversation's handle time.

A long average handle time might indicate that agents are taking too long to resolve customer issues, and that they need more training or support to help them work better. In addition, a long average handle time might suggest that customers aren't receiving the level of service or support that they need to resolve their issues. Therefore, it might lead to customer dissatisfaction.

This metric can be viewed in two formats: seconds and *hh:mm:ss*.



Related metric

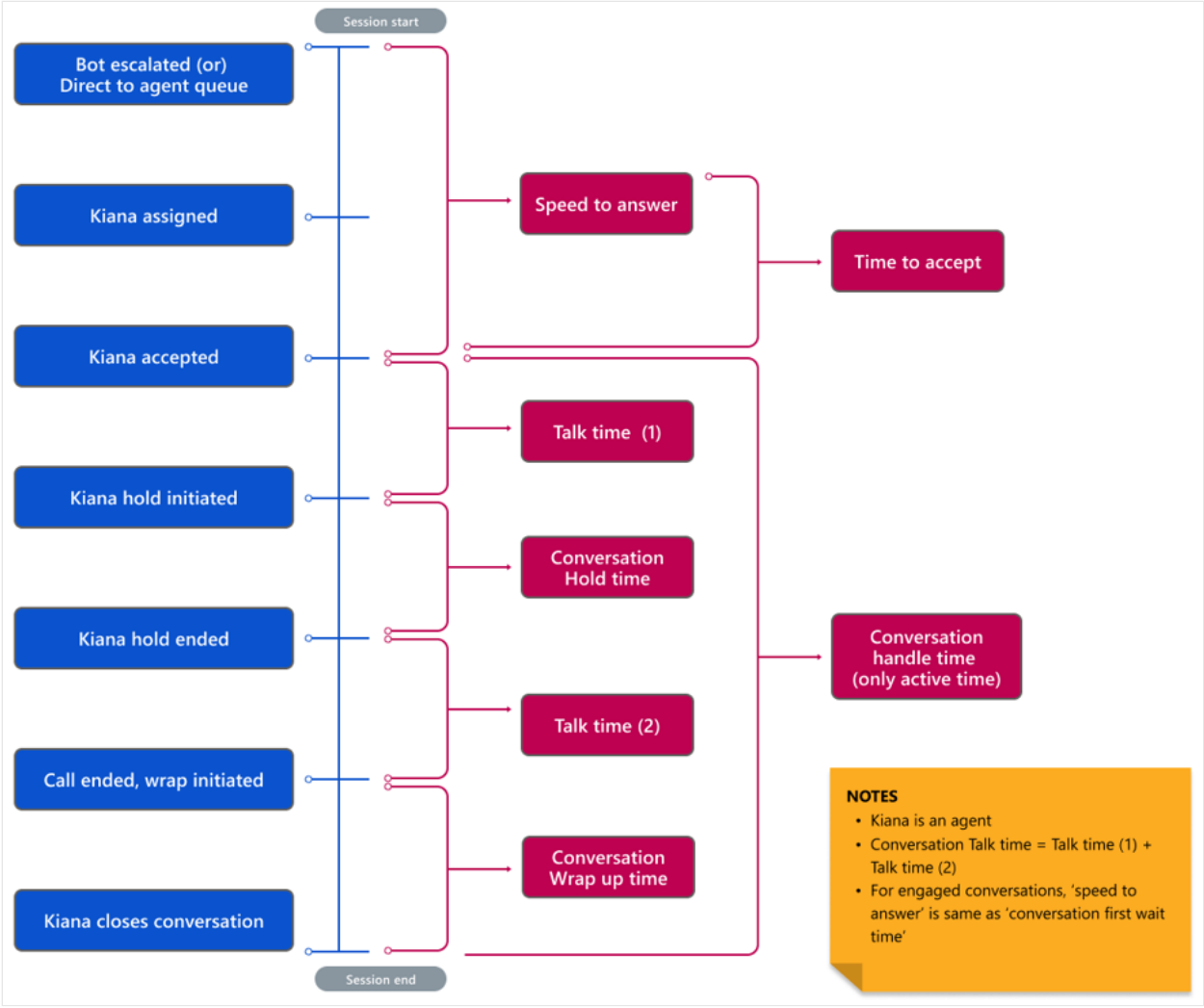
- **Average handle time**: This metric is calculated by dividing the total handle time of all the customer requests by the total number of customers who were served.

For information about metrics that are related to the time that individual agents spend when multiple agents handle conversations, go to the Average session handle time section.

Average conversation hold time

This metric is a measure of the average time, in seconds, that the human agents who handled a conversation had the customer on hold. If multiple agents handled the conversation, the hold time across all the agents is aggregated. This metric is calculated by dividing the total hold time for all customer requests by the total number of customers who were served.

There are several reasons why an agent might put a customer on hold. For example, the agent might have to gather more information or research an issue, perform tasks that don't require interaction (for example, entering data into a system), or work on an offline task. A long hold time can cause customer frustration and might lead to a poor customer experience.



Average conversation talk time

This metric is a measure of the average time, in seconds, that human agents spent actively conversing with customers on the phone for voice conversations. If multiple agents handled the conversation, the conversation talk time is aggregated across all the agents. This metric is calculated by dividing the total talk time for all customer requests by the total number of customers who were served.

Related metric

- **Conversation talk time**: This metric is calculated based on the total talk time across all customer requests.

Average conversation time

This metric is a measure of the average time, in seconds, that a customer who was seeking help from the contact center spent with a human agent. It includes the time that the customer spent waiting for agents to work with them.

Related metric

- **Conversation time**: This metric is calculated as the time between the point when the customer initiated the request and the point when the agent wrapped up the conversation.

Average conversation wrap-up time

This metric is a measure of the average time that an agent spends completing any necessary tasks after the customer disconnects. These tasks might include documenting the conversation, updating notes, or updating the customer's information. The calculation is based on the time between the beginning of the wrap-up and the point when the agent closes the conversation. If multiple agents handled a conversation, this metric applies only to the time that the last agent who worked with the customer spent.

This metric can be viewed in two formats: seconds and *hh:mm:ss*.

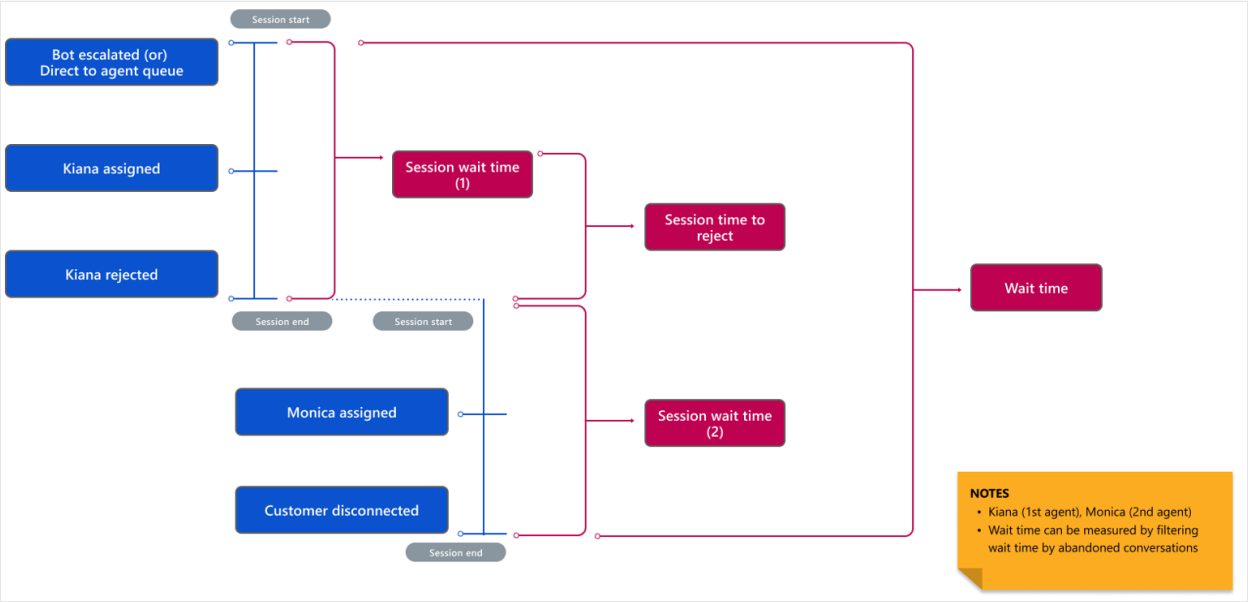
Abandoned conversations

A conversation can be abandoned for multiple reasons. For example, a customer might be disconnected or might cancel the call because of a long waiting period, supervisors might forcibly close requests, or automatic system actions might be configured to respond to handle overflow. Abandoned conversations can lead to customer dissatisfaction because of a lack of assistance from the contact center. A high abandonment rate might require further investigation into operational metrics such as agent availability and queue distribution.

If a bot or IVR handles the customer before it escalates the request to a human agent, this metric is calculated as the number of conversations that were abandoned while customers were waiting for a human agent after the bot escalated the request. If a conversation is abandoned before a bot can be assigned, the conversation is considered abandoned.

If the customer reaches a human agent queue directly, this metric is calculated as the number of incoming conversations that were abandoned.

The conversation direction is *Incoming*. The channels that the conversation came in through are *Messaging* and *Voice*.



Related metric

- **Abandoned rate**: This metric is a measure of the percentage of incoming conversation requests that ended before customers were connected to a human agent. It's calculated by dividing the number of abandoned conversations by the number of bot-escalated conversations.

Active conversations awaiting agent acceptance

This metric is a count of conversation requests from customers that have had agents assigned but that are currently waiting for an agent to accept them and join the conversation. The conversations revert to an *Open* state if the agent rejects or responds to the request.

Active conversations with agent acceptance

This metric is a count of conversations where an agent has been assigned and is actively in contact with the customer. Supervisors can monitor these conversations, track sentiment to ensure customer satisfaction, and intervene as needed.

Waiting conversations

This metric is a count of conversations that are currently in a *Waiting* state. A conversation is moved to a *Waiting* state when the agent closes the session without ending the conversation (that is, without selecting the **End** button on the communication panel), or when the customer closes the browser window without closing the chat widget. If there are asynchronous messaging channels, a *Waiting* state

indicates conversations that are waiting for an agent to respond. For more information, go to Understand conversation states.

Wrap-up conversations

This metric is a count of conversations that are currently in a *Wrap-up* state. A conversation is moved to a *Wrap-up* state when the agent ends the conversation, or when the customer leaves the conversation either by ending it on their side or by being disconnected. For more information, go to Understand conversation states.

Total conversations

This metric is a measure of the total number of customer conversations. For more information, go to Understand conversation states.

Incoming conversation

This metric is a measure of the total number of conversation requests that were initiated by customers across all channels and received by the contact center. For more information, go to Understand conversation states.

Sentiment

The metric is a measure of the current sentiment of customer. It's powered by Omnichannel for Customer Service sentiment analysis.

Average session handle time

This metric is like conversation handle time, but it's granular and is calculated for every agent who works on the conversation. This metric is relevant to conversations that multiple agents handled. If multiple agents were assigned to work on a customer request for any reason (for example, transfers or escalations), this metric measures the average time that each agent who worked with the customer spent. Conversation handle time is a measure of the aggregated session handle time for all the associated sessions.

Related metric

- **Session handle time**: This metric is a measure of the time that agents spend helping customers on assigned customer requests.

Customer sentiment

This metric is a measure of the current sentiment of the customer. It's powered by Omnichannel for Customer Service sentiment analysis.

Is handled by external participant (session)

A customer request might be handled by multiple agents, including a combination of internal contact center agents and external agents. For example, your contact center can engage external agents through transfers to an external phone number or through a Microsoft Teams voice call. This metric is used to identify the portion of a customer request that agents outside Dynamics 365 Customer Service handled. It indicates the sessions that were assigned to and handled by external agents only.

For information about metrics that are related to consultations with external agents, go to the Is handled by external participant (session) section.

Session transfer rate

This metric is a measure of the rate at which agents transfer work that is assigned to them, or the rate at which supervisors transfer work in the queue that they monitor from one agent to another or to another queue. It's calculated by dividing the total number of sessions that were transferred by the total number of sessions that were handled.

Related metrics

- **Is Transferred Out**: This metric indicates whether the conversation and the underlying session were transferred out of a queue.
- **Transferred sessions**: This metric is a measure of the total number of sessions that were transferred.

Session rejection rate

This metric is a measure of the rate at which agents reject work that is assigned to them. It's calculated by dividing the total number of sessions that agents rejected by the total number of sessions that were assigned to them.

Related metrics

- **Rejected sessions**: This metric is a measure of the total number of times that agents rejected work that was assigned to them.

- **Session time to reject**: This metric is a measure of the average time that agents take to reject work that is assigned to them. The calculation is based on the time between the point when a customer request is assigned to an agent and the point when the agent rejects the request.

Session time to accept

This metric is a measure of the average time that agents take to accept work that is assigned to them. The calculation is based on the time between the point when a customer request is assigned to an agent and the point when the agent accepts the request.

Related metric

- **Engaged sessions**: This metric is a measure of the total number of sessions that agents accepted.

Session timeout rate

This metric is a measure of the rate at which sessions time out because of agent inactivity. The agent didn't accept or reject the customer requests. This metric is calculated by dividing the total number of requests where the agent didn't provide any response by the total number of sessions that were assigned to them.

Related metric

- **Timeout sessions**: This metric is a measure of the total number of times that agents didn't respond to the work that was assigned to them.

Session wait time

This metric is a measure of the time, in seconds, that a customer spends waiting in a specific queue before an agent accepts their request. If the customer abandons the request, or if the conversation is transferred to another queue, the calculation is based on the time between the point when the customer request arrives in the queue and the point when the request is closed.

Active sessions

This metric is a count of sessions that are currently in progress. A session is considered active if no agent has yet been assigned to it, it's awaiting agent acceptance, or agents are actively helping customers.

Closed sessions

This metric is a count of sessions that are currently closed.

Total sessions

This metric is a measure of the total number of sessions that were presented to or handled by agents.

Is handled by external participant

A customer request might be handled by multiple agents, including a combination of internal contact center agents and external agents. For example, your contact center can engage external agents through transfers to an external phone number or through a Microsoft Teams voice call. This metric is used to identify the portion of a customer request that agents outside Dynamics 365 Customer Service handled.

Related metrics

- **External participant channel**: This metric helps identify the channels that external agents were engaged through. For example, an external agent can help customers with requests by calling them directly at their phone number or via a Microsoft Teams Public Switched Telephone Network (PSTN) call.
- **External participant channel type**: This metric represents the details of the external agent, such as the phone number.

Session participant count

This metric is a measure of the total number of agents who were involved in helping a customer. These agents include the primary agent who was assigned to work on the session and any subject matter experts who were consulted. You can use the SessionParticipationType dimension to analyze this metric and get further statistics.

Average first response time

Whereas speed to answer provides insights into how quickly an agent was connected with a customer, first response time provides insights into how quickly the agent responded to the customer. First response time is a measure of the time that customers spend waiting for a first response from a human agent. The time is adjusted based on operating hours. The calculation is based on the time between the point when a customer initiates a conversation (or, in the case of a bot-escalated conversation, the point when the bot escalates it) and the point when the agent accepts the request and responds to the customer. For messaging conversations, this time represents how soon the agent sent the first response to customer.

Average first response time is calculated by dividing the total first response time across all engaged conversations by the number of engaged conversations.

The time can be viewed in two formats: seconds and *hh:mm:ss*.

Average agent response time

Agent response time is a measure of the average time that customers who have sent a message must wait to get a response from a human agent. The time is adjusted based on operating hours. Average agent response time is calculated by dividing the total response time by the number of exchanges between customers and agents across all engaged conversations. A longer response time indicates that more time passes between messages as customers wait for an agent to respond and provide updates. A longer response time negatively affects the customer experience.

The time can be viewed in two formats: seconds and *hh:mm:ss*.

First response service level

This metric is a measure of the percentage of customer conversations that have an agent response time of less than 60 seconds.

Agent response service level

This metric is a measure of the percentage of customer messages that have an agent response time of less than 60 seconds.

Assigned capacity profile count

This metric is a count of capacity profiles that are assigned to agents.

Total available work item capacity

This metric is a measure of the maximum number of more work items that can be assigned.

Total work item capacity in use

This metric is a measure of the work items that are currently being handled.

Total work item capacity

This metric is a measure of the maximum work items that are allowed, based on the configuration of the capacity profile.

Logged in agents

This metric is a count of omnichannel agents who are currently signed in.

Total agents

This metric is a measure of the total number of omnichannel agents.

Total available capacity units

This metric is a measure of the capacity units that are available to handle conversations.

Total capacity units

This metric is a measure of the maximum capacity units that are assigned. It applies only to organizations that use capacity units.

Total occupied capacity units

This metric is a measure of the capacity units that are currently occupied.

Status duration

This metric is a measure of the time that an agent spent in a presence status.

See also

Omnichannel for Customer Service dashboards

Overview of Omnichannel real-time analytics dashboards

Report filters and groups

Article • 03/17/2023

In Dynamics 365 Customer Service and Omnichannel for Customer Service, historical analytics reports are grouped into categories.

Omnichannel historical analytics reports:

- **Summary** and **Bot** tabs
- **Conversation**, **Queue**, and **Agent** tabs
- **Topics** tab
- **Voice** tab
- **Unified routing** tab

Customer Service historical analytics reports:

- **Summary**, **Agent**, and **Topics** tabs

Knowledge analytics reports:

- **Search Term Insights** tab
- **Article Insights** tab

When you set one or more filters on a report, the filters are applied to the entire report group. Say, for example, that you've set the "channel" filter to display records related to the live chat channel in the **Conversation** tab of the Omnichannel historical report. This filter is automatically applied to other tabs of the report group—**Queue** and **Agent**—but not to the **Bot**, **Summary**, **Topics**, **Voice**, or **Unified routing** tabs.

Next steps

Manage report bookmarks

See also

Configure analytics and insights dashboards

Manage bookmarks for reports

Article • 05/26/2023

A bookmark captures the state of a report page, including changes that you've made to the filters. Personalize your reports and save the time and effort required to reapply the filters every time you want to view specific data. Use bookmark options to select a saved view, update or delete a bookmark, and set a bookmark as your default view.

A bookmark that you create for a report group saves a personalized view using that group's filters. For example, if you create a bookmark in the Omnichannel historical report's **Conversation** tab, the bookmark applies to the **Conversation**, **Queue**, and **Agent** tabs, and doesn't include filters for the other tabs.

You can use bookmarks in all the out-of-the-box reports—Customer Service historical analytics, Omnichannel historical analytics, Omnichannel real-time analytics, and knowledge analytics reports.

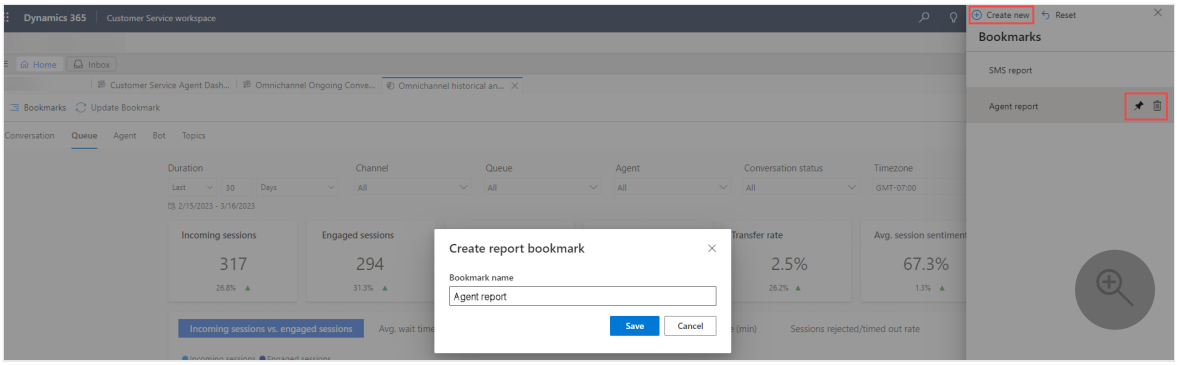
Prerequisites

Grant **Create**, **Read**, **Write**, and **Delete** privileges to applicable security roles for the **Report Bookmark** custom entity. Configure user access to analytics and dashboards.

Create bookmarks

> **Tip**
>
> Images that include an icon that looks like this: may be expanded to show more detail. Select the image to expand it. To close it, press the Esc key.

1. In Customer Service workspace, open one of the following reports, **Customer Service historical analytics**, **Omnichannel historical analytics**, **Omnichannel real-time analytics**, or **Knowledge analytics**.
2. On the report page, select a tab, such as **Queue**.
3. Use the report filters to customize the data in your view.
4. Select **Bookmarks**, and then select **Create new**.
5. Enter a name for the bookmark, and then save it.



Manage bookmarks

Select **Bookmarks**, and then on the **Bookmarks** menu:

- To delete a bookmark, select the delete icon.
- To set a bookmark as the default view for the report, select the pin icon. The report always opens to the pinned view.
- To reset the bookmarked view of a report, select **Reset**.

To modify a saved view, adjust the report filters as needed. Then select **Bookmarks** > **Update Bookmark**.

See also

Customer Service dashboards
Omnichannel for Customer Service dashboards
Knowledge analytics

Forecast case and conversation volumes, and agents for conversations (preview)

Article • 04/06/2023

ⓘ Important

To use this feature, it must be turned on and the license terms must be accepted. **What are Preview features and how do I enable them?**

A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality.

We expect changes to this feature, so you shouldn't use it in production. Use it only in test and development environments.

Microsoft doesn't provide support for this preview feature. Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate **supplemental terms of use**.

Introduction

ⓘ Important

This feature is intended to help customer service managers or supervisors enhance their team's performance and improve customer satisfaction. This feature is not intended for use in making, and should not be used to make, decisions that affect the employment of an employee or group of employees, including compensation, rewards, seniority, or other rights or entitlements. Customers are solely responsible for using Dynamics 365 Customer Service, this feature, and any associated feature or service in compliance with all applicable laws, including laws relating to accessing individual employee analytics and monitoring, recording, and storing communications with end users. This also includes adequately notifying end users that their communications with agents may be monitored, recorded, or stored and, as required by applicable laws, obtaining consent from end users before using the feature with them. Customers are also encouraged to have a mechanism in place to

inform their agents that their communications with end users may be monitored, recorded, or stored.

Customer service supervisors need to be able to ensure they have an adequate number of agents available to serve their customers. Overcapacity results in higher costs, while under capacity results in longer customer wait times, which in turn can negatively impact customer satisfaction.

As a supervisor, you can use the forecast reports to help plan the right level of staffing for your business based on the predicted volume of cases and conversations, along with the predicted agent demand for conversations.

You can use the forecast reports for agent, case, and conversation volumes in the following ways:

- Forecast upcoming case and conversation volumes based on historical traffic and the number of agents needed to meet the forecasted conversation volume. For conversation volume forecasting, if your administrator has set up chatbots for your conversational channels, the system excludes conversations that chatbots handle without a human agent joined, so that you can rely on the predicted conversation volumes for human agent staffing.
- Visualize forecasted volumes and agent demand on a daily basis, for a time range up to six months depending on how many days of cases or conversations were created in the past. This forecast can be used to plan agent resourcing and recruitment, to meet future demand.
- Visualize forecast volumes and agent demand on a 15-minute interval basis, for a time range up to six weeks, depending on how many days of cases or conversations were created in the past. This forecast can be used to schedule agents to meet the near-term demand.
- Slice forecasted volumes and agent demand by channel and queue.
- View a rollup of actual and forecasted volume by an hourly, daily, weekly, monthly and yearly basis. For the agent demand report, you can select the type of rollup from maximum, minimum, average and sum.
- Automatically detect seasonality from historical traffic with the settings option to import your holiday calendar. This helps the forecasting model to accurately predict case or conversation volumes during special, seasonal events.

For details about how the forecast models work for this feature, see How agent forecasting for conversation works and How case volume forecasting works.

> **Note**
>
> Be aware of the following when using the Forecast report:
>
> - Forecasts might misstate volume estimates for many reasons, including unanticipated trends or business developments.
> - The Forecast report is currently available in certain geographical locations. More information: **Regional availability and Service limits for Customer Service**

Prerequisites

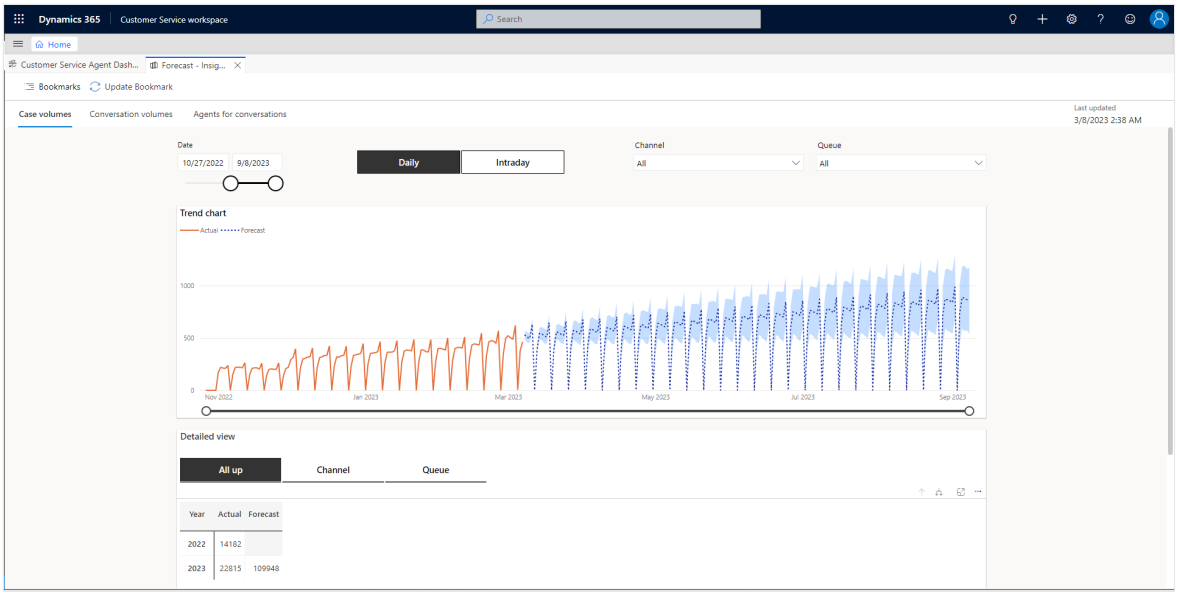
Before you can use the forecast reports, ensure that your administrator has assigned a role to you that has **Read** privileges on the **msdyn_dataanalyticsreport_forecast** table. More information: Configure case volume forecasting (preview) and Configure agents for conversations forecasting (preview).

View the Forecast reports in Customer Service

Navigation

You can view the forecast reports in the Customer Service workspace or Omnichannel for Customer Service apps. You can navigate to the **Forecast (preview)** dashboard as follows:

- In the default view, select the plus (+) icon, and then select **Forecast (preview)**.
- If the enhanced multisession workspace view is enabled, select **Forecast (preview)** on the site map.



Switch report mode

The forecast reports support two modes:

- **Daily**: This mode displays the actual and predicted case and conversation volumes and agent demand per day, for a time range of up to six months, depending on how many days of cases or conversations were created in the past. This forecast can be used to plan agent resourcing and recruitment to meet future demand.
- **Intraday**: This mode displays the actual and predicted case and conversation volumes and agent demand in intervals of 15 minutes, for a time range of up to six weeks, depending on how many days of cases or conversations were created in the past. This forecast can be used to schedule agents to meet the near-term demand.

To change the report mode, select the **Daily** or **Intraday** toggle button on the report, depending on which mode you want to view the report in.

Filters for case, conversation, and agents for conversations forecasting

The **Case volumes**, **Conversation volumes** and **Agents for conversations** tabs of the forecast report display visual and numeric metrics for the filters you select. The difference between the tabs is based on the input data source. Case data is based on the case entity, whereas conversation data is based on the omnichannel conversations, such as live chat, digital messages, the voice channel, and so forth.

Report data is refreshed on a monthly basis. Your administrator can configure which day of the month the report will be refreshed. More information: Configure case volume forecasting (preview) and Configure agents for conversations forecasting (preview).

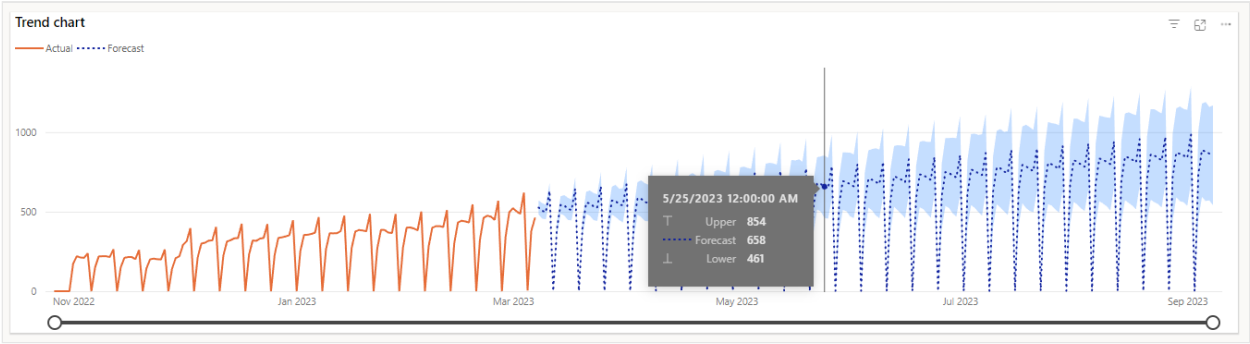
You can filter the data on each of the tabs by using any of the following options:

Filter	Description
Duration	Input the date range or use the sliders to set the dates.
Channel	Select the channel(s) for which you want data displayed.
Queue	Select the queue(s) for which you want data displayed.

Data visualization

The forecasting section on each tab of the report displays a visual trend from historical volumes from the past to the predicted volume in the future. The forecast is based on actual case, conversation, and agent records created in the past.

The **Confidence level** for the forecasted data is displayed on the right-hand side in blue, indicating the level of confidence in the predicted volume. The narrowest part of the blue area indicates higher confidence. You can hover on the report to display the forecast based on data for specific dates.



Hover on the future side (dash line) of the report to show a range that includes an upper- and lower-bound confidence range, which indicates the amount of possible variance that could occur from the predicted volume number.

View volume forecasting by numbers

The number grid at the bottom of the report shows the actual and predicted number of cases, conversations, or agent demand across different date and time hierarchies.

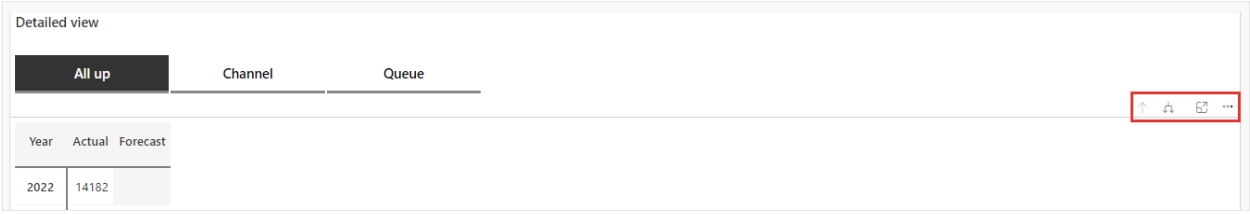
You can filter the data by selecting from the following options:

Filter	Description
All up	Displays the actual and forecasted numbers across all channels and queues. You can use the drill up and down buttons to drill to specific levels in the hierarchy.

Filter	Description
Channel	Displays the actual and forecasted numbers, sliced by each channel. You can use the drill up and down buttons to drill to specific levels in the hierarchy.
Queue	Displays the actual and forecasted numbers, sliced by each queue. You can use the drill up and down buttons to drill to specific levels in the hierarchy.

Filter data by drilling up or down

You can drill into the report data table by using the up or down arrows at the top-right side of the number grid to display data by day, week, month, or year for **Daily**, and by minute, hour, day, week, month, or year for **Intraday**.



You can drill down the hierarchy by selecting the drill down hierarchy button. Each time you select the drill down button, the data will drill down one level in the hierarchy. To drill up to the previous level, select the drill up button.

Select rollup mode (Agents for conversations report only)

The Agents for conversations report allows you to select the rollup method that will be used in the number grid. The selected method is used to roll up data at higher levels in the date and time hierarchy. The following rollup methods are available:

- **Average**: This method averages the available data at a level in the date and time hierarchy to roll up to the next higher level in the hierarchy.
- **Maximum**: This method picks the maximum from the available data at a level in the date and time hierarchy to roll up to the next higher level in the hierarchy. *This is the default rollup that's selected when you access the report for the first time.*
- **Minimum**: This method picks the minimum from the available data at a level in the date and time hierarchy to roll up to the next higher level in the hierarchy.
- **Sum**: This method sums the available data at a level in the date and time hierarchy to roll up to the next higher level in the hierarchy.

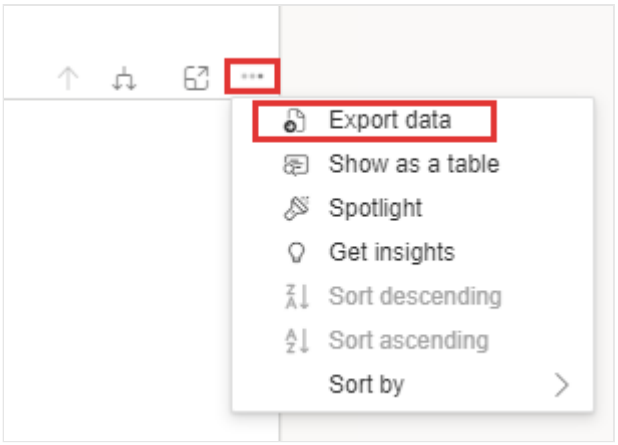
> ⓘ Note

Average, **Maximum**, and **Minimum** rollup methods in the **All up** view work differently than the regular rollup using the same methods. In the regular rollup, the rollup method is applied to the aggregate data across channels and queues. However, in the **Agents for conversations** report, the data at a particular level in the date and time hierarchy is the sum of the applied rollup method to the data for each unique channel and queue combination at the immediate lower level in the hierarchy.

For example, the data at the **Month** level will be calculated by summing up the selected rollup method to the data at the **Week** level for each unique combination of channel and queue.

Export data

You can export the report data by selecting **Export** on the command bar.



See also

Configure case forecasting (preview)
Configure agent forecasting for conversation (preview)
Introduction to Customer Service Insights
Regional availability and Service limits for Customer Service
Manage report bookmarks

Customize visual display

Article • 05/26/2023

Dynamics 365 Customer Service provides out-of-the-box analytics reports that help you visualize key performance indicators (KPIs) and trends for standard contact center workflows. You can use an embedded Power BI editor to customize the out-of-the-box reports to meet your organization's needs:

- Reveal out-of-the-box metrics that may be more relevant to your organization.
- Modify how the data is displayed; for example, change a tabular view to a graphic that displays the trend over time.
- Add new pivots and pages; for example, create a pivot or page that's dedicated to a specific queue with queue-level metrics.
- Rearrange out-of-the-box report layouts and change themes.

You can customize Customer Service historical, Omnichannel historical, and Omnichannel real-time analytics reports in Customer Service workspace. You can't customize unified routing and knowledge analytics reports.

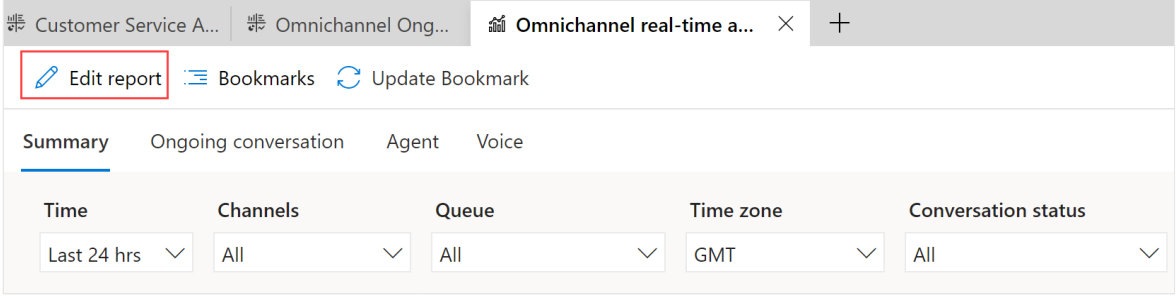
Prerequisites

To edit analytics reports, users must have the **Analytics Report Author** role. Assign roles to users.

Customize the display of analytics reports

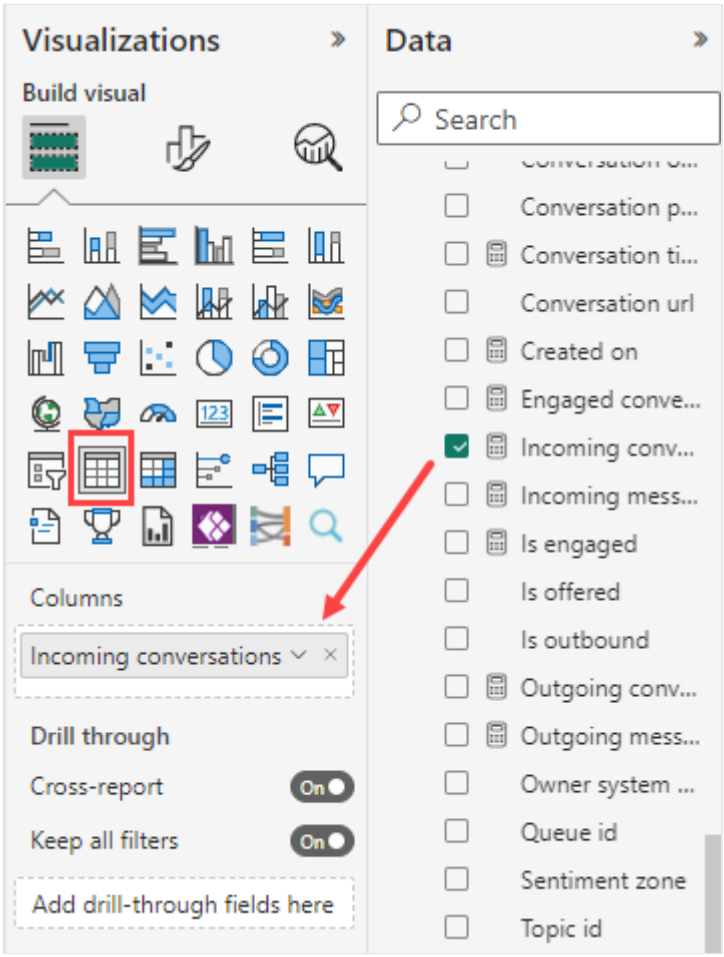
1. In Customer Service workspace, open the **Omnichannel real-time analytics**, **Omnichannel historical analytics**, or **Customer Service historical analytics** report.

2. Select **Edit report** to open the embedded Power BI editor.

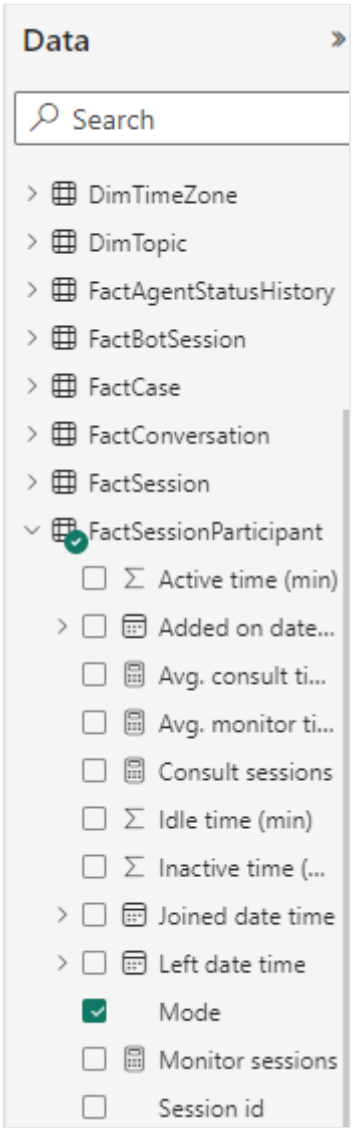


3. Use the following panes to customize the report:

- **Visualizations**: Select the visualizations you want in your report. You can delete a currently displayed visualization and add the one you prefer. For example, you can show **Incoming conversations over time** as a table instead of the default bar chart.



- **Data**: Select the KPIs, measures, dimensions, and attributes you want to show in your report. The list includes all the metrics that are available for use, not just the ones that are displayed in the out-of-the-box reports. For example, you can use the **Participation Mode** metric in **FactSessionParticipant** to count the number of times a subject matter expert accepted a consult request. Understand the out-of-the-box data model.



4. When you're done selecting the customizations you want for your report, select **Save** and then **Publish**.

After you publish the report, all customizations become visible to all users in your organization.

To revert all your changes to the original report settings, select **Edit report** > **Checkout default report** > **Reset**.

> **Important**
>
> If you select **Reset**, any customizations you've made are permanently removed.

To continue editing the report after you've published it, select **Resume editing**.

> **Note**

Don't add more than 20 metrics or tiles to a report because it affects the report's performance. If you need more metrics, consider creating more pages and provide links to the extra pages from the existing pages.

Understand the out-of-the-box data model

The out-of-the-box data model consists of *facts* and *dimensions*. Facts represent the data you want to analyze. Dimensions represent the attributes of the data that you want to break down to explore further.

Fact tables organize key KPIs logically. For example, **FactConversation** has conversation metrics like **Average handle time**, while **FactAgent** has **Agent metrics**.

You can use facts and dimensions to visualize data according to your organizational requirements. If you'd like to understand how average handle time varies by queue, create a visualization like a bar chart, and divide the fact **FactConversation** > **Average Handle Time** by the dimension **DimQueue** > **Queue Name**.

Future data model updates

If you've customized your reports and Microsoft changes the default data model for a report, the data model updates don't overwrite your customizations. However, if the naming conventions in the Power BI embedded editing experience change, those changes are reflected in the respective list. You may need to reselect the metric with the new name. Learn more about data models and report mappings for historical analytics reports in Customer Service.

See also

Introduction to Customer Service Insights
Configure Customer Service analytics and insights
Configure Customer Service Analytics dashboards in Power BI
Configure Omnichannel historical analytics

Overview of data model customization

Article • 07/19/2023

Data model customization helps you customize the out-of-the-box standard reports and add your own KPIs (key performance indicators) and custom metrics, so that you can use the data that's most relevant to your organization.

As new features are added, metric definitions and calculations continually need to be updated to account for additional workflows that are enabled by new features. Using the out-of-the-box model and creating only those metrics that are unique to your organization reduces the risk of metric definitions becoming outdated.

What is data model customization?

Dynamics 365 Customer Service provides a suite of out-of-the-box analytic dashboards that are built on Power BI. These analytic solutions provide industry standard KPIs and metrics that can help you monitor and improve the performance of your contact center. Power BI solutions deploy two components: a data model (sometimes referred as a dataset) and a report. The data model houses the KPIs, while reports help visualize this data for supervisors.

Every organization that has analytics enabled gets the analytics solution deployed and available only to them. Dynamics 365 leverages the data from Dataverse, performs transformation logic for each of the KPIs, and makes these KPIs available for you within these data model, which also means they can't be edited.

However, the reports that are deployed for your organization can be edited and customized. With visual customization, you can edit the reports to present the available data as per your organizational requirements. For example, Dynamics 365 reads all the required data, performs the logic required to calculate the average handle time, and makes it available for you in the data model. You can choose to edit and present this as a chart or a table as required, and drill down to see the average handle time for a queue or user. Visual customizations also give you the ability to leverage out-of-the-box metrics that aren't directly exposed, create new pivots, and analyze data with additional dimensions.

At times, you might have scenarios where you'd like to modify the data that's available in the dataset or the logic used to calculate the metrics in the dataset. The following section describes scenarios where you might need to modify the available data or the logic used to calculate the metrics in the dataset. These scenarios are typically driven by processes that are unique to your organization.

Scenario-based use cases

- **Scenario 1**: You need to create variants of the default metrics provided in the dataset that are similar but use a different logic. For example, while service-level metrics for 10, 20, 30, 40, 60, and 120 seconds are provided in the Omnichannel real-time reports, you have a team that works on service levels of 150 seconds and wants to see that metric on the reports.

- **Scenario 2**: Your organization calculates a metric that's provided differently by default, but would like to compute it based on your organization's logic. For example, only the time spent by the primary agent (active agent who owns and is assigned to the conversation) is considered when calculating average handle time. For more information on metrics, go to: Use Omnichannel for Customer Service metrics. Time spent by SMEs consulting is offered as a separate metric. Your organization wants to include this time in the handle time.

- **Scenario 3**: Your organization has customized attributes on the out-of-the-box Dynamics 365 entities, or has custom entities to support your workflows and process and would like to include those attributes, or has metrics built on those attributes in the reports. In addition, your organization wants to report on out-of-the-box attributes that aren't included by default in the reports or the dataset. For example, your organization has a customized user entity to include a region attribute and would like to get a drill-down of the resolution time by region.

- **Scenario 4**: Your organization wants to build a custom dashboard that brings data from multiple applications that your organization uses. For example, you might have an existing Power BI dashboard that brings operational data from your workforce management systems, and you'd like to show Dynamics 365 data, like agent presence, on this dashboard.

How data model customization helps you

Data model customization helps you with scenarios and more. Data model customization deploys a copy of the dataset used by out-of-the-box reports into your organization's Power BI workspace, allowing you to build composite models.

For the historical data model, the dataset connects to the Azure Data Lake that hosts the transformed historical Dynamics 365 data and exposes the metrics. For a real-time data model, the dataset uses TDS connectors to connect directly to your Dynamics 365 database and executes the logic required to compute the real-time metrics.

By creating a local model within your workspace that connects to the Dynamics 365 data model, you can create new metrics while retaining all the out-of-the-box metrics, thus saving time and effort. You can add the Dynamics 365 data model to existing reports without having to rebuild them.

By leveraging the model and not recreating metrics that are available in out-of-the-box model, you also ensure that the logic used to calculate these metrics always stay updated.

How data model customization works

Data model customization requires your organization to have a paid Power BI service, and uses two workspaces within your Power BI service.

Managed workspace

This workspace is provisioned and maintained by Dynamics 365 Customer Service. The Dynamics 365 datasets are deployed into this workspace.

- For real-time data model configuration, a workspace named **Omnichannel Managed Workspace_(GUID)** is created. The real-time data model is hosted within this workspace. It uses TDS connector to extract data from Dynamics 365 continually and to calculate real-time metrics.
- For historical data model configuration, a workspace named **Customer Service Managed Workspace__(GUID)** is created. The historical data model is hosted in this workspace. This data model is refreshed daily with the latest data from the Azure Data Lake. Historical data from the last two years is processed daily and transformed into KPI stored in the data lake.

> ⓘ **Note**
>
> This single data model supports both case and conversation analytics. Knowledge analytics and unified routing analytics aren't available for customization.

Each time the out-of-the-box data model is updated because of newer release versions, the data model deployed to the managed workspace is also updated to ensure that your organization gets the latest updates, which includes newer metrics, updates to logic of existing metrics, and bug fixes.

> ⓘ **Note**

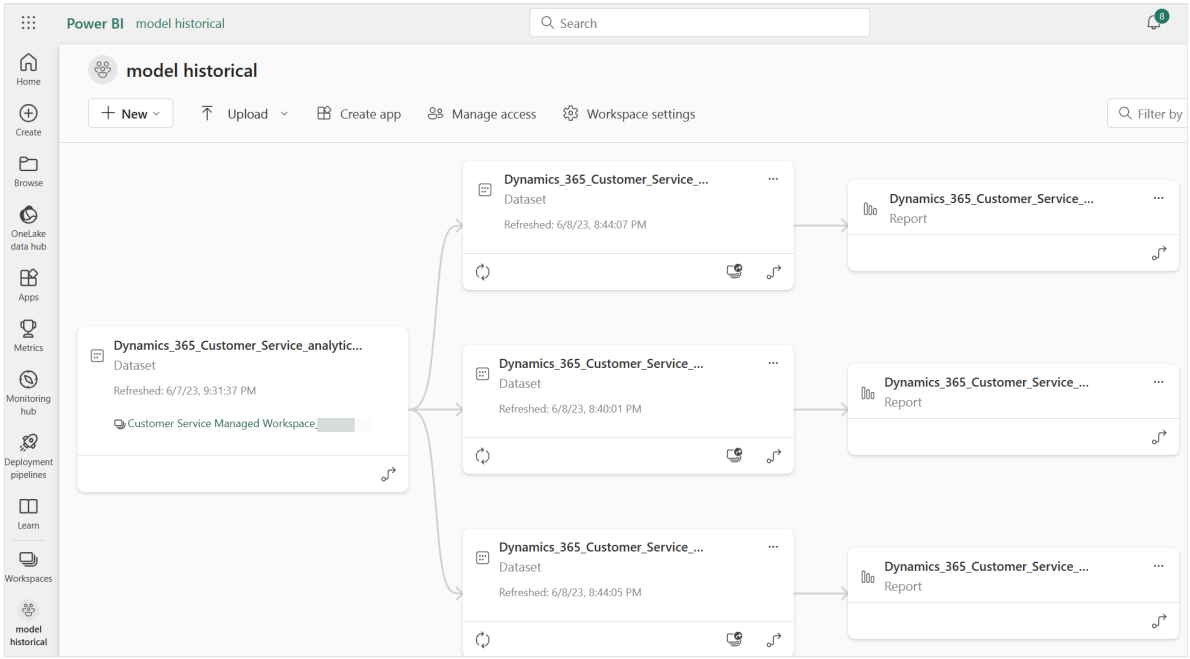
We recommend treating the dataset in the managed workspace as read-only. We recommend that you don't make changes to this dataset, as it might lead to report malfunction. Any changes made to the data model in the managed workspace will be overwritten whenever a newer version is released.

Customer workspace

A copy of the out-of-the-box reports are created in this workspace. During the configuration, you can either create a new workspace or can specify an existing workspace.

Depending on the features you've enabled, you may see up to three different reports created in the workspace you selected for historical data model customization and one report in the real-time data model customization.

Historical data model customization



Each report is connected to its own composite dataset, which in turn connects to the data model in the managed workspace.

These report copies can be edited and updated to suit your needs, and are provided as a base for you to build on instead of having to build entire reports from scratch. These reports are created only when the feature is configured, and are never updated. These reports won't be overwritten when out-of-the-box reports are updated.

You can choose to specify the same workspace for both historical and real-time analytics.

See also

Dataverse entities used in historical and real-time analytics
Customize data models of historical and real-time analytics reports
Customize visual display

Use the out-of-the-box data model in your custom reports

Article • 06/12/2023

This articles describes how you can create a new report that leverages the out-of-the-box data model. You can also extend this report and add new metrics based on the available data within the Dynamics 365 Customer Service dataset.

Prerequisites

- Your administrator must enable data model customization. More information: Enable Power BI data model customization
- You must have the required Power BI permissions.

Create a new report based on Dynamics 365 Customer Service dataset

1. Go to Power BI desktop, and then go to **File** > **New**.
2. Select **Get data** > **Microsoft Fabric (Preview)**, and then from the list, select **Power BI dataset** or **Search for Power BI datasets**.
3. Select the appropriate dataset, depending on whether you require historical or real-time metrics. Make sure you select the data model from managed workspaces.

   The tables and attributes from the managed data model are now available for you to use in your report in the data panel.
4. Select **Connect**.
5. After you're done with your edits, select **File** > **Publish**, to publish the new report back to Power BI.

> **Note**
>
> We recommend that you don't use hidden out-of-the-box facts or dimension fields in your custom reports, as these fields might be modified or deleted in future updates.

Add Dynamics 365 Customer Service dataset to existing reports

- Download a copy of the report. Make sure you download with a live connection to data online.
- If you'd like to edit the out-of-the-box copy of the report, download the report from the customer workspace.

To add Dynamics 365 Customer Service dataset to existing reports:

1. Go to the Power BI service, and then select the report from your custom workspace.
2. Select **File** > **Download this file**.
3. Select the option to download a copy of your report with a live connection to data online.
4. Select **Get data** > **Power BI datasets**.
5. Select the appropriate dataset, depending on whether you require historical or real-time metrics. Make sure you select the data model from managed workspaces.

   The tables and attributes from the managed data model are now available for you to use in your report in the data panel.
6. After you finish your edits, select **File** > **Publish**, to publish the updated report back to Power BI.

Extend the out-of-the-box data model

Add new metrics based on data available in the Dynamics 365 Customer Service dataset

If you need to create a metric within the existing entities (as described in Scenario 1 and Scenario 2, perform the following steps:

1. Go to the Power BI desktop and open the report you want to edit. Make sure you use the steps described in Add Dynamics 365 Customer Service dataset to existing reports, to ensure that your report is connected to the Dynamics 365 Customer Service dataset.
2. Right-click the entity for which you want to create your new metric.

3. Enter the Data Analysis Expressions (DAX) logic for real-time metrics after selecting the required attributes such as name and data type. For more information about DAX, go to DAX function reference.

4. Save your measure and include it in your visualization as required.

5. Publish your newer version to Power BI by selecting **File** > **Publish**.

> **Note**
>
> If you need to rename an existing column, you'll have to create a new local model.

Example

Here's an example that describes how to create a new service level of 150 seconds for real-time reports.

1. Go to the Power BI service, and then select the report from your custom workspace.

2. Download the real-time report with a live connection and open it in Power BI.

3. Right-click the **FactConversation** entity and select **New measure**.

   Refer to the Data model mapping for real-time analytics reports in Omnichannel for Customer Service to get the logic used to calculate the out-of-the-box metrics, which you can use to build your logic.

4. Enter the following code:

```
Service level (150 seconds) =
    DIVIDE (
        SUMX (
            FactConversation,
            IF (
                FactConversation[ConversationFirstWaitTimeInSeconds] <=
150
                    && FactConversation[IsAgentAccepted]
                    && NOT FactConversation[DirectionCode],
                1,
                0
            )
        ),
      SUMX (
            FactConversation,
            IF (
```

```
                FactConversation[IsAgentAccepted]
                    && NOT FactConversation[DirectionCode],
                1,
                0
            )
        ),
        BLANK ()
    )
```

5. Ensure that the format is **Percentage**, and then select **Save**.

6. Replace the **Service level (60 seconds)** on the Summary Report page with the newly created Service level (150 seconds) measure.

7. Select **Save**, and then select **File** > **Publish** to Power BI.

Add new metrics based on Dynamics 365 Customer Service dataset and external data

If you need to get additional data, both from within Dynamics 365 Customer Service as well as external data, as described in Scenario 3 and Scenario 4, perform the following steps:

1. Go to Power BI desktop and open the report you want to edit.

   Make sure you use the steps described in Add Dynamics 365 Customer Service dataset to existing reports to ensure that your report is connected to the dynamics data model.

2. Select the **Modeling** tab, and then select **Make changes to this model**.

   You may be asked to create a local model to bring in additional data sources. This creates a data model within the workspace where the report exists. This local model (for the report) uses a DirectQuery connection to connect to the Dynamics 365 model so you can leverage metrics from the dynamics model while adding your own.

3. Select **Add a local model**.

4. On the **Connect to your data** dialog, select **Submit**.

5. If you need to bring additional attributes from Dynamics, select **Dataverse**. For other applications, use the appropriate source.

6. On the **Navigator** pane, select the entity, and then select **Transform data**.

7. On the **Connection Settings** dialog, select the preferred connection, and then select **OK**.
8. After the local model is created, select **Get data**, and then select the appropriate data source.
9. On the **Modeling** tab, select **Manage relationship** to create relationships between the new entities that you've added with existing entities.
10. Right-click the entity for which you want to create your new metric.
11. Enter the DAX logic after selecting the required attributes such as name and data type.
12. Save your measure and include it in your visualization as required.
13. Publish your newer version to Power BI by selecting **File** > **Publish**.

Example

Here's an example that describes how to filter the out-of-the-box Customer Service historical reports by a user's title.

1. Go to Power BI service, and then select the report from your custom workspace.
2. Download the Customer Service historical analytics report with live connection and open it in Power BI.
3. Create the local model using the steps explained earlier.
4. In the **Navigator** pane, select the appropriate Dynamics Customer Service organization. As the metrics will be based on Dynamics 365 data, Dataverse connector is used.
5. From the list of entities, select the entity (or entities) that you need. Use the **system user** entity.
6. Select **Transform data** to apply the necessary filters and to remove unwanted columns.

   As a best practice, make sure you pull only the data that's necessary to ensure optimal performance and refresh rates. You can choose to use **Import** mode or **DirectQuery** mode, depending on the your needs. In case of real-time reports, you may choose to use **DirectQuery** to help ensure that you get the latest data every time. To prevent any confusion, this entity can be named **UserTitle**.

The new entity, **UserTitle**, and the **Title** attribute are loaded and available for you. To successfully create a relationship between this new entity and existing data, we need the User Id as well.

7. Select the **Modeling** tab, and **Manage relationship** to create a new relationship between **DimAgent** entity and the newly created **UserTitle** entity using the agent Id attribute.

   You can then add this as a filter to the existing report or add newer metrics if required based on this attribute.

8. Select **Save**, and then select **File** > **Publish to Power BI**.

Publish reports back to Dynamics 365 Customer Service

After you've created the new reports, you can enable your Dynamics 365 users to be able to view these reports from the Customer Service workspace app. Work with your administrator to ensure that the viewers have appropriate access to view and embed these reports in Dynamics 365.

Next steps

Customize data models of historical and real-time analytics reports
Data models and report mappings for historical analytics reports in Customer Service
Data model mapping for real-time analytics reports in Omnichannel for Customer Service Overview of data model customization

Data models and report mappings for historical analytics reports in Customer Service

Article • 06/12/2023

This article lists the out-of-the-box data models and report mappings for historical reports. Use the information to edit the report mappings for the various out-of-the-box reports.

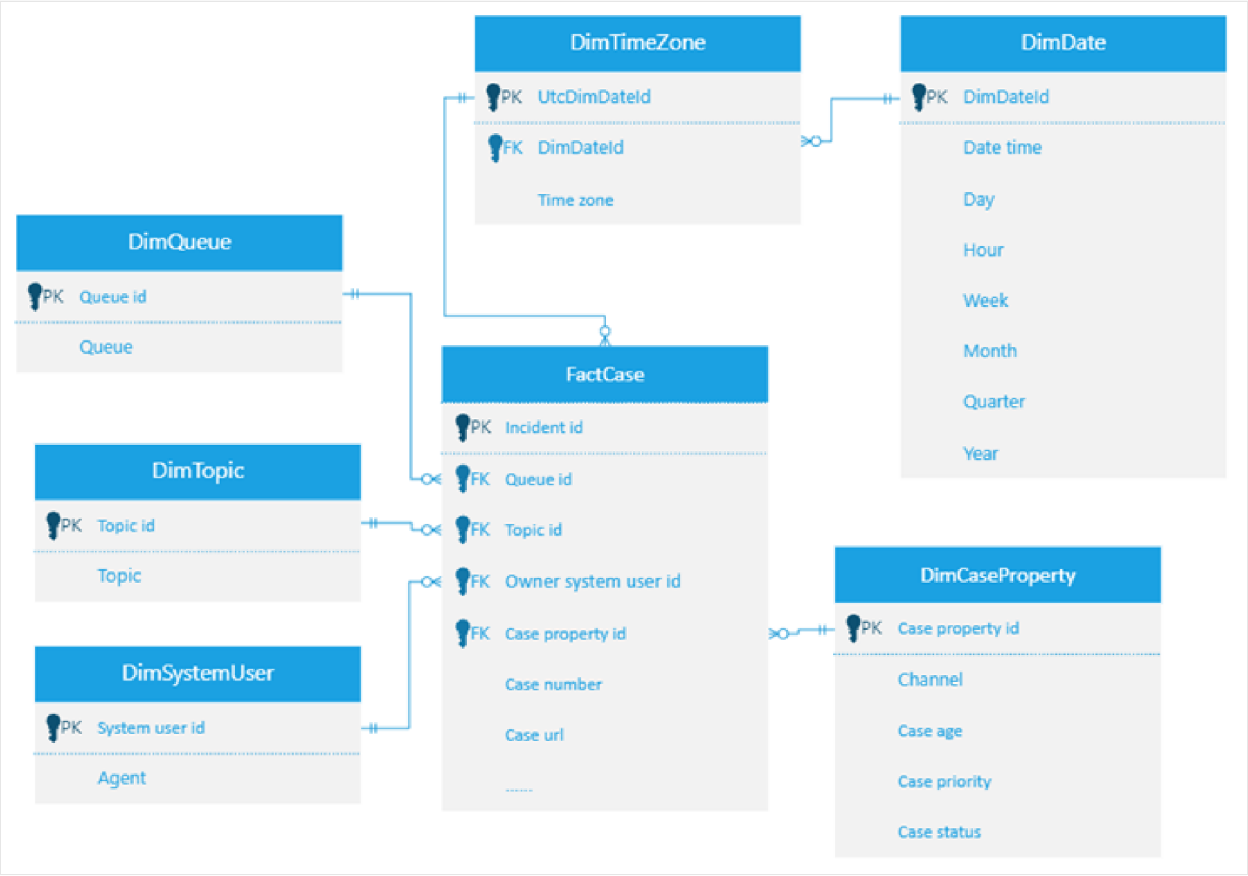
Customer service manager analytics

Edit the report mapping

Use the Dynamics_365_Customer_Service_Omnichannel_analytics.pbix file to edit the following reports:

- Summary
- Agent
- Topics
- Bot

Data model



Data dictionary

Entities	Attributes	Description
DimDate	Date time	Date time. The type is Date/Time.
DimDate	Day	Day name. Example: "Fri".
DimDate	Year	Year number. Example: "2021".
DimDate	Week	Week number. Example: "1".
DimDate	Month	Month name. Example: "Apr 2021"
DimDate	Quarter	Quarter name. Example: "Q1".
DimDate	Hour	Hour. Example: "01:00", "01:30"
FactCase	Incident id	Incident id, Primary key. Type: Guid.
FactCase	Case number	Case number value.
FactCase	Queue id	Queue id. Foreign key to DimQueue.
FactCase	Owner system user id	Owner system user id. Foreign key to DimSystemUser.
FactCase	Case url	URL for case.

Entities	Attributes	Description
FactCase	Case property id	Foreign key to DimCaseProperty.
FactCase	Topic id	Topic id. Foreign key to DimTopic.
FactCase	Case title	Case title.
FactCase	Created on	Date created on.
FactCase	Incoming cases	Incoming cases count.
FactCase	Total cases	Total case count.
FactCase	Resolved cases	Case count when case status is resolved.
FactCase	Active cases	Case count when case status is active.
FactCase	Canceled cases	Case count when case status is canceled.
FactCase	Escalated cases	Case count when case is escalated.
FactCase	Escalated rate	Rate that escalated cases divided by total cases.
FactCase	Case volume	Total case count per topic divided by total cases.
FactCase	Case volume change	Total case count link relative ratio for the same date range filter.
FactCase	Avg. resolve time (hrs	Average time for case handle time.
FactCase	Avg. case age (days)	Average case age
FactCase	First response - SLA %	Total cases when first response sent is false divided by total cases.
FactCase	Avg. CSAT	Average CSAT score.
FactCase	CSAT impact	Change ratio for the CSAT.
FactCase	Avg. survey sentiment	Average survey sentiment.
FactCase	Survey sentiment impact	Change ratio for the sentiment.
DimQueue	Queue	Queue name.
DimQueue	Queue id	Queue ID. Primary key. Type: Guid.
DimSystemUser	Agent	Name of the agent.

Entities	Attributes	Description
DimSystemUser	System user id	System user ID.
DimCaseProperty	Case status	Case status value, Example: Active, Canceled, Resolved.
DimCaseProperty	Case priority	Case priority value, Example: Low, High, Normal.
DimCaseProperty	Channel	Case channel.
DimCaseProperty	Case age	Description for case age, Example: 4-7 Days, <1 Day, 1-3 Days
DimCaseProperty	Case property id	Case property ID. Primary key.
DimTopic	Topic	Topic name.
DimTopic	Topic id	Topic ID. Primary key. Type: Guid.
DimTimeZone	Time zone	Time zone code. Example: GMT +01:00

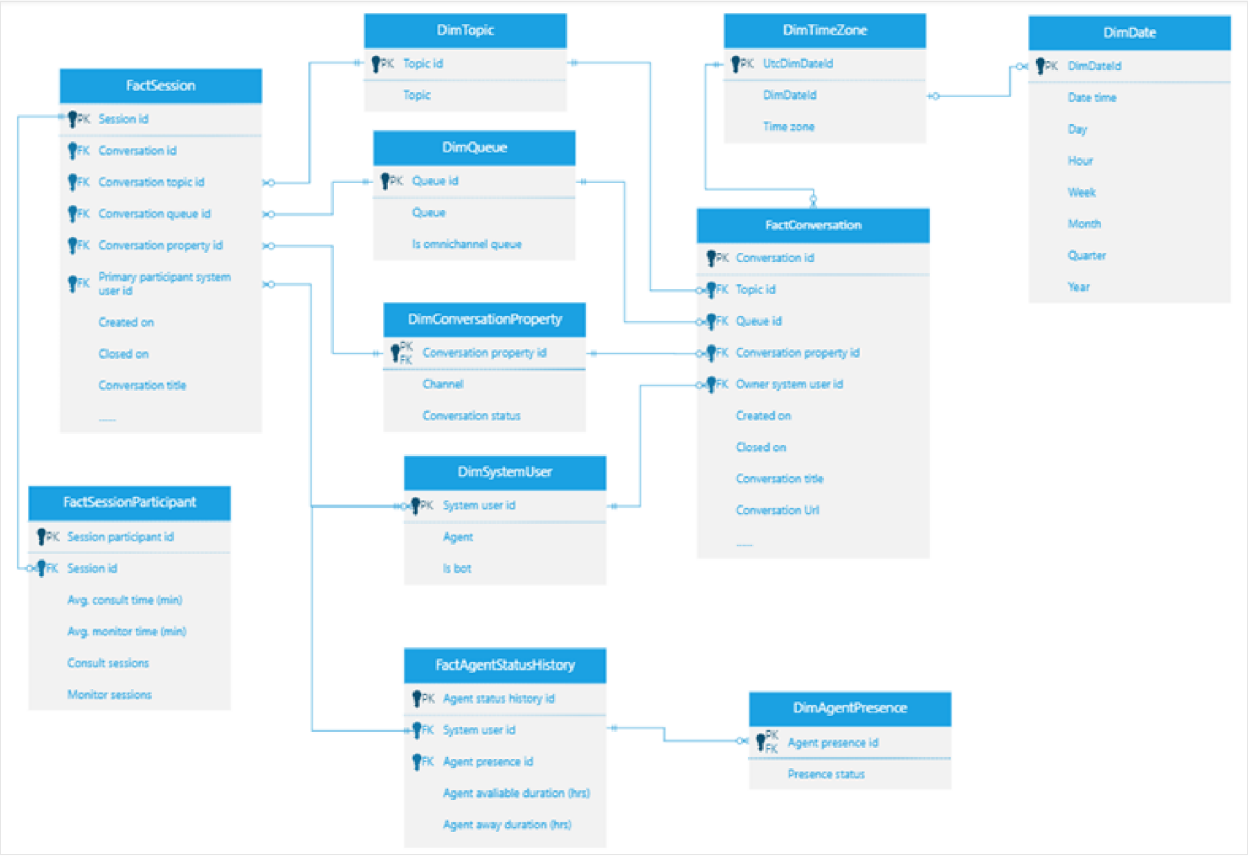
Omnichannel analytics

Edit the report mapping

Use the Dynamics_365_Customer_Service_Omnichannel_analytics.pbix file to edit the following reports:

- Conversation
- Queue
- Agent
- Topics
- Bot

Data model



Data dictionary

Entities	Attributes	Description
DimAgentPresence	Agent presence id	Primary key.
DimAgentPresence	Presence status	Agent presence status. That is, Available, Busy, Busy-DND, Away, or Offline.
DimConversationProperty	Conversation property id	Primary key.
DimConversationProperty	Channel	Channel name. The name of the channel that the conversation came through.
DimConversationProperty	Conversation status	The status of the conversation. That is, open, active, waiting, wrap up, and closed.
DimDate	Date time	Date and time. The type is Date/Time.
DimDate	Day	Day name. Example: "Fri".
DimDate	Hour	Hour. Example: "01:00", "01:30"
DimDate	Month	Month name. Example: "Apr 2021".
DimDate	Quarter	Quarter name. Example: "Q1".

Entities	Attributes	Description
DimDate	Week	Week number. Example: "1".
DimDate	Year	Year number. Example: "2021".
DimQueue	Queue id	Queue ID. Primary key of type GUID.
DimQueue	Is omnichannel queue	Whether the queue is an omnichannel queue. Currently, it's always true.
DimQueue	Queue	Queue name.
DimSystemUser	System user id	System user ID.
DimSystemUser	Agent	Name of the agent.
DimSystemUser	Is bot	Whether the system user is a bot. True or false.
DimTimeZone	Time zone	Time zone code such as GMT +01:00.
DimTopic	Topic id	Topic ID. Primary key of type GUID.
DimTopic	Topic	Topic name.
FactAgentStatusHistory	Agent status history id	Original identifier of the agent status history record from msdyn_agentstatushistory entity. Type: Guid.
FactAgentStatusHistory	System user id	Agent ID. Foreign key to DimSystemUser.
FactAgentStatusHistory	Agent logged in time	The time an agent logged in the omnichannel application per presence status.
FactAgentStatusHistory	Agent presence id	Foreign key to DimAgentPresence.
FactAgentStatusHistory	Agent available duration (hrs)	The time an agent is in the Available state in the omnichannel application.
FactAgentStatusHistory	Agent away duration (hrs)	The time an agent is in the away state in the omnichannel application.
FactAgentStatusHistory	Agent busy (DND) duration (hrs)	The time an agent is in the Busy DND state in the omnichannel application.
FactAgentStatusHistory	Agent busy duration (hrs)	Time an agent in the busy state in omnichannel application.

Entities	Attributes	Description
FactAgentStatusHistory	Agent offline duration (hrs)	The time an agent signed out of the omnichannel application.
FactAgentStatusHistory	Agent total sign-in time (hrs)	The time an agent is in each status. The column is used to calculate other measures like "Agent available duration (hrs)", "Agent away duration (hrs)".
FactConversation Conversation id	Identifier of the conversation record.	Primary key of type GUID.
FactConversation	Conversation title	Conversation title.
FactConversation	Conversation Url	Conversation URL.
FactConversation	Conversation property id	Foreign key to DimConversationProperty.
FactConversation	Owner system user id	Owner system user ID. Foreign key to DimSystemUser.
FactConversation	Queue id	Queue ID. Foreign key to DimQueue.
FactConversation	Topic id	Topic ID. Foreign key to DimTopic.
FactConversation	Is offered	Whether the conversation is initiated by the customer. Bot escalates to an agent or an agent handling customer call directly.
FactConversation	Is conversation date in past	Is conversation data in past.
FactConversation	Is outbound	Is outbound conversation.
FactConversation	Abandon rate	Abandon rate.
FactConversation	Avg. conversation hold time (min)	The total time an agent has put a customer on hold.
FactConversation	Avg. conversation sentiment	Average conversation sentiment.

Entities	Attributes	Description
FactConversation	Avg. conversation talk time (min)	The total time spent by the customer and agent talking on the voice call. It's the difference between the handle time and cumulative time in hold and after call work time.
FactConversation	Avg. conversation time (min)	Average conversation time (min).
FactConversation	Avg. conversation wrap-up time (min)	Average conversation wrap-up time (min).
FactConversation	Avg. CSAT	Avg. CSAT.
FactConversation	Avg. speed to answer (sec)	The time it took for a customer call to be answered.
FactConversation	Conversation volume	Conversation volume that is assigned to a topic.
FactConversation	Conversation volume change	Conversation volume change.
FactConversation	Created on	Date created on.
FactConversation	Closed on	Date closed on.
FactConversation	Engaged conversations	Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point.
FactConversation	Incoming conversations	The number of incoming conversations.
FactConversation	Outgoing conversations	The number of outgoing conversations.
FactConversation	Total conversations	The number of total conversations.
FactConversation	Transfer rate	The percentage of conversations that are transferred to another agent or queue.
FactConversation	Sentiment zone	Sentiment zone for the conversation.

Entities	Attributes	Description
FactConversation	Avg. conversation active time (min)	Average time when conversation is active.
FactConversation	Avg. conversation inactive time (min)	Average time when conversation is inactive.
FactConversation	Avg. customer effort time (min)	Average time for customer effort.
FactConversation	Avg. handle time (min)	Average active time for the closed conversation.
FactConversation	Avg. incoming messages	Average incoming messages.
FactConversation	Avg. outgoing messages	Average outgoing messages.
FactConversation	Conversation count	Conversation count.
FactConversation	Avg. response time (min)	Average response time up on response time of each session.
FactConversation	Avg. session per conversation	Average session count per conversation.
FactConversation	Avg. survey sentiment	Average sentiment score.
FactConversation	Avg. time for first response (min)	Average response time for first response time.
FactConversation	Avg. wait time (sec)	Average wait time.
FactConversation	Outgoing messages	Outgoing messages count.
FactConversation	Incoming messages	Incoming messages count.

Entities	Attributes	Description
FactSession	Session id	Identifier of the session record.
FactSession	Conversation id	Foreign key to FactConversation.
FactSession	Conversation title	Conversation title.
FactSession	Conversation Url	Conversation URL.
FactSession	Created on	Date created on.
FactSession	Closed on	Date closed on.
FactSession	Queue id	Queue ID. Foreign key to DimQueue.
FactSession	Topic id	Topic ID. Foreign key to DimTopic.
FactSession	Primary system user id	Primary system user ID. Foreign key to DimSystemUser.
FactSession	Is agent accepted session	Is agent accepted the session or not.
FactSession	Is agent session	Is agent session or not.
FactSession	Avg. conversation handle time (min)	Average conversation handle time (min).
FactSession	Avg. conversation hold time (min)	Average conversation hold time (min).
FactSession	Avg. conversation sentiment	Average sentiment score based on the verbatim provided in customer voice survey.
FactSession	Avg. conversation talk time (min)	Average conversation talk time (min).
FactSession	Avg. CSAT	Average CSAT.

Entities	Attributes	Description
FactSession	Avg. incoming messages	Average incoming messages.
FactSession	Avg. outgoing messages	Average outgoing messages.
FactSession	Avg. session active time (min)	Average session active time (min).
FactSession	Avg. session handle time (min)	Average session handle time (min).
FactSession	Avg. session hold time (min)	Average session hold time (min).
FactSession	Avg. session inactive time (min)	Average session inactive time (min).
FactSession	Avg. session sentiment	Average session sentiment.
FactSession	Avg. session talk time (min)	Average session talk time (min).
FactSession	Avg. session time (min)	Average session time (min).
FactSession	Avg. Speed to answer (sec)	Average speed to answer (sec).
FactSession	Avg. wait time (min)	The average time in minutes customers waited before connecting to agents. Similar to "speed to answer", but includes time waited on each session within a conversation.
FactSession	Avg. wait time (sec)	The average time in seconds customers waited before connecting to agents. Similar to "speed to answer", but includes time waited on each session within a conversation.
FactSession	Engaged conversations	The conversations that the agent was engaged in. Customer-to-agent communication can begin at this point.

Entities	Attributes	Description
FactSession	Engaged sessions	Number of sessions presented to an agent and accepted by an agent.
FactSession	Incoming conversations	Incoming conversations.
FactSession	Incoming messages	Incoming messages.
FactSession	Incoming sessions	Incoming sessions.
FactSession	Outgoing conversations	Outgoing conversations.
FactSession	Outgoing messages	Outgoing messages.
FactSession	Sentiment zone	Sentiment zone.
FactSession	Session rejected/timed out rate	Session rejected/timed out rate.
FactSession	Sessions rejected	Sessions rejected.
FactSession	Transfer rate	The number of sessions transferred by an agent.
FactSession	Bot conversations	The number of conversations handled by bot.
FactSession	Bot escalation rate	The percentage of bot conversations that have been escalated.
FactSession	Bot resolution rate	The percentage of bot conversations that have been resolved.
FactSession	Bot escalation time (min)	The average session time of the escalated bot sessions.
FactSession	Bot resolution time (min)	The average session time of the resolved bot sessions.
FactSession	Bot abandoned rate	The percentage of bot conversations that have been abandoned.

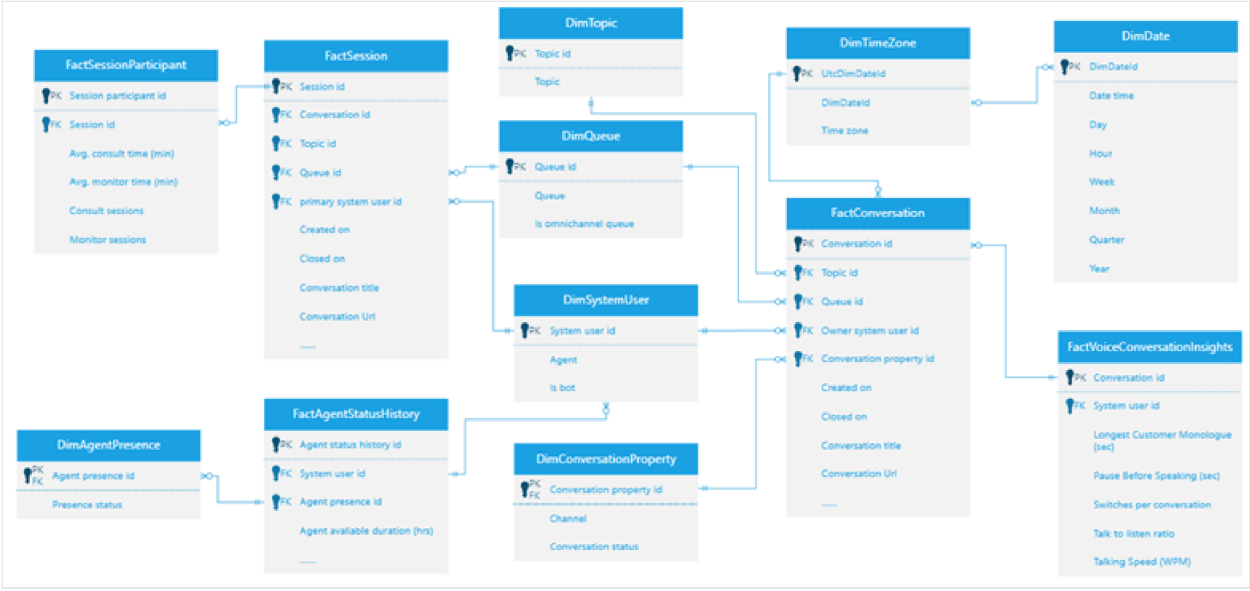
Entities	Attributes	Description
FactSession	Sessions rejected rate	The percentage of sessions that have been rejected.
FactSession	Sessions timeout rate	The percentage of sessions that timed out.
FactSession	Sessions timed out count	Session count when agent is timeout.
FactSession	Bot escalated	Number of bot conversations that have been escalated.
FactSession	Bot resolved	Number of bot conversations that have been resolved.
FactSession	Transfer count	Number of sessions that have been transferred (closure reason in 192350006 or 192350010).
FactSessionParticipant	Session participant id	Identifier of the session participant record.
FactSessionParticipant	Session id	Session ID. Foreign key to FactSession.
FactSessionParticipant	Avg. consult time (min)	The time spent on the consult from when the agent joined to when they left in session participant.
FactSessionParticipant	Avg. monitor time (min)	The time spent on the monitor from when the agent joined to when they left in session participant.
FactSessionParticipant	Consult sessions	The number of sessions accepted by a user in mode = consult.
FactSessionParticipant	Monitor sessions	The number of sessions accepted by a user in mode = monitor.

Omnichannel voice analytics

Edit the report mapping

Use the Dynamics_365_Customer_Service_Omnichannel_voice_analytics.pbix file to edit the Voice report.

Data model



Data dictionary

Entities	Attributes	Description
DimAgentPresence	Agent presence id	Primary key.
DimAgentPresence	Presence status	Agent presence status that could be "Available", "Busy", "Busy - DND", "Away", or "Offline"
DimConversationProperty	Conversation property id	Primary key
DimConversationProperty	Channel name.	The name of the channel that the conversation came through.
DimConversationProperty	Conversation status	The status of the conversation, that is, open, active, waiting, wrap up, and closed.
DimDate	Date time	Date time. The type is Date/Time.
DimDate	Day	Day name. Example: "Fri".
DimDate	Hour	Hour. Example: "01:00", "01:30"
DimDate	Month	Month name. Example: "Apr 2021".
DimDate	Quarter	Quarter name. Example: "Q1".
DimDate	Week	Week number. Example: "1".
DimDate	Year	Year number. Example: "2021".
DimQueue	Queue id	Queue id. Primary key. Type: Guid.

Entities	Attributes	Description
DimQueue	Is omnichannel queue	Currently, it's always true.
DimQueue	Queue	Queue name.
DimSystemUser	System user id	System user ID.
DimSystemUser	Agent	Name of the agent.
DimSystemUser	Is bot	Is bot. True or false.
DimTimeZone	Time zone	Time zone code. Example: GMT +01:00.
DimTopic	Topic id	Topic ID. Primary key. Type: Guid.
DimTopic	Topic	Topic name.
FactAgentStatusHistory	Agent status history id	Identifier of the agent status history record. Primary key of type GUID.
FactAgentStatusHistory	System user id	Agent ID. Foreign key to DimSystemUser.
FactAgentStatusHistory	Agent presence id	Foreign key to DimAgentPresence.
FactAgentStatusHistory	Agent available duration (hrs)	The time an agent is in the Available state in the omnichannel application.
FactAgentStatusHistory	Agent away duration (hrs)	The time an agent is in the Away state in the omnichannel application.
FactAgentStatusHistory	Agent busy (DND) duration (hrs)	The time an agent is in the Busy DND state in the omnichannel application.
FactAgentStatusHistory	Agent busy duration (hrs)	Time an agent in the busy state in omnichannel application.
FactAgentStatusHistory	Agent offline duration (hrs)	The time an agent signed out of the omnichannel application.
FactAgentStatusHistory	Agent total sign-in time (hrs)	The time an agent in each status. The column is used to calculate other measure.
FactConversation	Conversation id	Identifier of the conversation record. Primary key of type GUID.

Entities	Attributes	Description
FactConversation	Conversation title	Conversation title.
FactConversation	Conversation Url	Conversation URL.
FactConversation	Conversation property id	Foreign key to DimConversationProperty.
FactConversation	Owner system user id	Owner system user ID. Foreign key to DimSystemUser.
FactConversation	Queue id	Queue ID. Foreign key to DimQueue.
FactConversation	Topic id	Topic ID. Foreign key to DimTopic.
FactConversation	Is offered	It means whether the conversation is initiated by the customer. Bot escalates to an agent or an agent handling customer call directly
FactConversation	Is conversation date in past	Is conversation date in past.
FactConversation	Is outbound	Is outbound conversation.
FactConversation	Abandon rate	Abandon rate.
FactConversation	Avg. conversation hold time (min)	The total time an agent has put a customer on hold.
FactConversation	Avg. conversation sentiment	Avg. conversation sentiment.
FactConversation	Avg. conversation talk time (min)	The total time spent by the customer and agent talking on the voice call. It's the difference between the handle time and cumulative time in hold and after call work time.
FactConversation	Avg. conversation time (min)	Avg. conversation time (min).

Entities	Attributes	Description
FactConversation	Avg. conversation wrap-up time (min)	Avg. conversation wrap-up time (min).
FactConversation	Avg. CSAT	Avg. CSAT.
FactConversation	Avg. speed to answer (sec)	The time it took for a customer call to be answered.
FactConversation	Conversation volume	Conversation volume that's assigned to a topic.
FactConversation	Conversation volume change	Conversation volume change.
FactConversation	Created on	Date created on.
FactConversation	Closed on	Date closed on.
FactConversation	Engaged conversations	Offered conversations that are engaged by an agent. Customer-to-agent communication can begin at this point.
FactConversation	Incoming conversations	The number of incoming conversations.
FactConversation	Outgoing conversations	The number of outgoing conversations.
FactConversation	Total conversations	The number of total conversations.
FactConversation	Transfer rate	The percentage of conversations that are transferred to another agent/queue.
FactVoiceConversationInsights	Conversation id	Conversation ID. Foreign key to FactConversation.
FactVoiceConversationInsights	System user id	System user ID. Foreign key to DimSystemUser.
FactVoiceConversationInsights	Longest Customer Monologue (sec)	The longest monologue by the customer with an agent; indicates that the agent is asking good questions and understanding customer needs.
FactVoiceConversationInsights	Pause Before Speaking (sec)	The milliseconds the agent paused before responding to customer queries; indicates agent's patience.

Entities	Attributes	Description
FactVoiceConversationInsights	Switches per conversation	The average exchanges between an agent and a customer in a conversation; the number of times the conversation switched from one person to another. It's a sign of engagement during conversations.
FactVoiceConversationInsights	Talk to listen ratio	The average listen and talk ratio of agent in conversations with customers.
FactVoiceConversationInsights	Talking Speed (WPM)	The average number of words used per minute by agent.
FactSession	Session id	Identifier of the session record.
FactSession	Conversation id	Identifier of the conversation record.
FactSession	Conversation title	Conversation title.
FactSession	Conversation Url	Conversation URL.
FactSession	Created on	Date created on.
FactSession	Closed on	Date closed on.
FactSession	Queue id	Queue ID. Foreign key to DimQueue.
FactSession	Topic id	Topic ID. Foreign key to DimTopic.
FactSession	primary system user id	Primary system user ID. Foreign key to DimSystemUser.
FactSession	Is agent accepted session	Has agent accepted the session or not?
FactSession	Is agent session	Is agent session or not.
FactSession	Avg. conversation handle time (min)	Avg. conversation handle time (min)
FactSession	Avg. conversation hold time (min)	Avg. conversation hold time (min)

Entities	Attributes	Description
FactSession	Avg. conversation sentiment	The average sentiment score based on the verbatim provided in customer voice survey.
FactSession	Avg. conversation talk time (min)	Avg. conversation talk time (min)
FactSession	Avg. CSAT	Avg. CSAT
FactSession	Avg. incoming messages	Average incoming messages
FactSession	Avg. outgoing messages	Average outgoing messages
FactSession	Avg. session active time (min)	Average session active time (min)
FactSession	Avg. session handle time (min)	Average session handle time (min)
FactSession	Avg. session hold time (min)	Average session hold time (min)
FactSession	Avg. session inactive time (min)	Average session inactive time (min)
FactSession	Avg. session sentiment	Average session sentiment
FactSession	Avg. session talk time (min)	Average session talk time (min)
FactSession	Avg. session time (min)	Average session time (min)
FactSession	Avg. Speed to answer (sec)	Average Speed to answer (sec)
FactSession	Avg. wait time (min)	The average time in minutes customers waited before connecting to agents. Similar to "speed to answer", but includes time waited on each session within a conversation.

Entities	Attributes	Description
FactSession	Avg. wait time (sec)	The average time in seconds customers waited before connecting to agents. Similar to "speed to answer", but includes time waited on each session within a conversation.
FactSession	Engaged conversations	The conversations that the agent was engaged in. Customer-to-agent communication can begin at this point.
FactSession	Engaged sessions	Sessions presented to an agent and accepted by an agent
FactSession	Incoming conversations	Incoming conversations
FactSession	Incoming messages	Incoming messages
FactSession	Incoming sessions	Incoming sessions
FactSession	Outgoing conversations	Outgoing conversations
FactSession	Outgoing messages	Outgoing messages
FactSession	Sentiment zone	SentimentZone
FactSession	Session rejected/timed out rate	Session rejected or timed out rate
FactSession	Sessions rejected	Sessions rejected
FactSession	Transfer rate	The number of sessions transferred by an agent
FactSessionParticipant	Session participant id	Identifier of the session participant record
FactSessionParticipant	Session id	Session ID. Foreign key to FactSession.
FactSessionParticipant	Avg. consult time (min)	The time spent on the consult from when the agent joined to when they left in session participant.

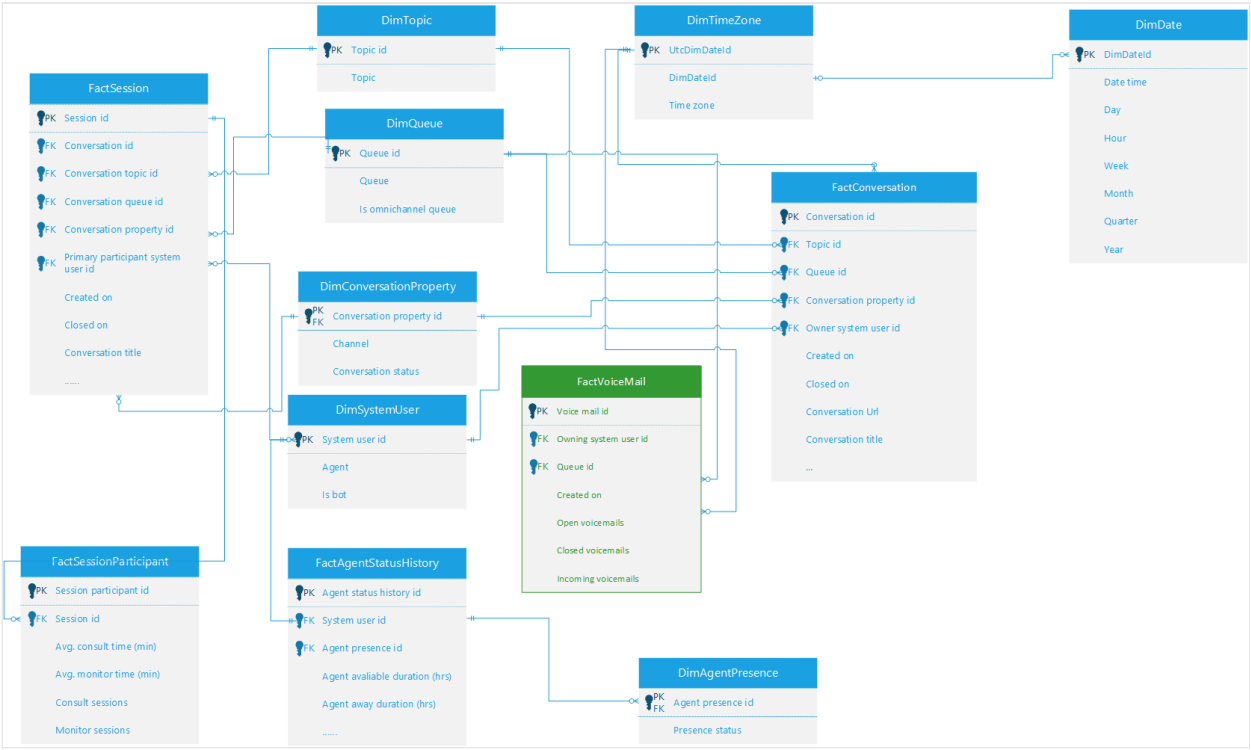
Entities	Attributes	Description
FactSessionParticipant	Avg. monitor time (min)	The time spent on the monitor from when the agent joined to when they left in session participant.
FactSessionParticipant	Consult sessions	The number of sessions accepted by a user in mode = consult.
FactSessionParticipant	Monitor sessions	The number of sessions accepted by a user in mode = monitor.

Voice mail analytics

Edit the report mapping

Use the Dynamics_365_Customer_Service_Omnichannel_Voice_Mail_analytics.pbix file to edit the Voice mail report.

Data model



Data dictionary

Entities	Attributes	Description

Entities	Attributes	Description
FactVoiceMail	Voice mail ID	Primary key.
FactVoiceMail	Owner system user ID	User ID. Foreign key to DimSystemUser.
FactVoiceMail	Queue ID	Queue ID. Foreign key to DimQueue.
FactVoiceMail	Created on	The date and time when the voice mail was created.
FactVoiceMail	Incoming voicemails	Count of the open and closed voice mails.
FactVoiceMail	Closed voicemails	Count of the closed voice mails.
FactVoiceMail	Open voicemails	Count of the open voice mails.

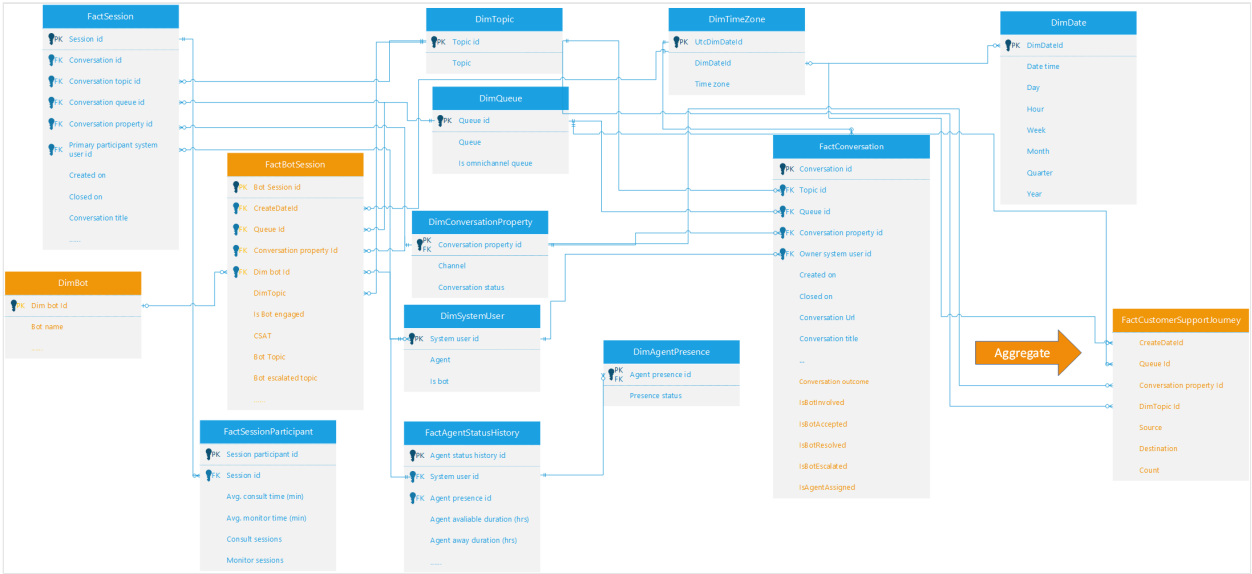
Omnichannel bot analytics

Edit the report mapping

Use the Dynamics_365_Customer_Service_Omnichannel_Bot_analytics.pbix file to edit the following reports:

- Summary
- Bot (the Bot in Dynamic_365_Customer_Service_Omnichannel_analytics will be replaced with this enhanced bot page when you turn on the **Add historical analytics for bots** option in Omnichannel historical analytics).

Data model



Data dictionary

Entities	Attributes	Description
FactConversation	Conversation outcome	Conversation outcome based on the involvement of bot and the human agent. Currently supports "bot escalated", "bot deflected", and "direct agent conversations".
DimBot	Bot ID	Bot ID
DimBot	Bot name	Bot name
FactCustomerSupportJourney	Source	The source of one step on the customer support journey graph. Examples are "interaction", "bot escalated","direct agent connection", and "agent assigned" .
FactCustomerSupportJourney	Destination	The destination of one step on the customer support journey graph.
FactCustomerSupportJourney	Total count	The total count for one step on the customer support journey, from source to destination.
FactCustomerSupportJourney	Topic ID	Topic ID. Foreign key to DimTopic.
DimConversationProperty	Conversation outcome	Conversation outcome based on the involvement of bot and the human agent. Currently supports "bot escalated", "bot deflected", and "direct agent conversations".
FactBotSession	Abandoned session rate	Abandon rate
FactBotSession	Avg. escalation time (min)	The time required by the bot to escalate.
FactBotSession	Avg. deflection time (min)	The time required by the bot deflect.
FactBotSession	Bot CSAT	CSAT score for bot at an average.
FactBotSession	Bot Id	Bot ID, PK to Dimbot
FactBotSession	Bot session ID	Bot session ID, PK
FactBotSession	Bot topic	The topic of this bot session

Entities	Attributes	Description
FactBotSession	Conversation title	The title of the associated conversation
FactBotSession	Conversation deflected	The total conversation was deflected.
FactBotSession	Conversation escalated	The total conversation was escalated.
FactBotSession	Conversation ID	Identifier of the related conversation record.
FactBotSession	Conversation URL	The URI of the related conversation.
FactBotSession	Bot deflection rate	The rate at which the conversations were deflected.
FactBotSession	Engaged sessions rate	The engagement rate of bot sessions.
FactBotSession	Bot escalated topic	The escalated topic of bot conversations.
FactBotSession	Bot escalation rate	The rate at which the conversations were escalated by the bot.
FactBotSession	Escalated sessions rate	Escalation rate based on bot sessions.
FactBotSession	Is bot engaged	Indicate if the bot is engaged in this session.
FactBotSession	Conversation queue id	Queue ID. Foreign key to DimQueue.
FactBotSession	Resolved session rate	Resolution rate based on bot sessions.
FactBotSession	Bot sessions abandoned	Bot session abandoned.
FactBotSession	Bot sessions escalated	Bot session escalated.
FactBotSession	Bot sessions engaged	Bot session engaged.

Entities	Attributes	Description
FactBotSession	Bot sessions resolved	Bot session resolved.
FactBotSession	Session Outcome	Bot session outcome.
FactBotSession	Avg. sessions per conversation	Average number of bot sessions per conversation.
FactBotSession	Bot session unengaged	Bot sessions not engaged.
FactBotSession	Total sessions	Total bot sessions.
FactBotSession	Total conversations	Total conversations associated with bots.
FactBotSession	Session ID	The related Omnichannel session ID.
FactBotSession	Topic ID	Topic ID. Foreign key to DimTopic.

See also

Customize visual display
Overview of data model customization
Customize data models of historical and real-time analytics reports
Data model mapping for real-time analytics reports in Omnichannel for Customer Service

Data model mapping for real-time analytics reports in Omnichannel for Customer Service

Article • 06/12/2023

This article describes the Data Analysis Expressions (DAX) logic for real-time metrics, which you can use to build your logic and create your own metrics. More information: DAX function reference

For details on real-time metrics, go to Use Omnichannel for Customer Service metrics

FactConversation

- Abandoned conversations

```
    SUMX (
        FactConversation,
        IF (
            FactConversation[IsAbandoned]
                && FactConversation[StatusCode] == 4
                && NOT FactConversation[DirectionCode],
            1,
            0
        )
    )
```

- Abandoned rate

```
DIVIDE (
    SUMX (
        FactConversation,
        IF (
            FactConversation[IsAbandoned]
                && NOT FactConversation[DirectionCode],
            1,
            0
        )
    ),
    SUMX (
        FactConversation,
        IF ( NOT FactConversation[DirectionCode], 1, BLANK () )
```

```
    ),
    BLANK ()
)
```

- Active conversations awaiting agent acceptance

```
SUMX (
        FactConversation,
        IF (
            FactConversation[statuscode] = 2
                && FactConversation[StatusReason] == "Agent assigned,
awaiting acceptance",
            1,
            0
        )
    )
```

- Active conversations with agent acceptance

```
SUMX (
        FactConversation,
        IF (
            FactConversation[statuscode] = 2
                && FactConversation[StatusReason] == "In conversation",
            1,
            0
        )
    )
```

- Avg. conversation first wait time (sec)

```
    AVERAGEX(FactConversation, IF(NOT
FactConversation[DirectionCode], BLANK(),
FactConversation[ConversationFirstWaitTimeInSeconds]
))
```

- Avg. conversation hold time (sec): `AVERAGE(FactConversation[ConversationHoldTimeInSeconds])`
- Avg. conversation talk time (sec): `AVERAGE(FactConversation[ConversationTalkTimeInSeconds])`

- Avg. conversation time (sec): `AVERAGE ( FactConversation[ConversationTimeInSeconds] )`
- Avg. conversation wrap up time: `AVERAGE(FactConversation[ConversationWrapUpTimeInSeconds])`
- Avg. handle time (sec): `AVERAGE(FactConversation[ConversationHandleTimeInSeconds])`
- Avg. speed to answer time (sec)

```
AVERAGEX (
    FactConversation,
    IF (
        FactConversation[IsAgentAccepted]
            && NOT FactConversation[DirectionCode],
        FactConversation[ConversationSpeedToAnswerInSeconds],
        BLANK ()
    )
)
```

- Closed conversation: `SUMX ( FactConversation, IF ( FactConversation[StatusCode] == 4, 1, 0 ) )`
- Conversation first wait time (sec)

```
SUMX (
    FactConversation,
    IF (
        NOT FactConversation[DirectionCode],
        FactConversation[ConversationFirstWaitTimeInSeconds],
        BLANK ()
    )
)
```

- Conversation handle time (sec): `SUM(FactConversation[ConversationHandleTimeInSeconds]`
- Conversations in queue

```
Conversations in queue =
    SUMX (
        FactConversation,
        IF (
            NOT FactConversation[DirectionCode]
                && ( FactConversation[StatusCode] == 1
```

```
                || ( FactConversation[StatusCode] == 2
                && FactConversation[StatusReason] == "Agent assigned,
awaiting acceptance" ) ),
            1,
            0
        )
    )
```

- Incoming conversation

```
SUMX ( FactConversation, IF ( NOT
FactConversation[DirectionCode], 1, 0 ) )
```

- Longest wait time (sec)

```
AXX(FactConversation, IF(NOT
FactConversation[DirectionCode],
FactConversation[CurrentWaitTimeInSeconds], BLANK()))
```

- Ongoing conversations

```
SUMX ( FactConversation, IF (
 FactConversation[IsOngoing], 1, 0 ) )
```

- Open conversations

```
SUMX ( FactConversation, IF (
 FactConversation[statuscode] == 1, 1, 0 ) )
```

- Service level (10 seconds)

```
DIVIDE (
    SUMX (
        FactConversation,
        IF (
            FactConversation[ConversationFirstWaitTimeInSeconds] <= 10
                && FactConversation[IsAgentAccepted]
```

```
                && NOT FactConversation[DirectionCode],
            1,
            0
        )
    ),
    SUMX (
        FactConversation,
        IF (
            FactConversation[IsAgentAccepted]
                && NOT FactConversation[DirectionCode],
            1,
            0
        )
    ),
    BLANK ()
)
```

- Total conversations: `COUNTROWS(FactConversation)`
- Waiting conversations

```
SUMX ( FactConversation, IF (
FactConversation[statuscode] == 3, 1, 0 ) )
```

- Wrap-up conversations

```
 SUMX ( FactConversation, IF (
FactConversation[statuscode] == 5, 1, 0 ) )
```

FactSession

- Active sessions: `SUMX(FactSession, IF(FactSession[SessionStateCode] = 192350001, 1, 0))`
- Avg. session handle time (sec): `AVERAGE(FactSession[AgentHandlingTimeInSeconds])`
- Closed sessions: `SUMX(FactSession, IF(FactSession[SessionStateCode] = 192350002, 1, 0))`
- Engaged sessions: `SUMX(FactSession, IF(ISBLANK(FactSession[AgentAcceptedOn]), 0, 1))`

- Rejected sessions: `SUMX(FactSession, IF(FactSession[SessionClosureReasonCode] == 192350001, 1, 0))`
- Session handle time (sec): `SUM(FactSession[AgentHandlingTimeInSeconds])`
- Session rejection rate

```
DIVIDE (
    SUMX (
        FactSession,
        IF ( FactSession[SessionClosureReasonCode] == 192350001, 1, 0 )
    ),
    SUMX (
        FactSession,
        IF ( FactSession[SessionStateCode] == 192350002, 1, BLANK () )
    ),
    BLANK ()
)
```

- Session time to accept (sec): `SUM(FactSession[TimeToAcceptInSeconds])`
- Session time to reject (sec): `SUM(FactSession[TimeToRejectInSeconds])`
- Session timeout rate

```
DIVIDE (
    SUMX (
        FactSession,
        IF ( FactSession[SessionClosureReasonCode] == 192350002, 1, 0 )
    ),
    SUMX (
        FactSession,
```

```
        IF ( FactSession[SessionStateCode] == 192350002, 1, BLANK () )
    ),
    BLANK ()
)
```

- Session transfer rate

```
DIVIDE (
    SUMX ( FactSession, IF ( FactSession[IsTransferredOut], 1, 0 ) ),
    SUMX (
        FactSession,
        IF ( ISBLANK ( FactSession[AgentAcceptedOn] ), BLANK (), 1 )
    ),
    BLANK ()
)
```

- Session wait time (sec): `SUM(FactSession[SessionWaitTimeInSeconds])`
- Timeout sessions

```
SUMX(FactSession, IF(FactSession[SessionStateCode] = 192350002 &&
FactSession[SessionClosureReasonCode] = 192350002, 1, 0))
```

- Total sessions: `COUNTROWS()`
- Transferred sessions: `SUMX ( FactSession, IF ( FactSession[IsTransferredOut], 1, 0 ) )`

FactSessionParticipant

- Session participant count: `COUNTROWS(FactSessionParticipant)`

FactAgentStatusHistory

- Status duration (mins)

```
CALCULATE (

    SUM ( FactAgentStatusHistory[DuringInSeconds] ) / 60.00,

    USERELATIONSHIP ( FactAgentStatusHistory[PresenceId],
DimAgentPresence[PresenceId] )

)
```

FactAgentCapacityProfile

- Assigned capacity profile count

```
SUMX (

        FactAgentCapacityProfile,

        IF ( NOT RELATED ( DimAgentPresence[BasePresenceStatusId] ) ==
192360004, 1, 0 )

    )
```

- Available capacity

```
SUMX (

        FactAgentCapacityProfile,

        IF (

            NOT RELATED ( DimAgentPresence[BasePresenceStatusId] ) ==
192360004,

            FactAgentCapacityProfile[AvailableProfileUnits],

            0

        )
```

```
    )
```

- Total capacity: `SUM ( FactAgentCapacityProfile[DefaultMaxProfileUnits] )`
- Total work item capacity in use: `SUM ( FactAgentCapacityProfile[OccupiedProfileUnits] )`

FactAgentCapacityUnit

- Logged in agents

```
SUMX (

        FactAgentCapacityUnit,

        IF ( NOT RELATED ( DimAgentPresence[BasePresenceStatusId] ) ==
192360004, 1, 0 )

    )
```

- Total agents: `COUNTROWS ( FactAgentCapacityUnit )`
- Total capacity: `SUM ( FactAgentCapacityUnit[DefaultMaxCapacityUnits] )`
- Units available

```
SUMX (

        FactAgentCapacityUnit,

        IF (

            NOT RELATED ( DimAgentPresence[BasePresenceStatusId] ) ==
192360004,

            FactAgentCapacityUnit[AvailableCapacityUntis],

            0

        )

    )
```

- Units occupied: `SUM ( FactAgentCapacityUnit[OccupiedCapacityUnits] )`

FactConversationMessageBlock

- Agent response service level (60 seconds)

```
DIVIDE (
    SUMX (
        FactConversationMessageBlock,
        IF (
FactConversationMessageBlock[ReponseTimeInSecondsAdjustedForOperationHour]
<= 60,
            1,
            0
        )
    ),
    COUNTROWS ( FactConversationMessageBlock ),
    BLANK ()
)
```

- Average agent response time (sec): `AVERAGE( FactConversationMessageBlock[AgentReponseTimeInSecondsAdjustedForOperationHour ])`
- Average first response time (sec)

```
AVERAGEX (
    FactConversationMessageBlock,
    IF (
        FactConversationMessageBlock[IsFirstResponseTime],
FactConversationMessageBlock[ReponseTimeInSecondsAdjustedForOperationHour],
```

```
        BLANK ()
    )
)
```

- First response time

```
DIVIDE (
    SUMX (
        FactConversationMessageBlock,
        IF (

FactConversationMessageBlock[ReponseTimeInSecondsAdjustedForOperationHour]
<= 60
                && FactConversationMessageBlock[IsFirstResponseTime],
            1,
            BLANK ()
        )
    ),
    SUMX (
        FactConversationMessageBlock,
        IF ( FactConversationMessageBlock[IsFirstResponseTime], 1, BLANK ()
)
    ),
    BLANK ()
)
```

See Also

Customize visual display

Data models and report mappings for historical analytics reports in Customer Service

Overview of data model customization
Customize data models of historical and real-time analytics reports

Dataverse entities used in historical and real-time analytics

Article • 07/20/2023

The article describes the Dataverse entities used in historical and real-time analytics.

Entities used in historical analytics

- msfp_question
- msfp_questionresponse
- msfp_surveyresponse
- organization
- appmodule
- systemuser
- queue msdyn_conversationtopic
- msdyn_conversationtopic_conversation
- msdyn_ocliveworkitem
- msdyn_ocliveworkitemsentiment
- msdyn_ocsession
- msdyn_ocsessionsentiment
- msdyn_sessionparticipant
- msdyn_transcript
- systemuserroles
- msdyn_agentstatushistory
- annotation
- queuemembership
- msdyn_personasecurityrolemapping
- role
- msdyn_presence
- msdyn_liveworkstream
- msdyn_conversationtopicsetting
- account
- msdyn_conversationinsight
- msdyn_ocsessionparticipantevent
- incident
- subject
- incidentresolution
- msdyn_casetopic

- msdyn_casetopic_incident
- msdyn_casetopicsetting
- queueitem
- bot
- msdyn_botsession
- msdyn_ocvoicemail
- queueitem
- msdyn_copilotinteraction
- email

Entities used in real-time analytics

- queuemembership
- queue
- msdyn_agentcapacityprofileunit
- msdyn_capacityprofile
- msdyn_presence
- msdyn_agentstatus
- systemuser
- msdyn_liveworkstream
- msdyn_ocliveworkitem
- msdyn_agentstatushistory
- msdyn_ocsession
- msdyn_sessionparticipant
- msdyn_conversationmessageblock
- ratingvalue
- characteristic
- bookableresource
- bookableresourcecharacteristic
- msdyn_ocliveworkitemcharacteristic
- choiceLabel (new entity for option set in real-time)

Next steps

Use the out-of-the-box data model in your custom reports
Customize data models of historical and real-time analytics reports

Customize KPIs for intraday insights

Article • 05/18/2023

> **Note**
>
> Intraday insights reports for Omnichannel for Customer Service are deprecated as of May 1, 2023. We recommend that you use **real-time analytics reports**, our latest analytics capability, which provide real-time information about the health and key performance indicators of your organization. For more information on the deprecation, go to **Intraday insights for Omnichannel for customer service are deprecated**.

To cater to your organizational needs, intraday insights allows you to customize KPIs. This allows supervisors to adapt to your organizational parameters that are designed for your organization. Through the Power BI desktop application, you can customize these KPIs.

> **Note**
>
> Do not customize out-of-the-box reports because they will be overwritten when new versions are made available by Microsoft. However, if you do customize them, save them with another name.

The customization of KPIs includes:

- Add custom KPIs
- Edit measures and visuals of existing KPIs

Review prerequisites

Verify the following prerequisites before you add the custom KPIs:

1. Power BI desktop app is installed on your computer.
2. Administrator or equivalent role is assigned to you.
3. Intraday insights dashboard is configured for your organization. To Learn more, see Configure to view intraday insights dashboard

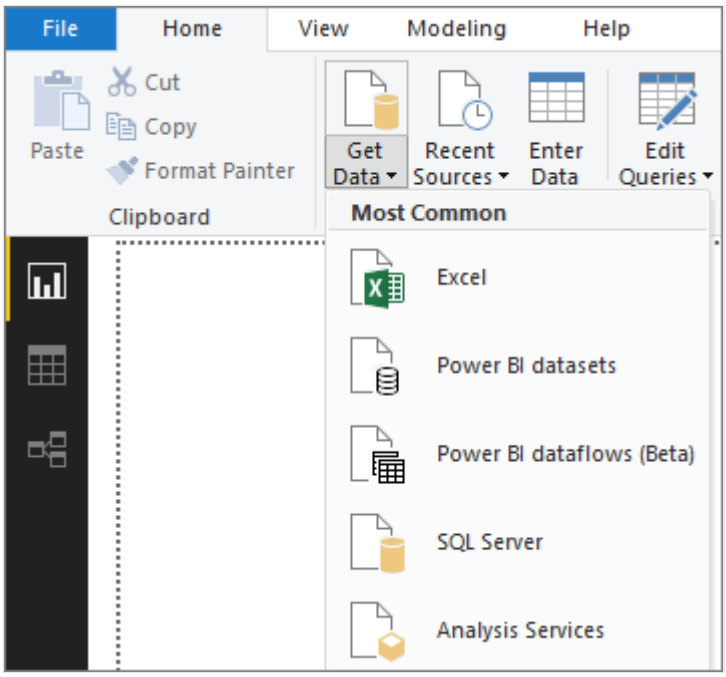
Add custom KPIs

You can add the custom KPIs that are specific to your organization to intraday insights. This allows intraday insights to be more specific and helps supervisors adhere your organizational requirements. To add custom KPIs, follow these steps:

1. Review the prerequisites.

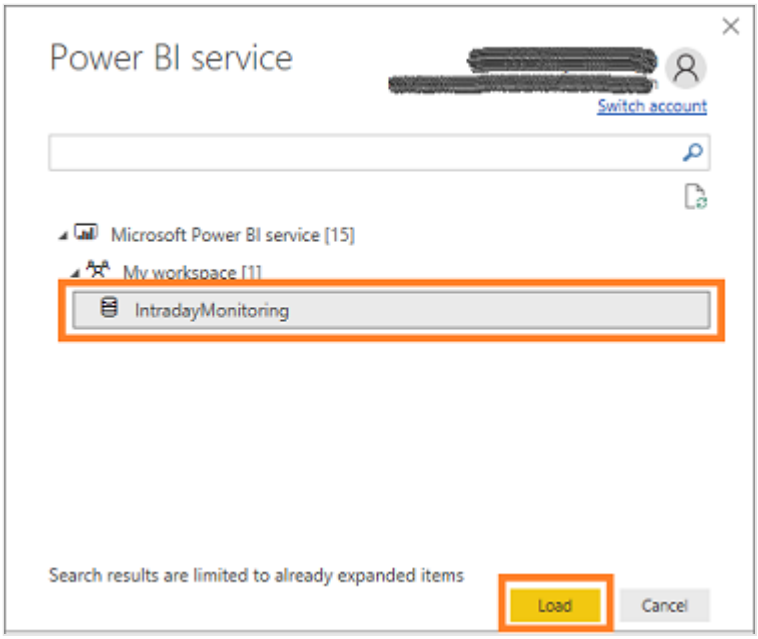
2. Open the Power BI desktop application and sign in with your administrator credentials.

3. From the **Home** menu, select **Get Data** > **Power BI datasets**.



   The dataset selection dialog box opens.

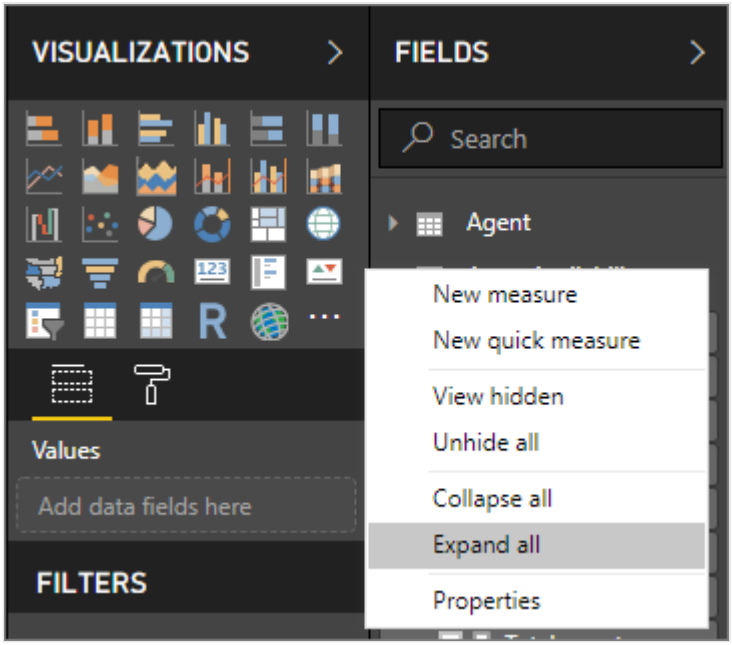
4. Select **IntradayMonitoring** from the workspace that you've created through configuration (Configure Power BI workspace in Omnichannel Administration app), and then select **Load**.



The fields related to intraday insights are loaded.

5. From the field category list, select a category to create a measure and then select **More options** (...) > **New measure**.

   In this example, we're creating a measure for the field category **AgentAvailability**.



   A new measure is created for the field.

6. The formula bar appears along the top of the Report canvas, where you can rename your measure and enter a DAX formula.

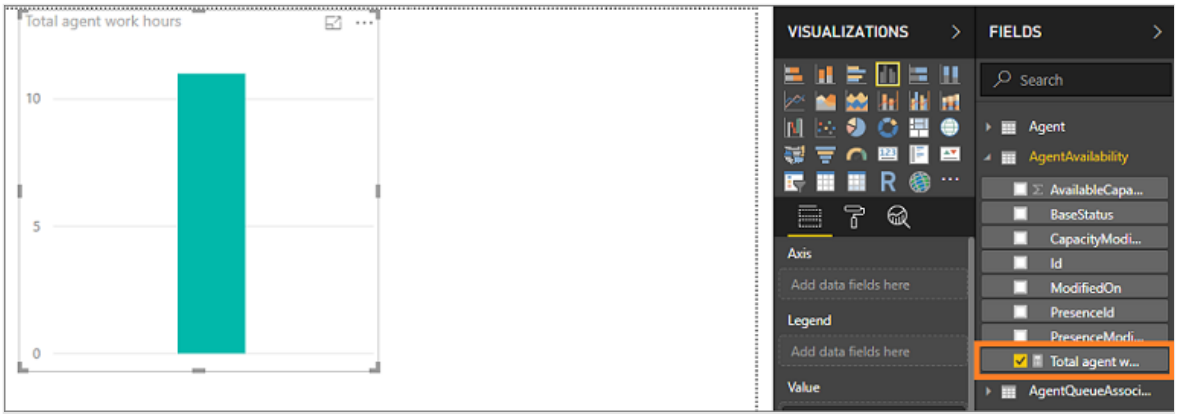
   In this example, we're adding a measure for calculating the total number hours that an agent is working on a work item.

```
```

```
Total agent work hours = Agent[Average Session Handling Time] +
Agent[Average Conversations Per Online Agents]
```

The measure is added.

7. Select the measure and verify that the measure is working as defined.



To learn more about creating measure, see Create a measures.

8. Add the measure to your report. To learn more, see Use your measure in the report.

9. Publish the report.

The custom KPI measure is added to the intraday insights dashboard.

To learn more about how to create custom measures, see Tutorial: Create your own measures in Power BI Desktop.

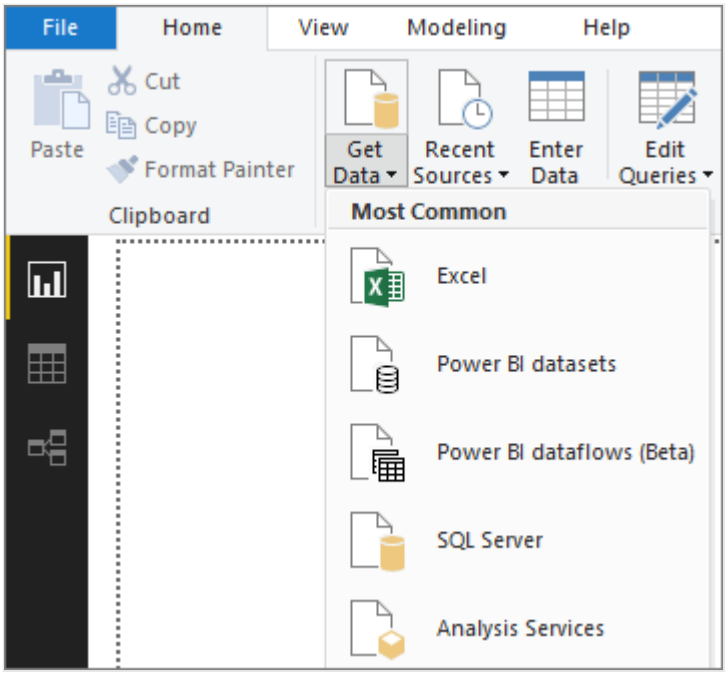
Edit measures and visuals of existing KPIs

You can edit the measures and visuals of existing custom and out-of-the-box KPIs to match your organizational requirements. This helps in reducing the effort of adding a new KPI to the intraday insights. To edit measures of existing KPIs, follow these steps:

1. Review the prerequisites.

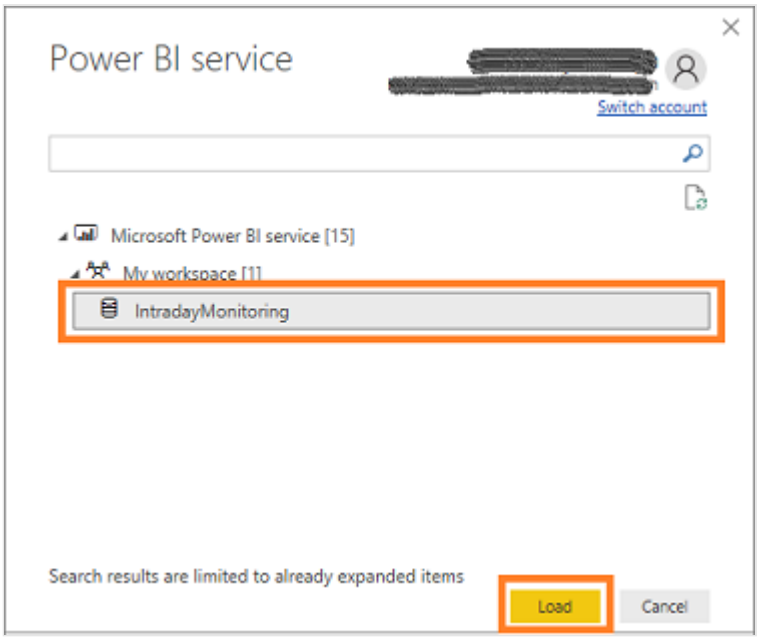
2. Open the Power BI desktop application and sign in with your administrator credentials.

3. From the **Home** menu, select **Get Data** > **Power BI datasets**.



The dataset selection dialog box opens.

4. Select **IntradayMonitoring** from the workspace that you've created through configuration (Configure Power BI workspace in Omnichannel Administration app), and then select **Load**.



The fields related to intraday insights are loaded.

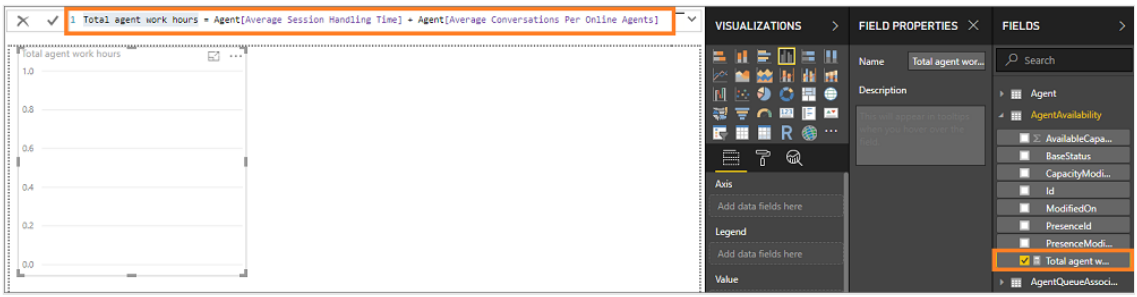
5. To edit a measure:

   a. From the field category list, select a category and then select the field for which you want to change the measure.

> ⓘ Note

Fields with measures are preceded with a calculator icon.

In this example we're selecting **Total agent work hours** field from **AgentAvailability** category. The details of for the field is displayed including its formula bar.



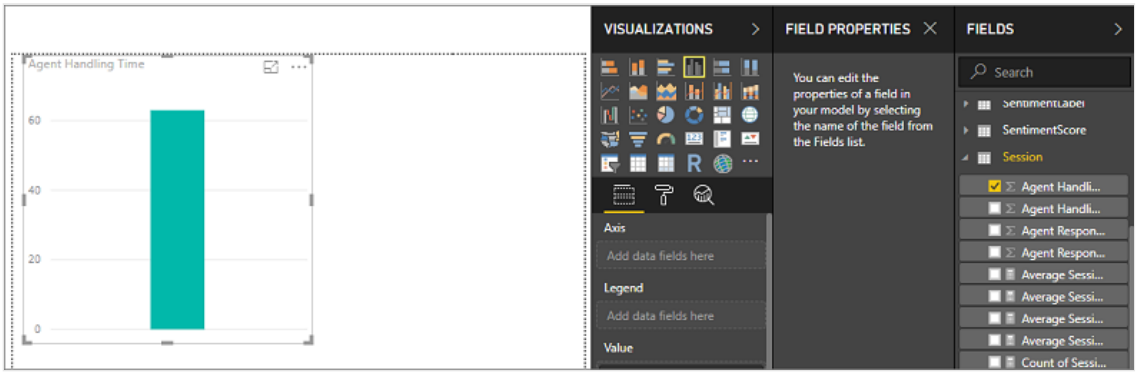
b. From the formula bar, edit the formula as required.

To learn more about change visualizations, see Create and use your own measures.

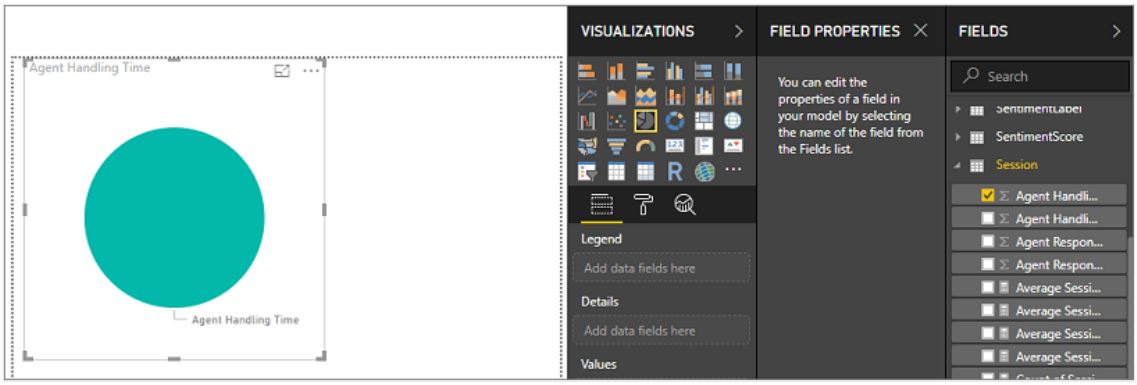
6. To edit a visual:

a. From the field category list, select a category and then select the field for which you want to change the visual.

In this example we're selecting **Agent Handling Time** field from **Session** category. The visual for the field is displayed.



b. From the **VISUALIZATIONS** tab, edit the visualizations of the field as required. In this example, we're changing the chart to a pie chart.



To learn more about change visualizations, see Add visualizations to a Power BI report.

7. Publish the report.

Reference

The tables in the intraday insights dataset consists of entity attributes along with measures and calculated columns. The following are the list of entity that is supported in Intraday insights:

- **Agent**. To learn more about entity attributes for agent, see SystemUser entity.
- **AgentAvailability**. To learn more about entity attributes for agent availability, see SystemUser entity and msdyn_presence.
- **AgentQueueAssociation**. To learn more about entity attributes for agent queue association, see SystemUser entity and Queue Entity.
- **AgentRoleAssociation**. To learn more about entity attributes for agent role association, see SystemUser entity and role EntityType.
- **Presence**. To learn more about entity attributes for presence, see msdyn_presence Entity Reference - Writable attributes.
- **Queue**. To learn more about entity attributes for queue, see Queue Entity.
- **RoleBase**. To learn more about entity attributes for role base, see role EntityType.
- **Session**. To learn more about entity attributes for session, see msdyn_ocsession Entity Reference.
- **SessionParticipant**. To learn more about entity attributes for session participant, see msdyn_sessionparticipant Entity Reference.

- **WorkItem**. To learn more about entity attributes for work item, see msdyn_ocliveworkitem Entity Reference.
- **WorkStream**. To learn more about entity attributes for work stream, see msdyn_liveworkstream Entity Reference.

See also

Configure to view intraday insights dashboard

Customize interactive dashboards that are based on Unified Interface

Article • 03/25/2022

Dashboards overview

Customer Service Hub provides a modern, intuitive, and interactive experience for managing your customer service operations. For service reps, the interactive dashboards are a one-stop workplace to see what's important and take actions.

Dashboards pull together key information, so customer service representatives can focus on what's important to them and get things done faster. The dashboards are fully configurable, security-role based, and deliver workload information across multiple streams.

For more information about dashboards, see Use interactive dashboards to effectively manage service cases in the Customer Service Hub

> ⓘ **Note**
>
> The interactive dashboards are solution aware and can be exported and then imported into a different environment as a solution. However, the queues that the streams and tiles are based on aren't solution aware. Before importing the dashboard solution into the target system, the queues must be manually created in the target system in **Settings** > **Service Management** > **Queues**. After you create the queues, import the dashboard solution to the target system, and then edit the streams or tiles that are based on the queues to assign the newly created queues appropriately.

The illustrations in this article show multistream and single-stream dashboards with the header pane. Below the header you see visual filters and streams. In the single-stream dashboard, you also see tiles. For each dashboard type, you can choose from several different layouts that are also shown. The dashboard header contains the following controls and clickable icons, from left to right: dashboard picker, refresh, visual filter icon, global filter icon, and timeframe filter.

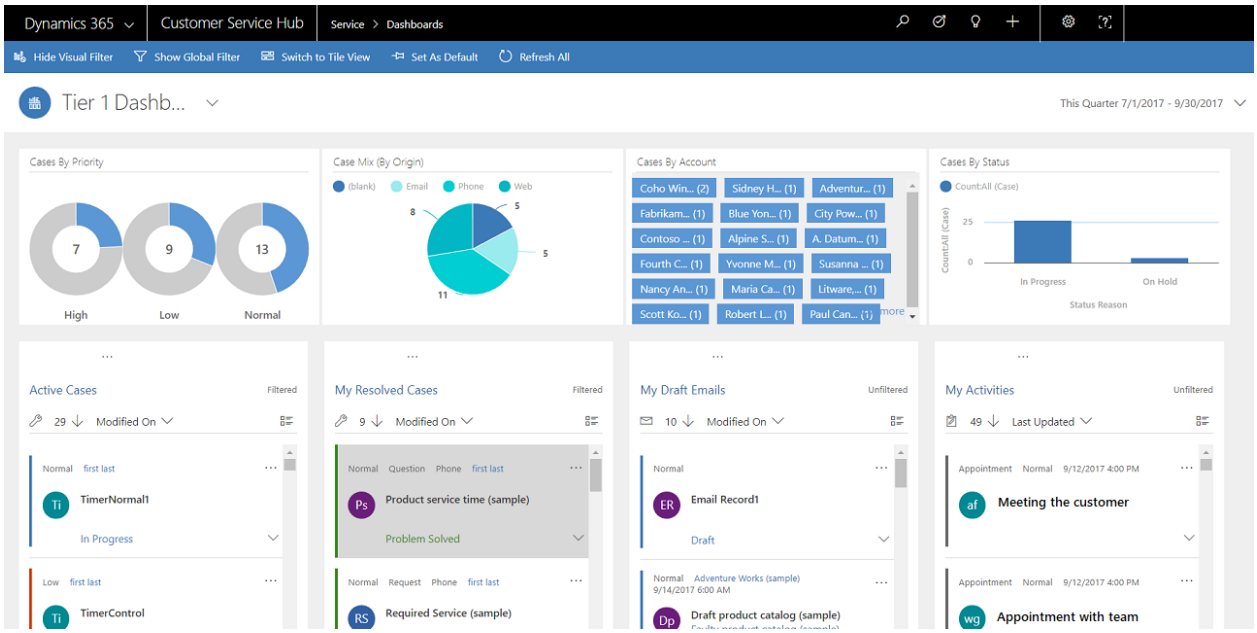
The interactive dashboards come in two flavors:

- Multistream dashboards

- Single-stream dashboards

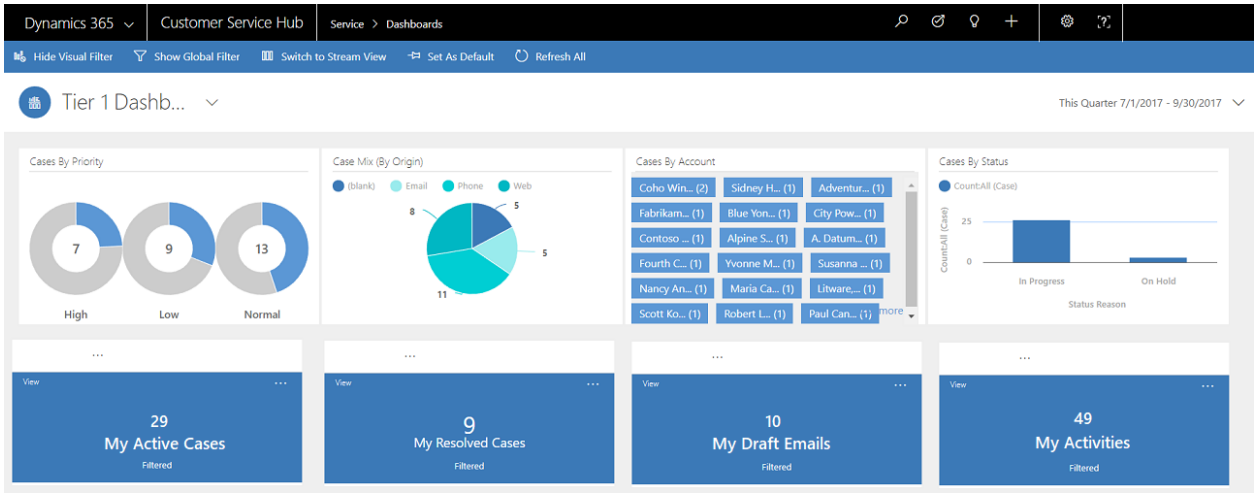
Multistream dashboard standard view

In the multistream dashboard, you see a row of visual filters at the top with the data streams below them.



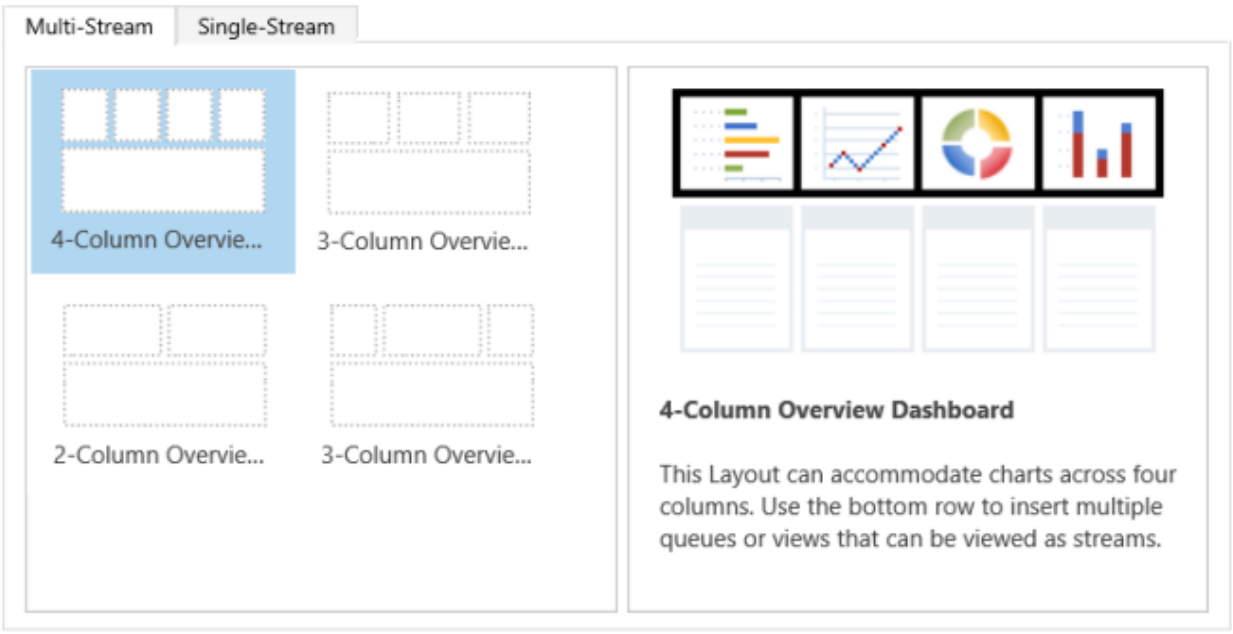
Multistream dashboard tile view

Multistream dashboard in tile view.



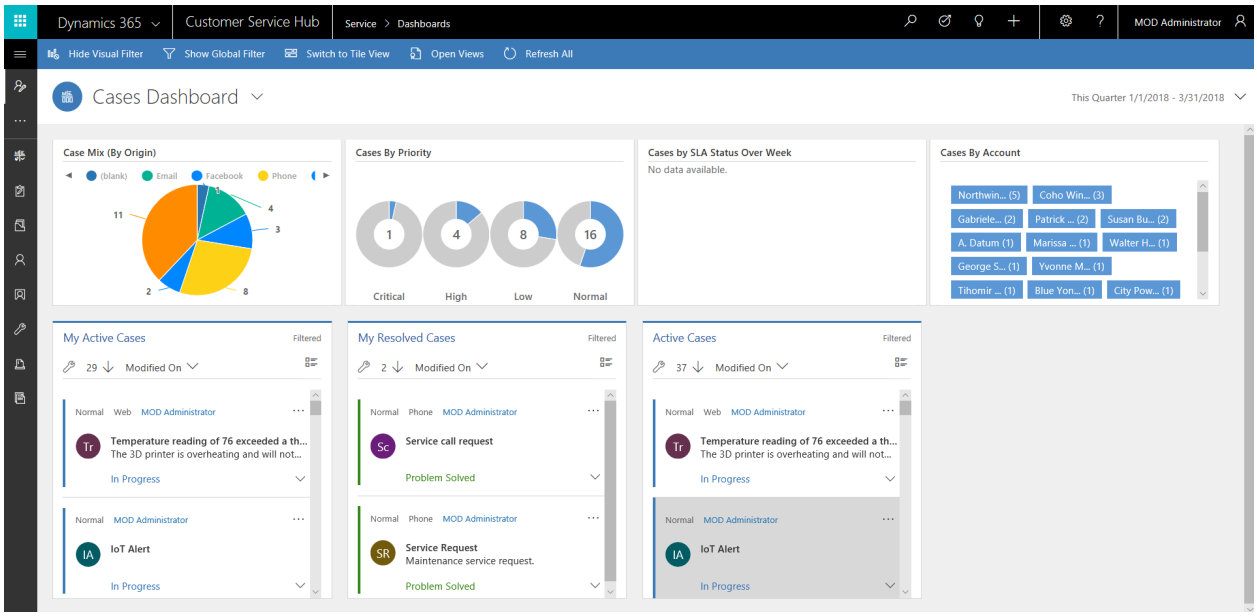
Multistream dashboard layouts

For multistream dashboards, you can choose from four different layouts.



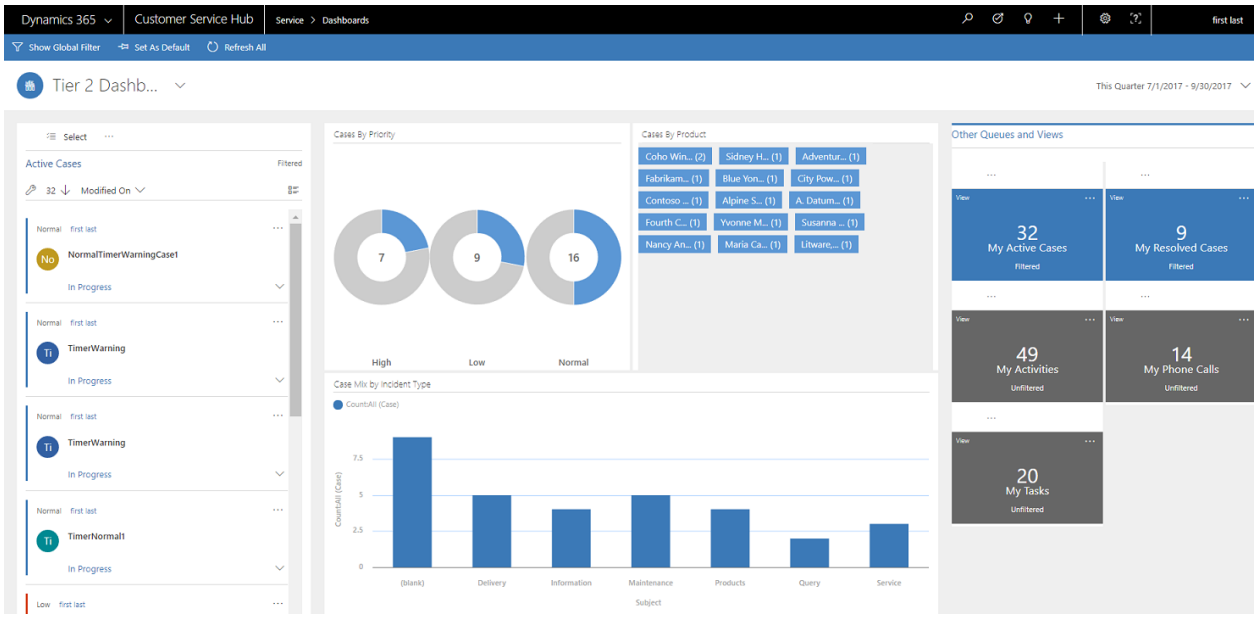
Multistream entity-specific dashboard

The entity-specific dashboard for the **Case** entity is shown here.



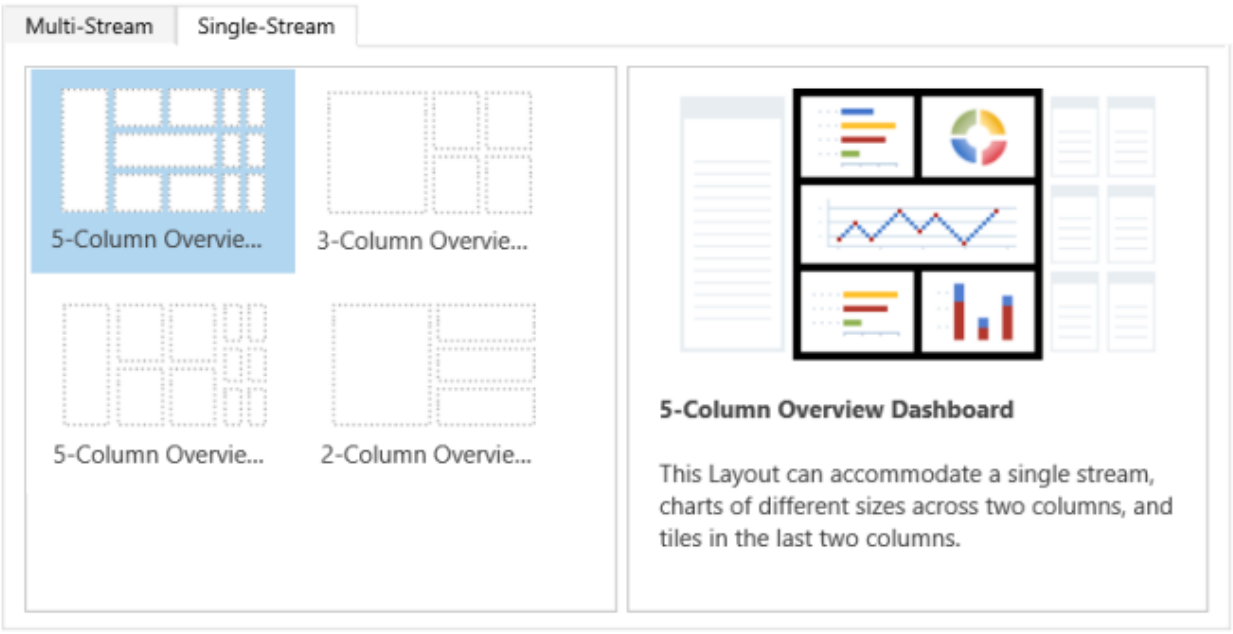
Single-stream dashboard

The single-stream dashboard contains the data stream on the left and visual filters and tiles on the right.



Single-stream dashboard layouts

For single-stream dashboards, you can choose from four different layouts.



Configure filter fields and security roles for the interactive dashboards

When you configure interactive dashboards, your first task is to enable fields and security roles, so that interactive dashboards can be configured for them. Note, that interactive dashboards are now enabled for all entities and custom entities by default.

To know more about how to enable custom entities, see Enable custom entities in the Customer Service Hub.

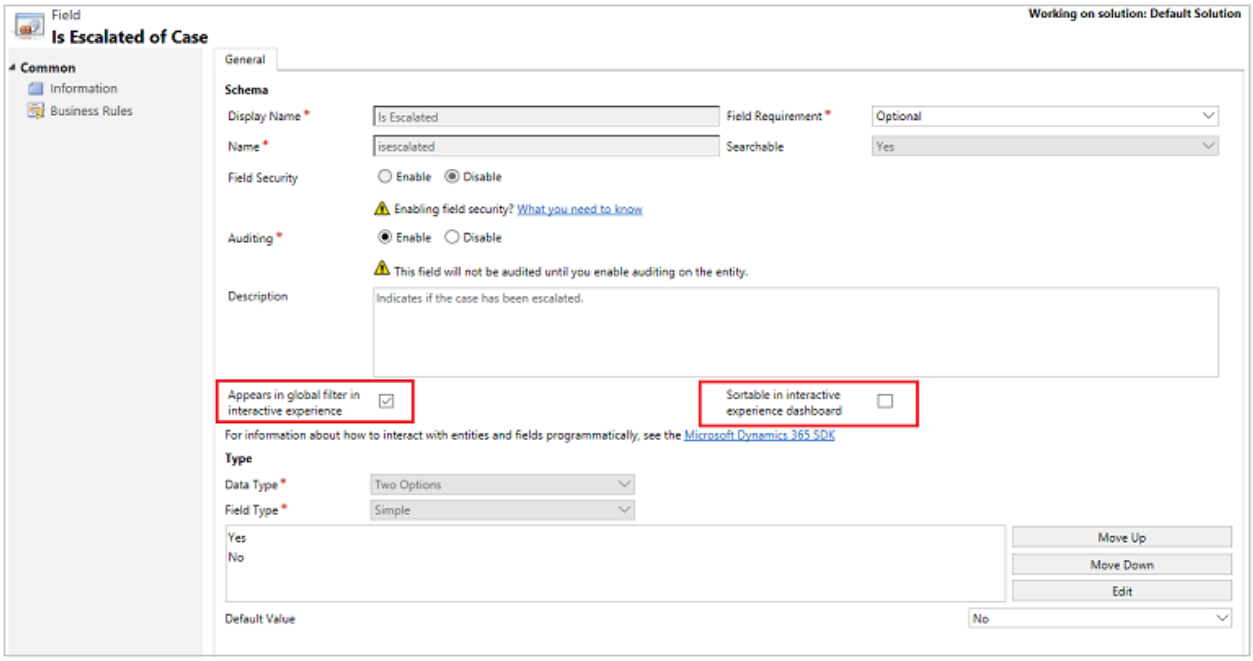
> ⓘ Note
>
> All customization tasks for the Customer Service Hub must be done in Microsoft Dataverse.

Configure filter fields

For a field to appear in the global filter and to be included in the data stream sort, you must set two flags:

- Appears in global filter in interactive experience
- Sortable in interactive experience dashboard

Refer the screen below to see the two flags enabled in the **Case** entity for the **IsEscalated** field:



Configure the flag "Appears in global filter in interactive experience"

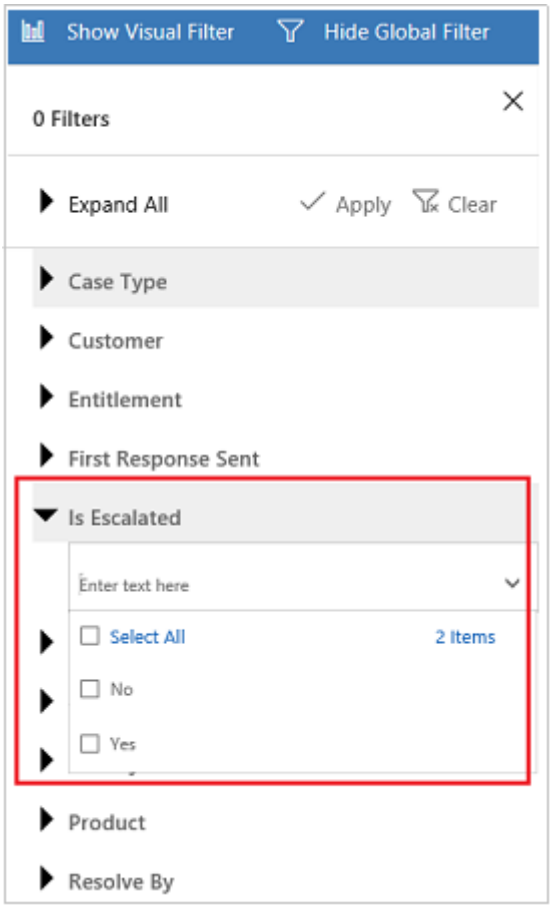
1. Go to **Settings** > **Customizations**.
2. Select **Customize the System**.
3. Under **Components**, expand **Entities**, and then expand the entity you want.
4. In the navigation pane, select **Fields** and in the grid, double-click the field you want to enable.

5. In the **General** tab, select the **Appears in global filter in interactive experience** check box. Select **Save and Close**.

6. Select **Publish All Customizations** for your changes to take effect.

The fields that you configure will appear in the global filter flyout window when the global filter icon is selected from the dashboard header. In the flyout window, the service reps can select the fields on which they want to filter globally, in charts, and also in streams and tiles that are based on the filter entity.

The global filter flyout window is shown here:



> **Tip**
>
> When you configure a visual filter based on the fields like priority or status, a best practice is to also enable these fields (priority, status) to appear in the global filter.

Configure the flag "Sortable in interactive experience dashboard"

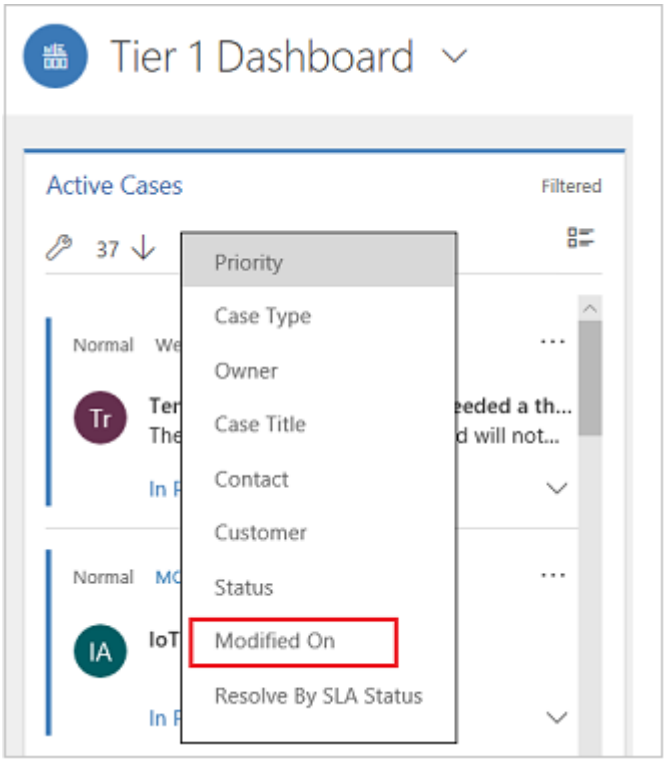
1. Go to **Settings** > **Customizations**.

2. Select **Customize the System**.

3. Under **Components**, expand **Entities**, and then expand the entity you want.
4. In the navigation pane, select **Fields** and in the grid, double-click the field you want to enable.
5. In the **General** tab, select the **Sortable in interactive experience dashboard** check box. Select **Save and Close**.
6. Select **Publish All Customizations** for your changes to take effect.

The fields that you configure for sorting will appear when you select the drop-down list on the stream header.

The following illustration shows the flyout dialog with the list of the available fields for sorting, in the drop-down list. The default sort is always set on the **Modified On** field.



Enable security roles

Select and enable security roles that will be able to view the interactive dashboards.

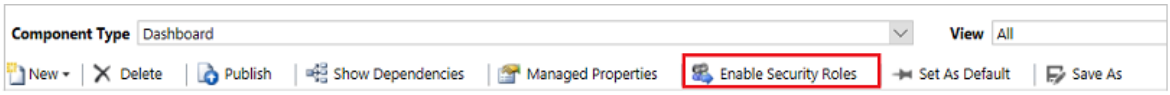
To enable the security roles

1. Go to **Settings** > **Customizations**.
2. Select **Customize the System**.
3. Under **Components**, select **Dashboards**.

4. In the grid, select the interactive dashboard you want and select **Enable Security Roles** on the task bar.

5. In the **Assign Security Roles** dialog, select the **Display only to these selected security roles** option and select the roles that you want to enable. Select **OK**.

6. Select **Publish All Customizations** for your changes to take effect.



Configure interactive dashboards

The following sections describe how to configure various types of interactive dashboards.

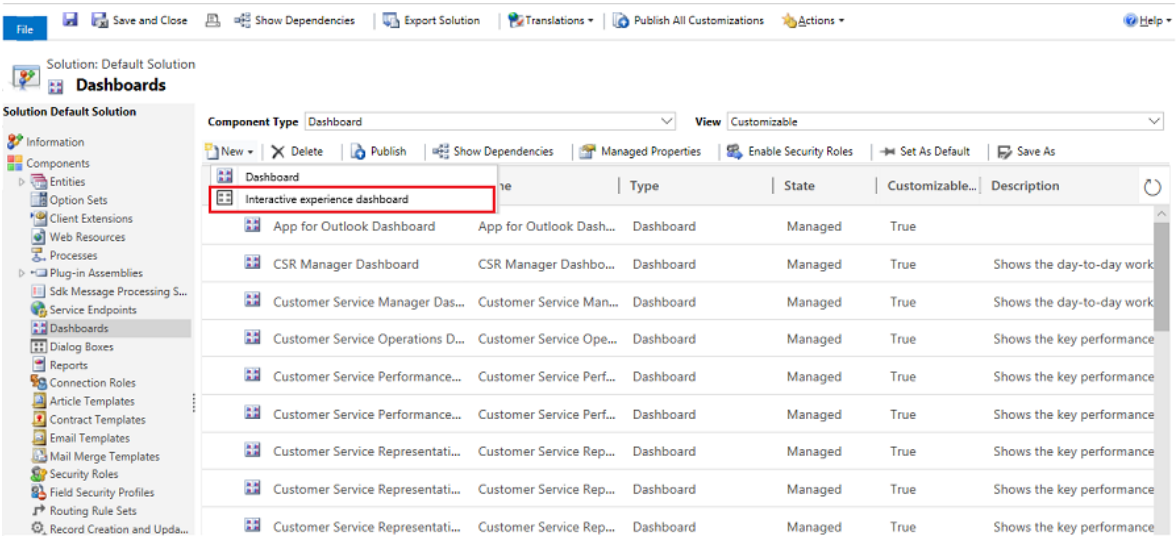
Configure a multistream interactive dashboard using the 4-column layout

1. Go to **Settings** > **Customizations**.

2. Select **Customize the System**.

3. Under **Components**, select **Dashboards**.

4. In the grid, select **New**, and select **Interactive experience dashboard** in the drop-down list, as shown below:



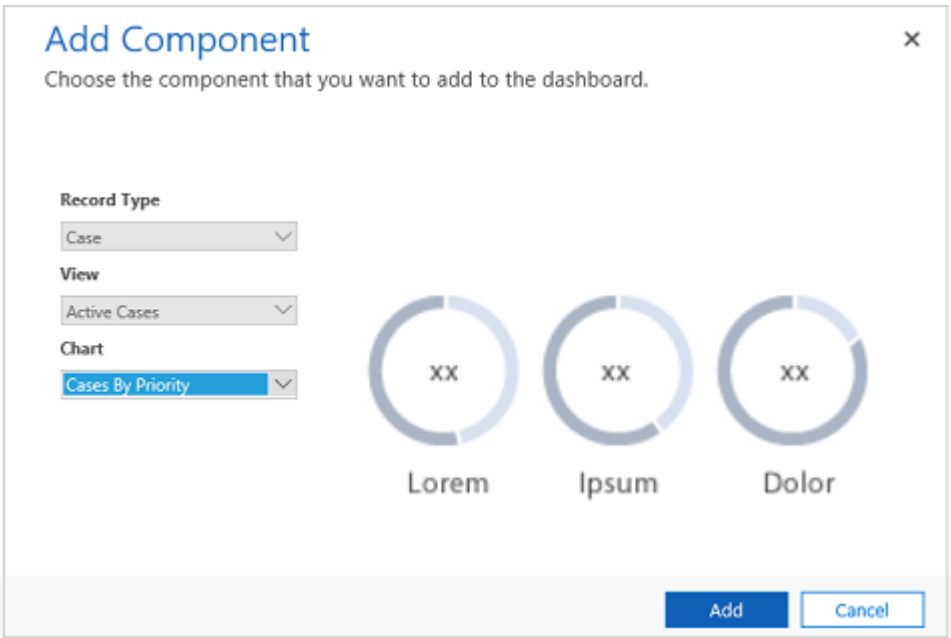
5. Choose the layout and select **Create**.

6. When the dashboard form opens, fill in the filtering information at the top of form, as shown here.

- **Filter Entity**: The visual filters and global filter attributes are based on this entity.
- **Entity View**: The visual filters are based on this view.
- **Filter By**: The field that the time frame filter applies to.
- **Time Frame**: The default time frame filter value for the **Filter By** field.

After you have specified the filtering information, start adding components for the charts and the data streams in the **Visual filters** section . To add a component, simply select the element in the center of the chart or stream, and when the dialog appears, select the required information from the drop-down, as shown in the following illustrations.

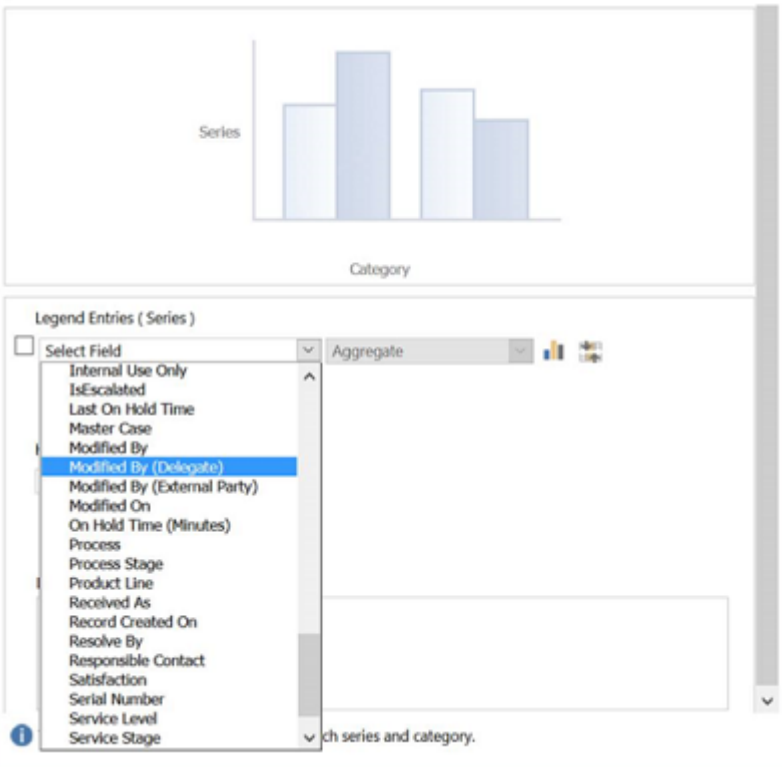
The following shows adding the **Cases By Priority** doughnut chart.



Some charts, such as bar charts or pie charts, render showing the data stored in the system. The doughnut charts and tag charts load as static images and don't show the preview of the actual data.

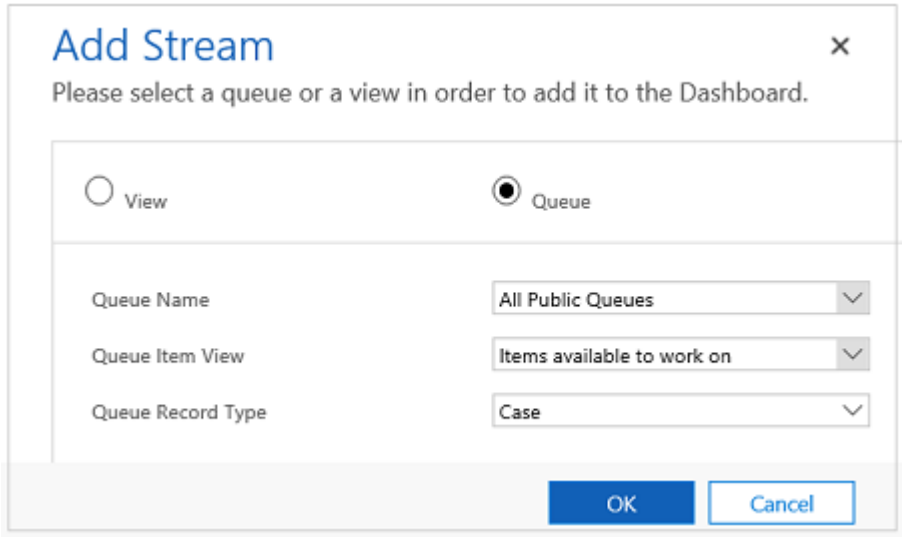
> ⓘ Note

The charts configured for the visual filters can use the fields of the **Filter** entity as well as related entities. When you use charts based on related entity fields, the customer service representatives can filter charts using these related entity fields. The fields that are based on the related entity usually have the following format in the chart configuration window: “field name (entity name)”, such as the **Modified By (Delegate)** field. To create multientity charts, you must add fields of a related entity to any of the views, and then use these fields while creating charts.



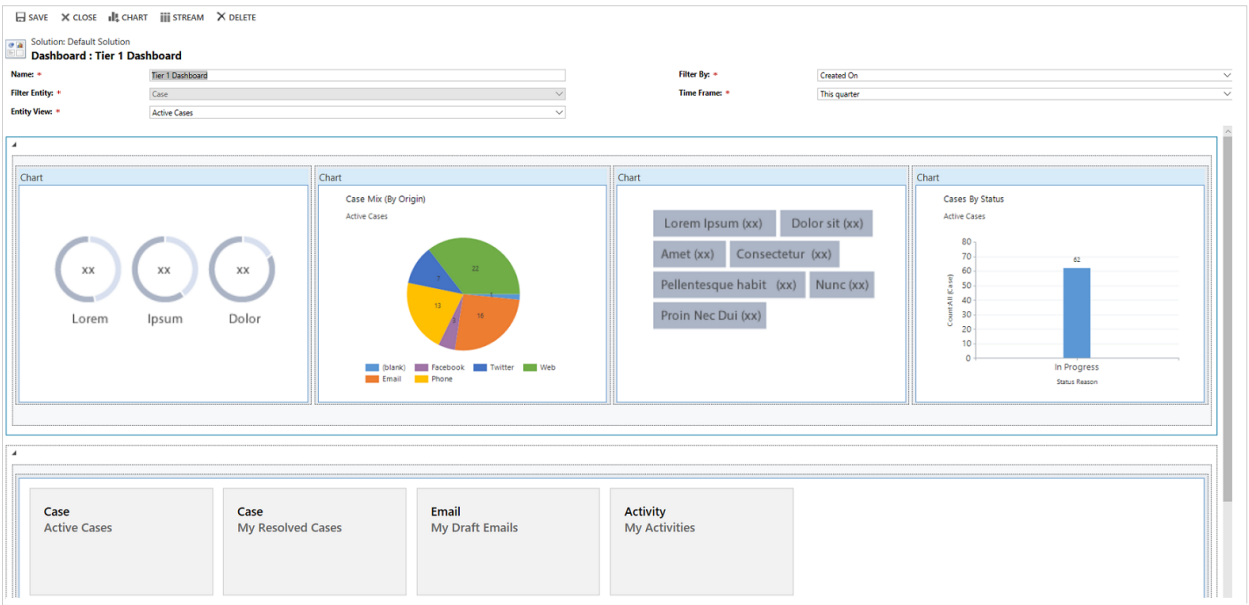
Next, configure the **Streams**. Just like with adding components in the charts, select the element inside the stream panel. When the dialog appears, select **View** or **Queue** depending on what element you want the stream to use. Enter the required information, as shown in the following illustration.

Configure the stream for the **Items available to work on** as shown here:



> **Note**
>
> The **Queue** option is available in the dialog box only for queue-enabled entities. For entity dashboards, if the entity is not queue enabled, you won't see the **Queue** option in the dialog box. You can only use the **View option** in the stream of dashboards for entities that are not queue enabled.

The following illustration is an example of a fully configured chart panel, and stream panel:



After you have completed configuring the dashboard, save it and publish the customizations for your changes to take effect.

Edit or delete individual streams of an existing dashboard

Follow the steps given below to edit individual streams of an existing dashboard:

1. Go to **Settings** > **Customizations**.
2. Select **Customize the System**.
3. Under **Components**, select **Dashboards**.

   -OR-

   If you want to edit the stream of an entity dashboard, then under **Components**, expand **Entities** and select the entity you want. Select **Dashboards** under the entity, in the navigation pane.
4. In the grid, double-click the interactive dashboard that you want to edit, to open it.
5. Select the stream that you want to edit, and then select **Edit Component**.
6. Depending on whether you want to add a view or queue to the stream, select the view or queue details for the stream, and then select **Set**.
7. Select **Save**.

   You can also delete an individual stream from a dashboard. To do this, select the stream, and then on the command bar, select **Delete**.

Configure an entity-specific dashboard

An entity-specific dashboard is a multistream dashboard. Configuring this dashboard is similar to configuring a home page multistream dashboard, but you do it in the different place in the UI and there are other minor differences.

For example, instead of selecting an entity, some fields in the entity-specific dashboard are preset to the entity for which you are creating the dashboard.

1. Go to **Settings** > **Customizations**.
2. Select **Customize the System**.
3. Under **Components**, expand **Entities** and select the entity you want. Select **Dashboards** under the entity, in the navigation pane.
4. In the grid, select **New**, and select **Interactive experience dashboard** in the drop-down list.
5. Choose the layout and select **Create**.

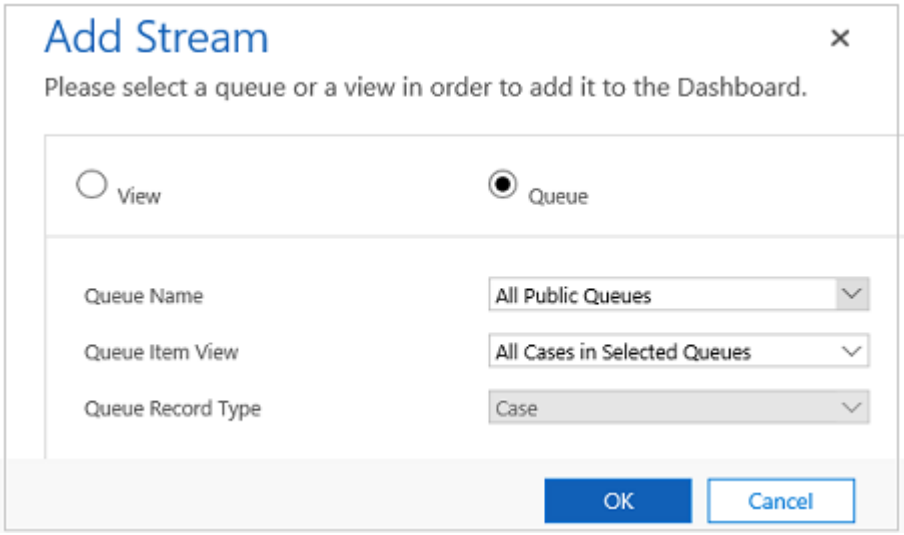
6. When the dashboard form opens, the **Filter Entity** is preset to the entity for which you are creating the dashboard. The **Entity View** drop-down list contains the available views for the entity. Select the view and fill in the rest of the required information on the page.

The rest of the setup is very similar to the home page multistream dashboard setup described in the previous section.

Configure a single-stream dashboard

Configuring a single-stream dashboard is similar to the multistream dashboard. All UI navigation steps are the same as for the multistream dashboard. You can choose a layout that includes tiles or the layout that doesn't include tiles.

If the tiles are included, they are always displayed on the dashboard. To configure a tile, you select on the icon in the center of the tile. When the **Add Tile** window opens, fill in the required data. The following illustration is an example of the tile setup.



Publish the dashboard to the app

1. In your Dynamics 365 instance, go to **Customize the System**.
2. In **Components**, select **Model-driven Apps**.
3. Double-click the app that you want to edit.
4. In the right pane of the **App Designer** window, select the dashboard to add.
5. Save and publish.

Configure dashboard colors

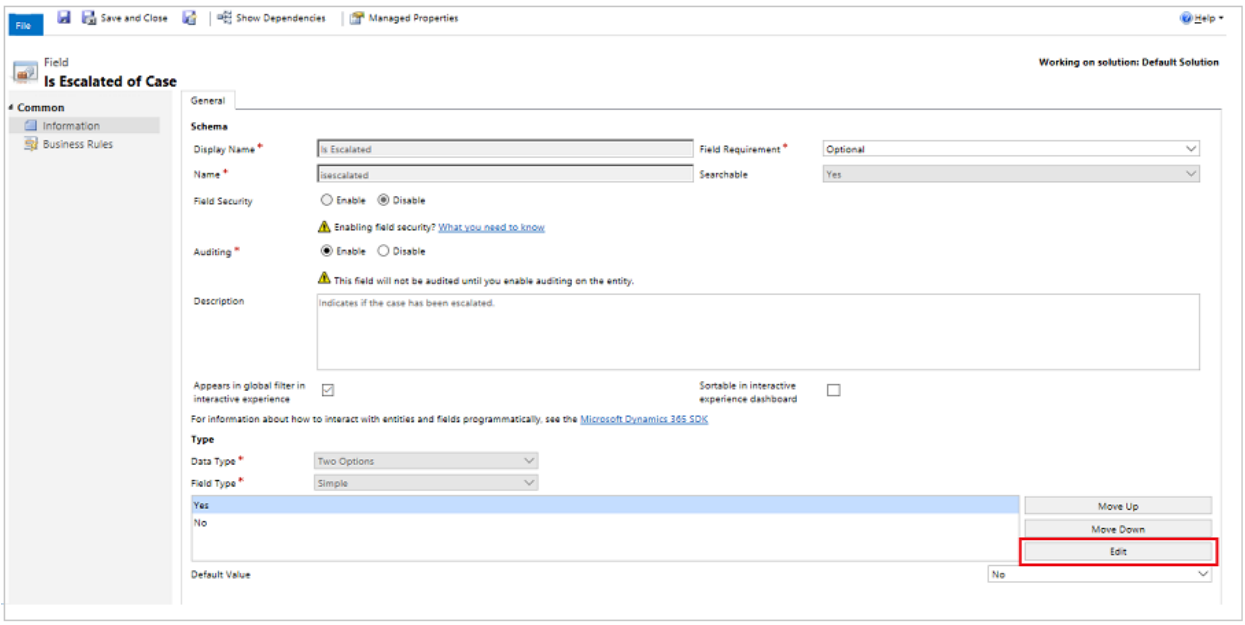
For all **Option Set** and **Two Options** type fields, such as the **Case Type**, **IsEscalated** or **Priority** of the **Case** entity, you can configure a particular color that will appear in the charts and streams for specific field values. For example, high priority cases can be shown in red, medium priority cases in blue, and low priority cases in green in the interactive charts. In the streams, there will be a thin vertical line in color next to the work item description.

> ⓘ **Note**
>
> The color coding isn't available for the tag charts and doughnut charts. These charts appear on the dashboard in white, gray, and black shades.

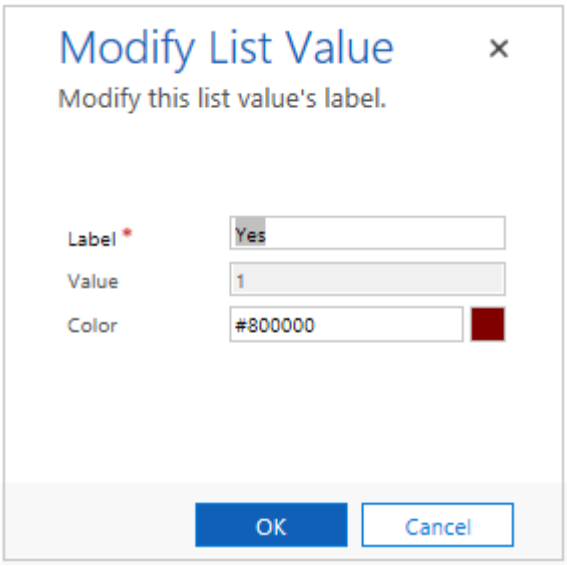
1. Go to **Settings** > **Customizations**.
2. Select **Customize the System**.
3. Under **Components**, expand **Entities**, and then expand the entity you want.
4. In the navigation pane, select **Fields**. In the grid, double-click the field that you want to configure the color for.
5. In the **General** tab, in the **Type** sub-area, select **Yes** and select **Edit**.
6. When the **Modify List Value** dialog appears, set the new value in the **Color** text box. Select **OK**.

   Select **Save and Close**.
7. Select **Publish** for your changes to take effect.

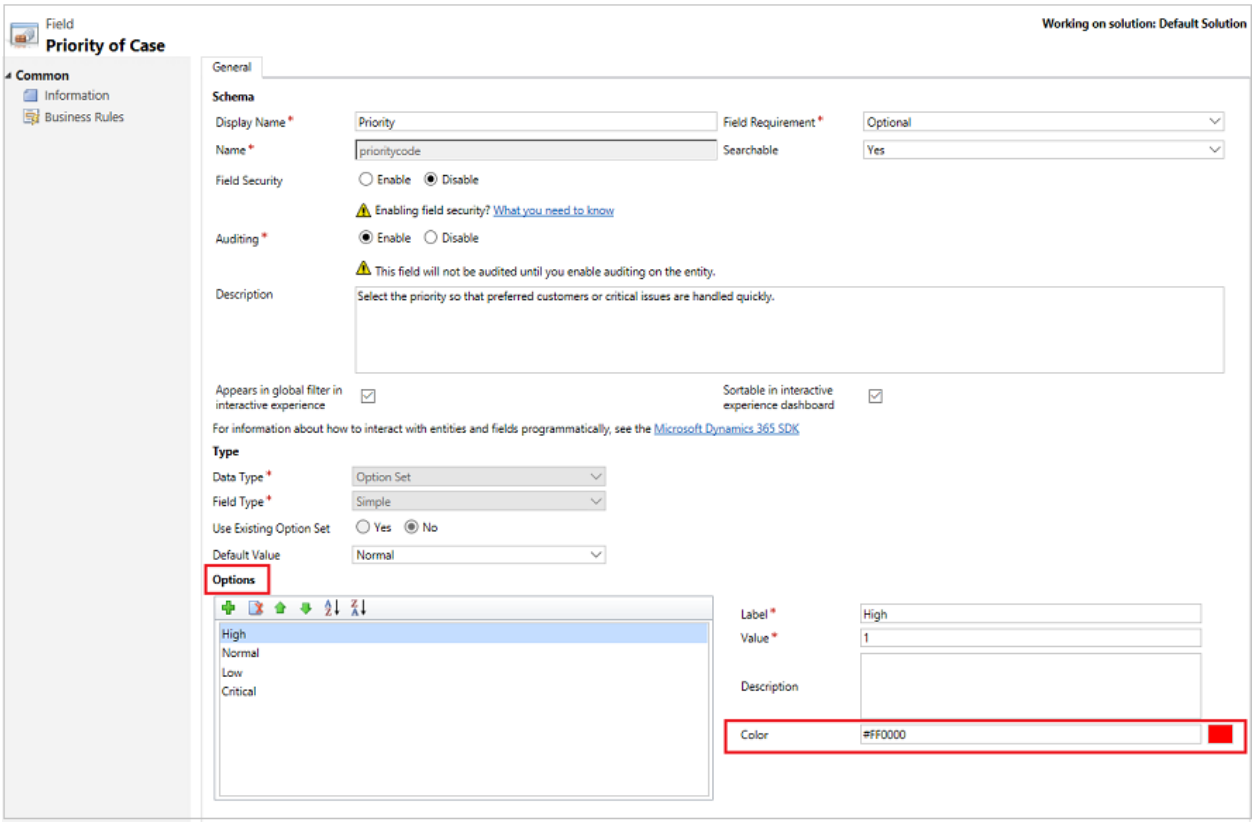
In the following example, we're changing the color for the **IsEscalated** field. Use the **Edit** button to open the **Modify List Value** dialog box:



When the **Modify List Value** dialog box opens, choose the color as shown here:



Similarly, if you go to the **Priority** field to modify the colors of the case priority options, choose the color in the **Options** sub-area of the **General** tab, as shown below:



See also

Use interactive dashboards to effectively manage service cases in the Customer Service Hub

Create and edit dashboards

Create or edit a chart

Overview of Service Scheduling

Article • 09/18/2023

Avoid disruptions in service by making sure that your resources are scheduled optimally and efficiently. Using Scheduling in Customer Service Hub, you can plan and schedule service activities for your customers by bringing together all your resources.

Understand the scheduling experience

Scheduling, which is built on top of **Universal Resource Scheduling (URS)**, provides an efficient way to schedule resources for service activity. It considers the availability of employees, facilities, and equipment to plan schedules accordingly. It also helps customer service organizations with improved service quality by preventing over-scheduling.

Scheduling scenario

The following scenario helps to understand how the scheduling capability lets you manage your service activities seamlessly:

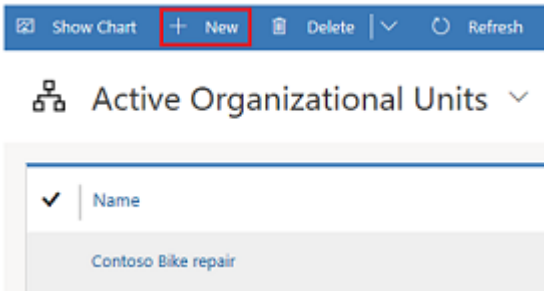
Contoso bike repair schedules repair services for their customers. To facilitate this process, Contoso needs to bring together the following information:

- Geographical locations where they need to offer their services.
- The personnel and equipment they need to perform those services.
- The types of bike repair services they offer.
- Work hours during which they perform their services.
- Capacity and expert level for all personnel.

Contoso can benefit from the scheduling feature by quickly catering to their customers with their repair services. With the various scheduling entities, they can plan service activities for their customers by considering the availability of resources, facilities, and equipment.

Let's see how Contoso accomplishes the task:

Step 1: Create organizational units
Organizational units are the locations where Contoso provides service to their customers. More information: Create and manage organizational units

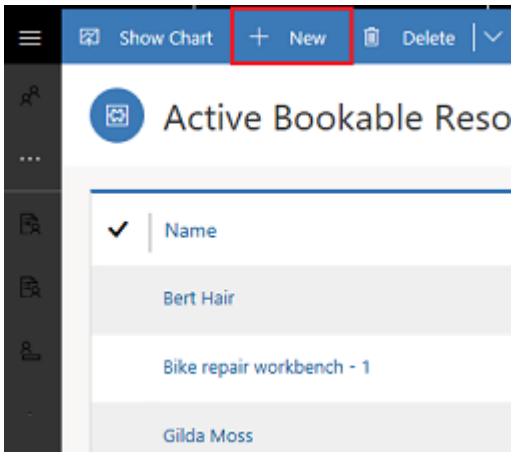


Step 2: Create resources

Contoso lists the resources required to perform the services.

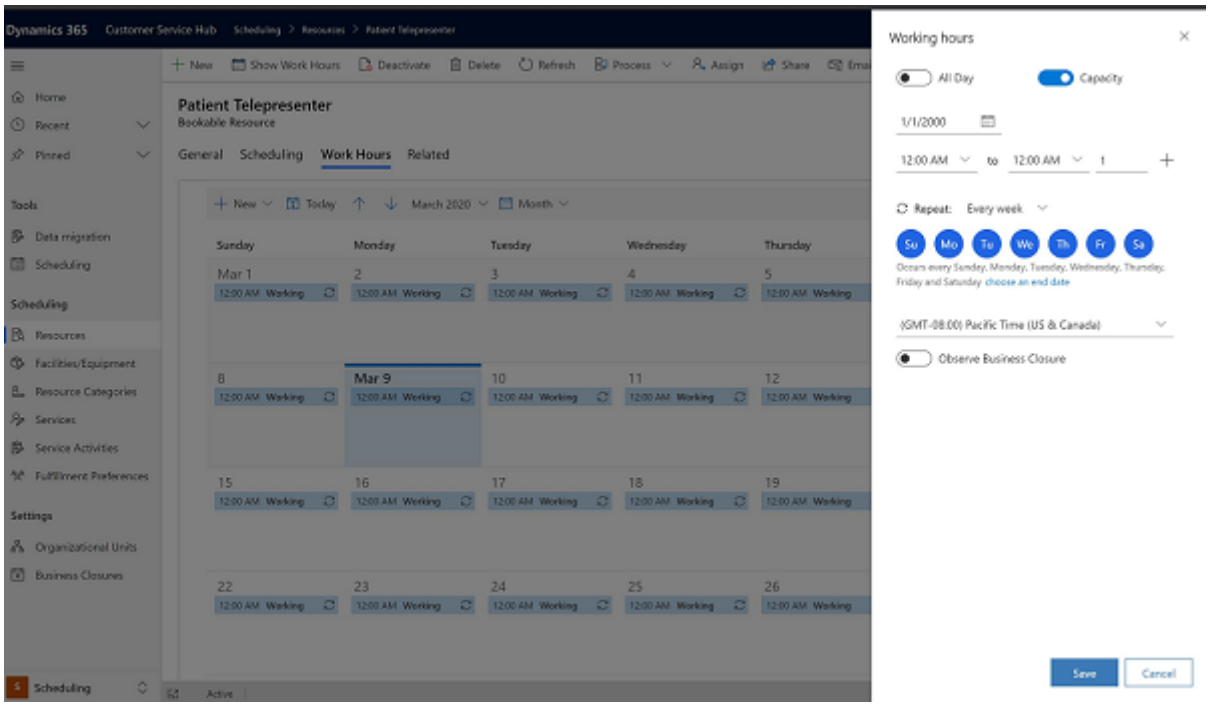
> **Note**
>
> You can create all resource types using the Resource entity.

In this example, two resources (contacts) Bert Hair and Gilda Moss are created. Similarly, two more resources (facility/equipment) are created as Bike repair workbench - 1 and Bike repair workbench - 2, which are required to perform the service. More information: Create and set up bookable resources



Step 3: Set work hours for the resource, resource group or facility/equipment

The availability of the resources is defined in the work hours section. More information: Set work hours for the resources

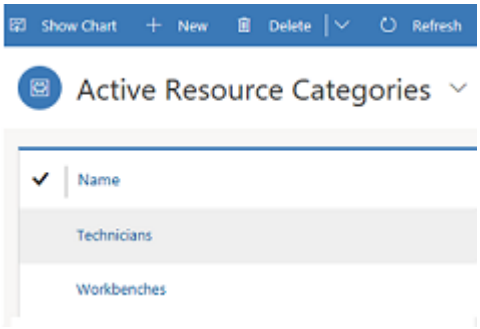


Step 4: Create resource groups

The resources are aligned in resource groups or resource categories.

In the example, Bert Hair and Gilda Moss are grouped as Technicians and Bike repair workbench - 1 and Bike repair workbench - 2 are grouped as Workbenches.

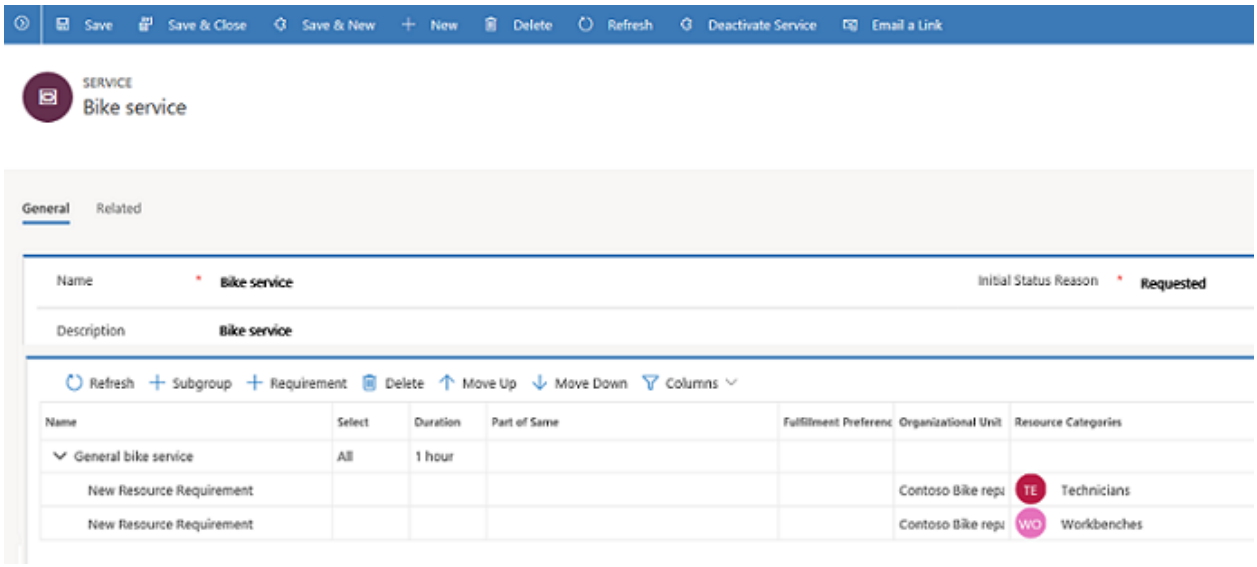
More information: Create and manage resource categories



Step 5: Create a service record

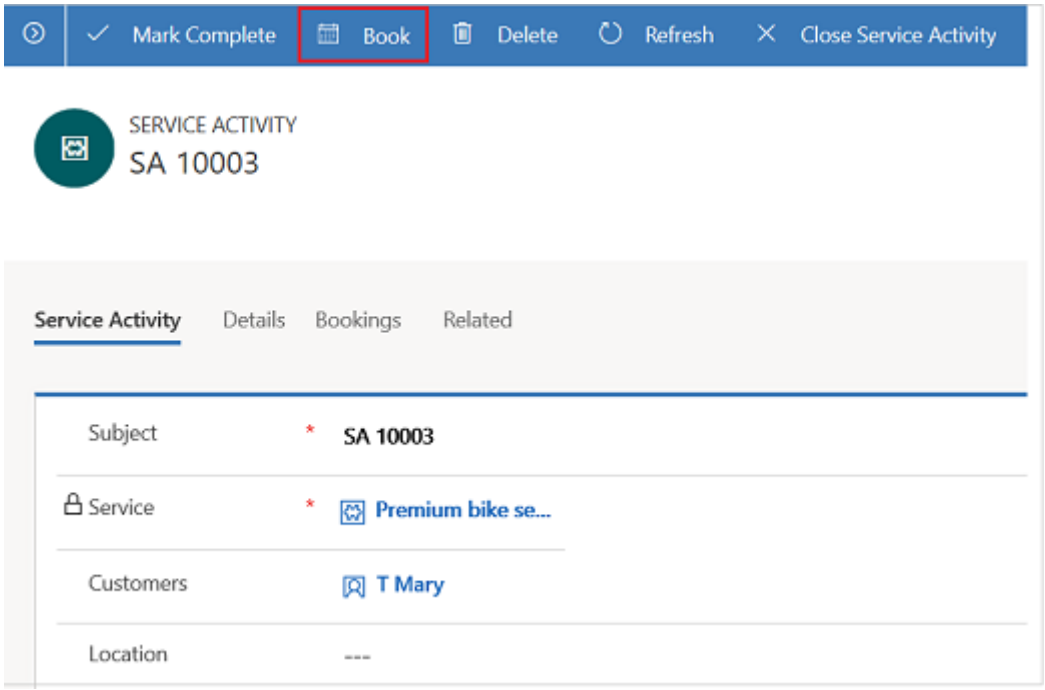
Contoso now collates all the above inputs to create a bike repair service record for the customer. They also specify the resources/resource groups they will need for the service.

More information: Create or edit a service in Service Scheduling



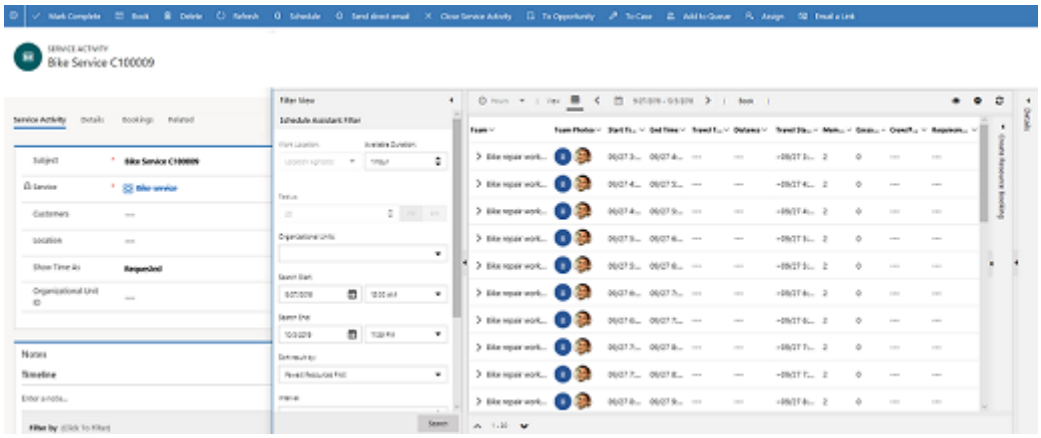
Step 6: Create a service activity

A service activity is defined to look for the next available time slot to schedule the service and align resources as per requirement. More information: Schedule a service activity



Step 7: Book the service in the schedule board

The schedule board displays all the service configurations at one place to quickly schedule a service. More information: Use the schedule board to configure service activity



Set up the Service Scheduling experience

The set up experience is different based on the following scenarios:

- For new or existing organizations, where Core Service Scheduling solutions isn't installed, install Service Scheduling from the Power Platform admin center.
- For existing organizations, where Core Service Scheduling solutions is already installed, install the available updates by checking your app status from the Power Platform admin center.

Prerequisites

- Make sure that you have the required security role or equivalent permissions. More information: Manage security roles in service scheduling
- Ensure your organization has Universal Resource Scheduling 3.2.0.405 or a later version. If your organization has a version prior to 3.2.0.405, then Universal Resource Scheduling installation fails. To check the Unified Resource Scheduling version on your instance, go to **Settings** > **Solutions**.

  More information: Schedule anything with Universal Resource Scheduling (Sales, Customer Service, Field Service, Project Service Automation).

  > ⓘ **Note**
  > - If your organization doesn't have Universal Resource Scheduling, the **Core Service Scheduling** solution installs the latest version of Universal Resource Scheduling.
  > - If Field Service or Project Service is already installed on your organization with Universal Resource Scheduling 3.2.0.405 or later version, then

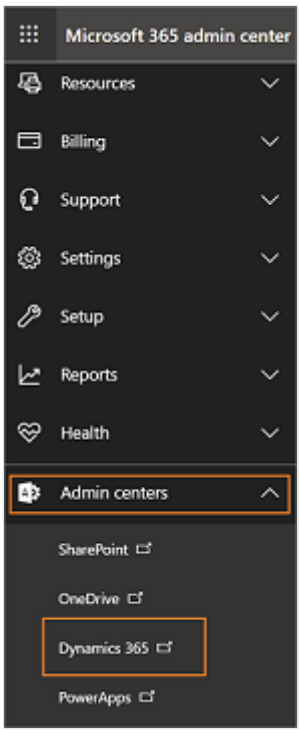
Universal Resource Scheduling will also be upgraded to the latest version. Otherwise, the installation fails.

- The latest version of Universal Resource Scheduling might not be compatible with the older versions of Field Service or Project Service.

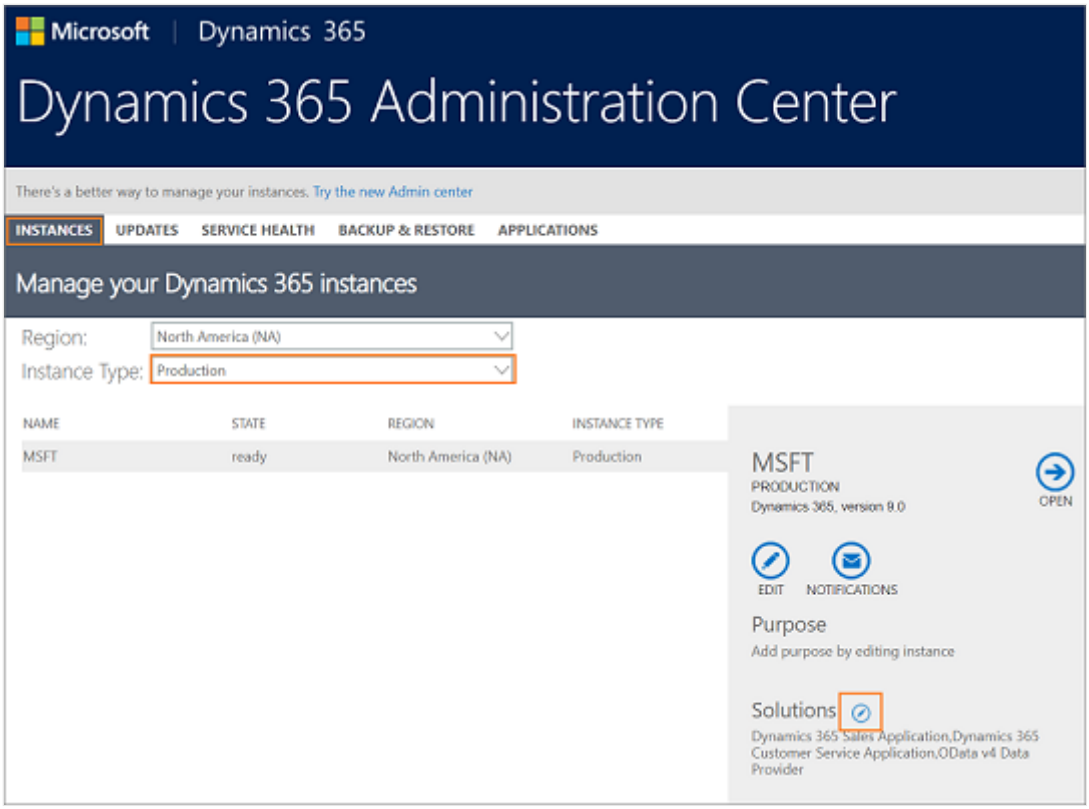
- Ensure your organization has Customer Service Hub application.

Install the Scheduling solutions

1. Go to Microsoft 365 Admin center.
2. Select **... Show all** > **Admin centers** > **Dynamics 365**. Dynamics 365 opens in a new tab.

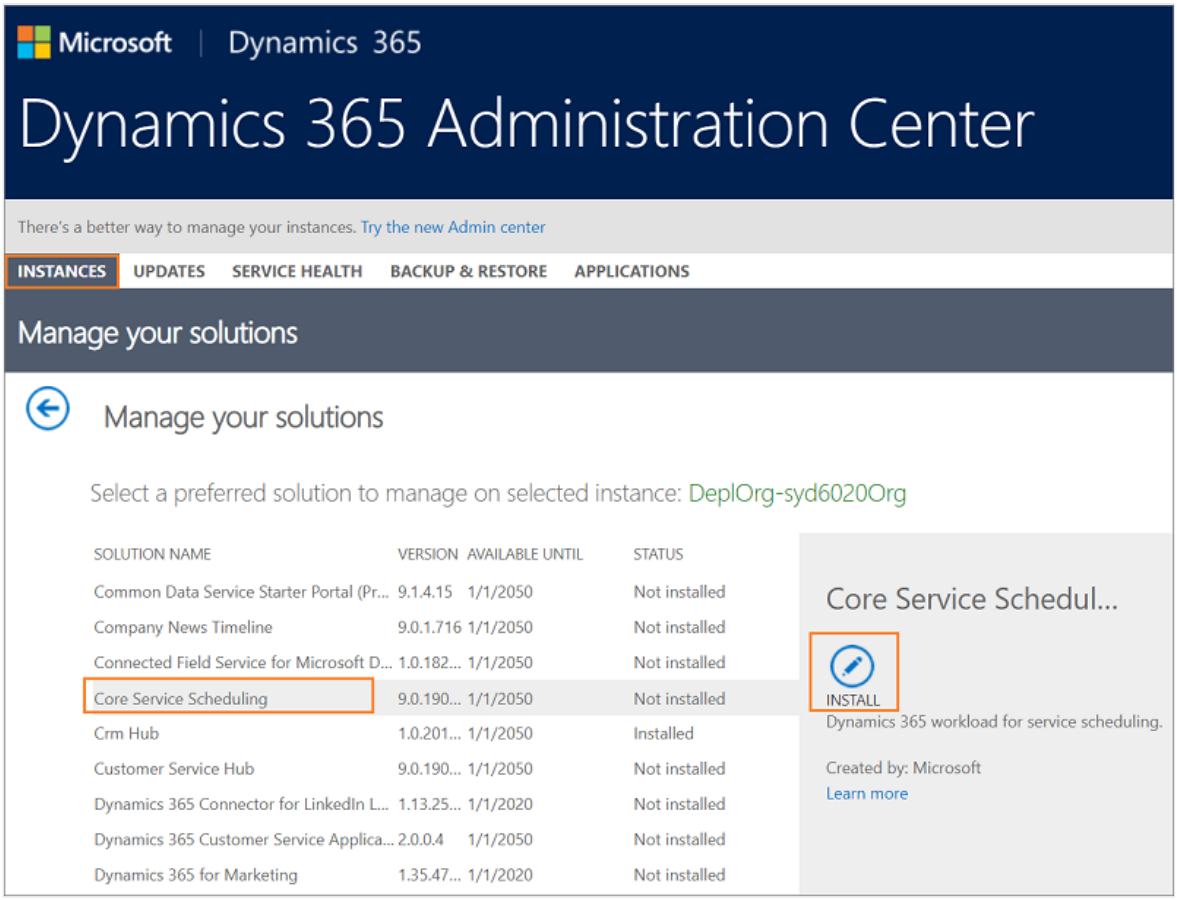


3. In the **Dynamics 365 Administration Center**, under the **Instances** tab, select an instance type from the drop-down.
4. select the edit icon next to solutions. Manage your solutions page appears.



5. In the **Manage your solutions** page, select **Core Service Scheduling**. The status column shows **Not installed**.

6. Select the install icon next on the **Core Service Scheduling** card. The **Terms of service** page appears.



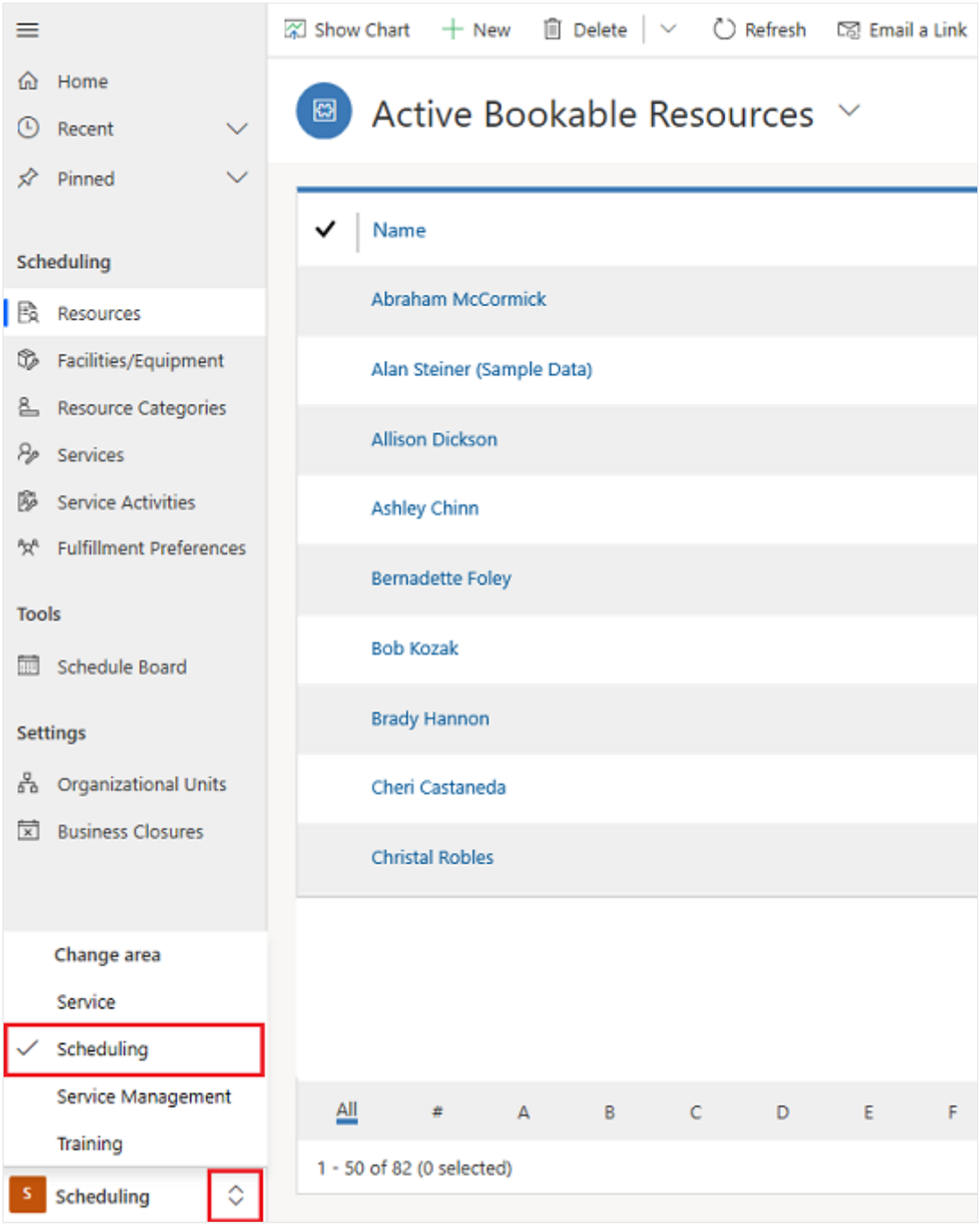
7. In the **Terms of service** page, read the terms and conditions and then select **install**. The installation may take few minutes.

After successful installation, you can access scheduling in the Customer Service Hub sitemap.

Access scheduling in the Customer Service Hub

With the latest release of Dynamics 365 Customer Service, Scheduling is powered by Universal Resource Scheduling, and is available from the Customer Service Hub sitemap.

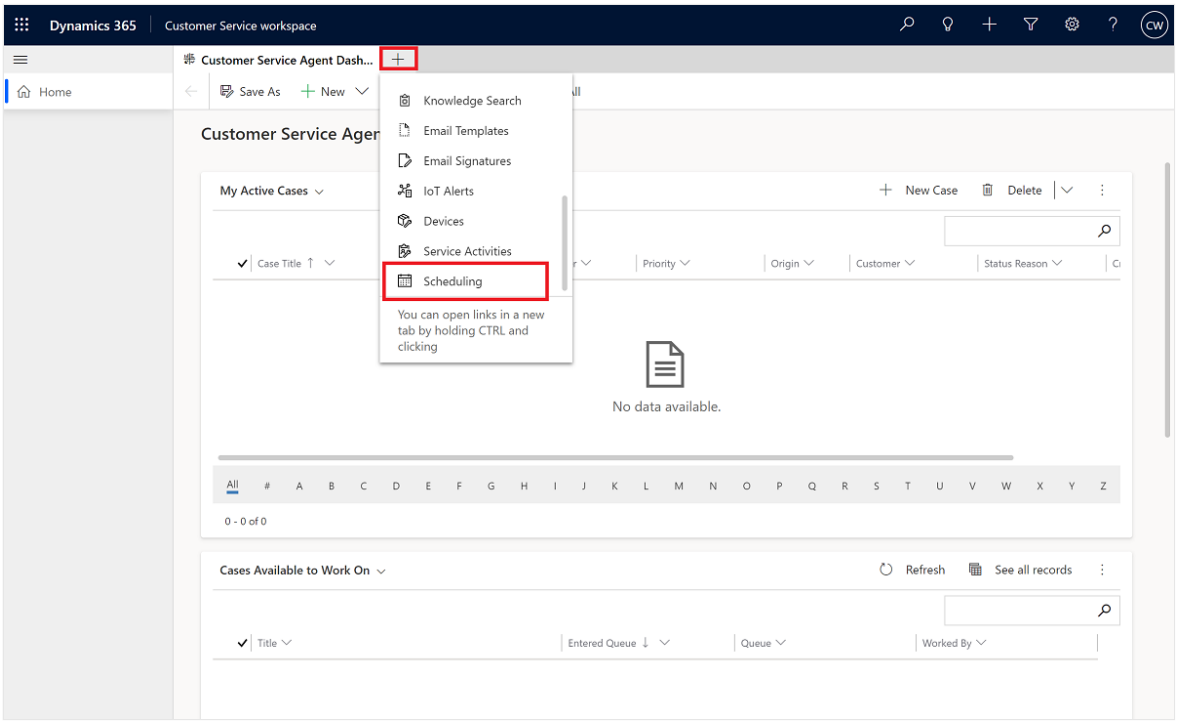
- Select ⇕ to go to **Scheduling** and access the entity record types.



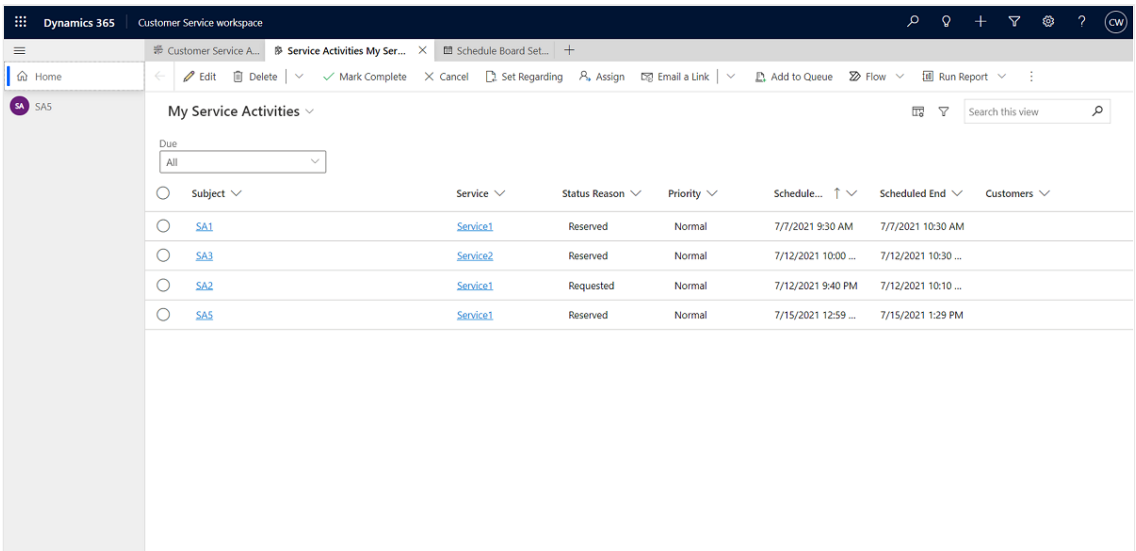
Access scheduling in Customer Service workspace

You can also access Scheduling in the Customer Service workspace app.

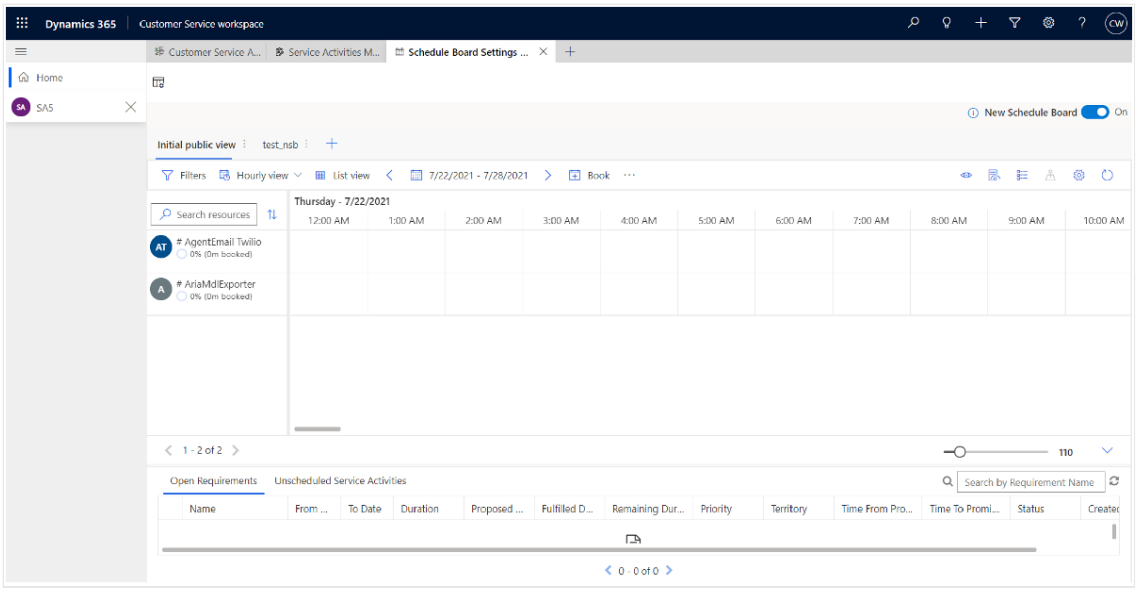
- Select the + icon to expand the menu to view a list of forms, views, and activities, and then select either **Service Activities** or **Scheduling** to open the feature in a new tab.



  - **Service Activities**



  - **Scheduling**



Configure entity records in the new scheduling experience

Configure all your entity records in the new experience manually from the user interface.

Make sure that you have the correct security role or equivalent permissions. Know more about security roles: Manage security roles in service scheduling.

> **ⓘ Important**
>
> The admin must follow the order as given in the **Scheduling scenario** while configuring entity records in the new scheduling experience.

> **ⓘ Note**
>
> All entity records can be configured from the user interface except Service Activity.

Understand scheduling entities

Scheduling entities are grouped under the following logical groups:

Scheduling

- **Resources**
  Anything that needs to be scheduled can be termed as **Resources**. This can be personnel, crews, service centers, company assets (equipment), accounts, or contacts.

More information: Create and set up bookable resources

- **Facilities/Equipment**
  Facilities and equipment are resources you'd use to perform services for your customers. Facilities can be physical spaces like service bays or conference rooms and equipment could be tools or other assets.

  More information: Add facilities and equipment to schedule service

- **Resource Categories**
  With Resource categories, you can group your bookable resources by type. For example, you can create categories like technician, supervisor, subcontractor, vehicle, or equipment.

  More information: Create and manage resource categories

- **Services**
  To make scheduling services quick and easy, it's helpful to predefine the specifics of the services you'd provide to customers.

  More information: Create or edit a service

- **Service Activities**
  Create a service activity by finding the next time resources are available for a service.

  More information: Schedule a service activity

- **Fulfillment Preferences**
  Choose and customize how to display schedule assistant results, like with neat hourly appointments or morning and afternoon time windows.

  More information: Fulfillment preferences

Tools

- **Schedule Board**
  The Dynamics 365 Customer Service schedule board provides an overview of resource availability and bookings you can make.

  More information: Use the schedule board to configure service activity

Settings

- **Organizational Units**
  Your company organizes its business by geography, function, or other areas. You

can create organizational units that reflect your business.

More information: Create and manage organizational units

- **Business Closure**
  Prevent scheduling resources on holidays and other non-working days by defining business closures.

  More information: Set when your business is closed

See also

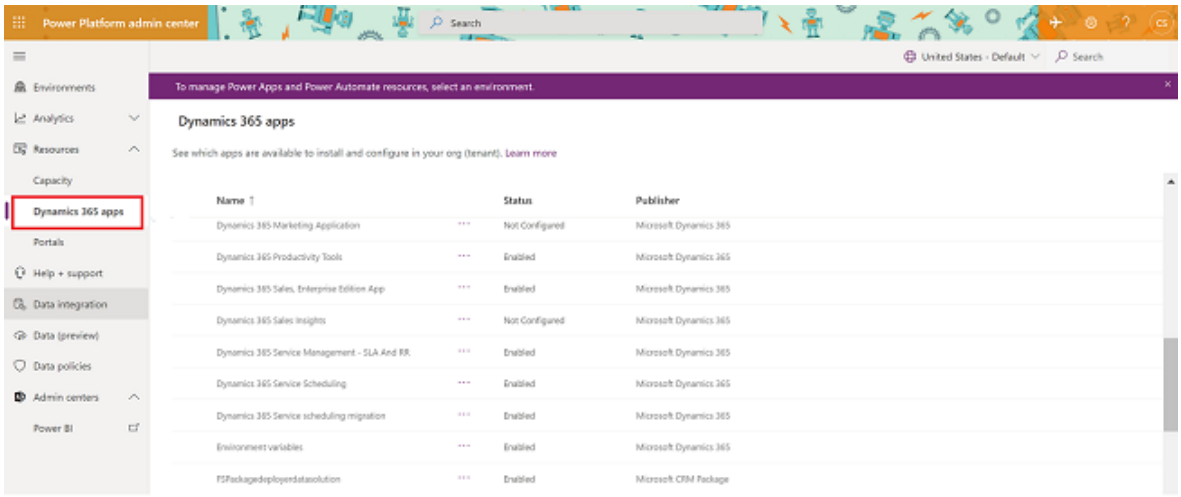
Service Scheduling FAQ

Install Service Scheduling from Power Platform

Article • 07/07/2021

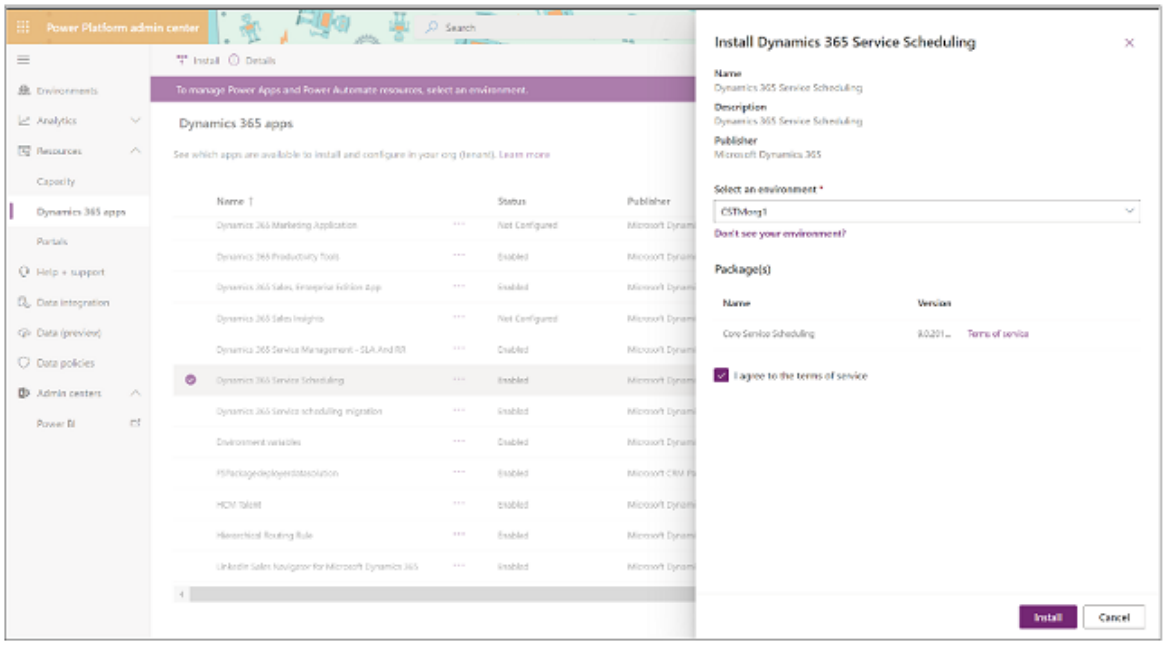
You can install Core Service Scheduling from the Power Platform admin center by using the following steps:

1. Expand **Resources**, and then select **Dynamics 365 apps**.



2. Under the list of application names, select **Dynamics 365 Service Scheduling**, and then select **Install**.

3. Select the environment where you would like to install the latest app (the installation will start with the dev environment. Once the dev instance succeeds, it will change to test and then production.



4. If you agree to the terms and conditions, select the checkbox next to **I agree to the terms of service**, and then select **Install**.

Manage security roles in service scheduling

Article • 07/14/2021

Security roles help to identify the privileges a user can exercise in the system. Security roles also define which entities a user can view or configure. For example, a user may have permission to see accounts but cannot see specific fields of an account.

The following standard security roles are leveraged in service scheduling:

- **Scheduler Manager**. This role can set up the service scheduling experience. This role can access and set up all service scheduling entities in the system:
  - Resources
  - Resource Categories
  - Facilites/Equipment
  - Services
  - Service Activities
  - Schedule Board
  - Organizational Units
  - Business Closure

  However, to ensure that all Scheduler Managers are able to set up the new scheduling experience and access the new scheduling entities, they should also be assigned the **Customer Service Schedule Administrator** and **Schedule Manager** roles.

  To learn more about how to create users and assign roles to them, see Create users and assign security roles.

- **Scheduler**. This role can create and schedule service activities.

  To ensure that all Scheduler users are able to schedule services using the new scheduling experience, they should also be assigned the **Customer Service Scheduler** and **Scheduler** roles.

More information: Security roles and privileges

Understand roles and their privileges

Each role in the scheduling experience is expected to perform a set of actions. Refer the table below to learn more about the privileges of the Schedule Manager and Scheduler

role:

Role	Privileges
Schedule Manager	Can create, access, and perform CRUD operations on Services
	Can create, access, and perform CRUD operations on Service Activities
	Can access Schedule Board
	Can create and access Facilities and Equipment
Scheduler	Can create, access, and perform CRUD operations on Service Activities
	Can access Schedule Board
	Can create and access Facilities and Equipment

See also

Create or edit a security role to manage access

Create and manage organizational units

Article • 04/04/2022

Introduction

Create organizational units to organize and maintain a company's business by geography, function, or other areas. You can create multiple organizational units in Service Scheduling to categorize your business by various areas.

Create a new organizational unit

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

You can create a new organizational unit in the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.

   b. In the **Organizational units** section, select **Manage**.

      The **Active Organizational Units** view is displayed. You can switch between various system views using the drop-down list.

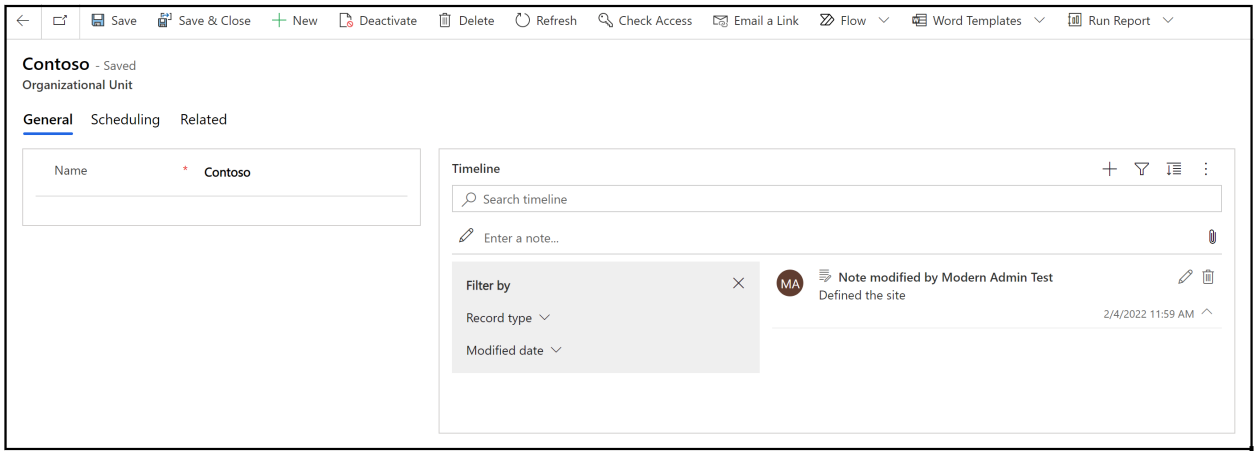
2. On the command bar, select **New** to create a new organizational unit.

3. In the **General** section, type a **Name** for the organizational unit.

4. In the **Scheduling** section, Provide **Latitude** and **Longitude** for the organizational unit.

5. Select **Save** to save the new organizational unit. The new record is saved and activated by default.

Active organizational units can be edited, assigned, shared, or viewed from the **Active Organizational Units** system view.



See also

Service Scheduling overview

Set when your business is closed

Article • 04/04/2022

Introduction

Prevent scheduling resources on holidays and other nonworking days by defining business closures in Dynamics 365 Customer Service. You can set both the days and times that your organization will be closed.

Schedule a new business closure

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

You can schedule a business closure in the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.
   b. In the **Business closure** section, select **Manage**.

   The **Business Closures** view is displayed. You can switch between various system views using the drop-down list.

2. On the command bar, select **New** to schedule a new business closure.

   You can also select **New** from the business closure grid to create a new business closure record.

   A quick create dialog box is displayed.

3. In the **Schedule a Business Closure** dialog box, type or modify information in the text boxes:

   - In the **Name** box, type a name that describes the purpose of the closure.

The first 12 characters of the name appear on each day of the closure on the calendar view of the affected resource's **Work Hours**.

- If the closure is an all-day event, select the **All Day Event** check box. The application automatically enters the duration of *one day*.
- In the **Start Time** and **End Time** boxes, enter the start and end date and time for the closure.
- If you want to enter duration instead of an end time, select the length of the closure in the **Duration** box. The application automatically calculates the end time for you.

  If you want to enter a specific time period, clear the **All Day Event** check box. You can then specify the hours during which your organization will be closed.

4. To save this business closure, select **OK**.

See also

Set work hours for the resources
Set up a holiday schedule
Create a customer service schedule and define the work hours

Enable an entity for resource scheduling

Article • 06/22/2023

Enabling an entity for scheduling allows agents to schedule the requirements related to that entity to the matching resources.

Prerequisites

You must have the System Administrator role to enable an entity for scheduling.

Enable an entity for resource scheduling

1. In **Resource Scheduling**, change to the **Settings** area, and then under **Scheduling**, select **Administration** > **Enable Resource Scheduling for Entities**.
2. In the **Enable New Entity** section, under **Add Entity**, select an entity from the list.

   > **Tip**
   >
   > If the entity you want to enable doesn't show in the list, update the **Can be customized setting** to **True** for the managed property.

3. For **Booking Relationship** and **Requirement Relationship**, select **Create New Relationship**. Select an existing relationship if you've previously created relationships to the bookable resource booking or resource requirement entities.
4. Select **Publish Customization**.

Disable resource scheduling for an enabled entity

To turn off scheduling for a previously enabled entity, select **Deactivate** in the ribbon on the **Booking Setup Metadata** record of the enabled entity.

Edit settings for enabled entities

If you want to change the booking settings for entities you enabled for scheduling, complete the following steps.

1. In **Resource Scheduling**, change to the **Settings** area, and then in **Scheduling**, select **Administration** > **Enable Resource Scheduling for Entities**.

2. In the **Enabled Entities** section, double-click the entity you want to edit. A new tab with the booking setup metadata for the selected entity is opened.

Setting	Effect	Value
Default booking duration	Defines the default duration of a new booking.	Predefined set of duration options.
Default booking committed status	Sets the default value to use when a booking moves into Committed state.	Available booking statuses.
Default requirement active status	Sets the default value to use when a requirement moves into Active state.	Available requirement statuses.
Default requirement canceled status	Sets the default value to use when a requirement moves in Canceled state.	Available requirement statuses.
Resource availability retrieval limit	Defines the maximum number of resources returned as a result of the scheduling assistant.	Number.
Enable quick book	Use the quick book experience on an entity record.	Yes: Use quick book experience. No: Use schedule assistant experience.
Cancel bookings when moving	Cancel bookings moving the booking to a different time slot.	Yes: Cancel booking and create a new one in the updated time slot. No: Keep booking and update start/end time.

Setting	Effect	Value
Default booking canceled status	Sets the default value to use when booking moves into Canceled state.	Available booking statuses.
Disable requirement auto creation for bookings	Defines if the system creates a requirement for a booking	Yes: Disable automated requirement creation. No: Enable automated booking creation.
Default requirement completed status	Sets the default value to use when a requirement moves into Completed status.	Available requirement statuses.
Available duration minimum (%)	Defines the availability of a resource in relation to the booking duration. For example, if the value is 50 and the booking takes four hours. The system only considers resources for the job that have at least two hours available.	0 to 100.

3. In the **Attribute Mapping** section, choose values on the target entity that match with the requirement fields.

4. Save your changes. You've successfully enabled an entity for scheduling when:

    - **Resource Requirements** shows as a related entity. Create them manually or with a custom workflow.
    - The **Book** option appears on the entity record.

Add a requirement view to the schedule board

After you create a requirement for the lead, it will appear in the **Open Requirements** view in the lower pane of the schedule board that shows all open requirements related to any schedulable entity. This is a default view for resource scheduling. However, the views in the lower pane of the schedule board are system views that can be edited and added to. It's common to add custom resource requirement views for schedulable entities.

1. Go to **Advanced Settings** > **Customizations** > **Entities** > **Resource Requirement** > **Views**.
2. Create a new view and add fields to the view that provide details for what you are scheduling.
3. Name the view and edit the filter criteria to show the records you want to see in the view.
4. Select **Save** > **Close & Publish**.

Now that the view is created, edit the schedule board that uses the new view by completing the following steps.

1. Open the board settings, and then in the **Requirement panels** section, add a new panel.
2. Type a **Title**, and then select the view to use.
3. Save your changes.

See also

Create bookable resources
Overview of service scheduling

Create and set up bookable resources

Article • 04/04/2022

A resource in Service Scheduling is anything that needs to be scheduled. You can set up Generic, Contact, User, Equipment, Account, Crew, Facility, or Pool as bookable resource.

Create a new bookable resource

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

You can create a new bookable resource in the Customer Service admin center app or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.
   b. In the **Resources** section, select **Manage**.

   The **Active Bookable Resources** view is displayed. You can switch between various system views using the drop-down list.

2. On the command bar, select **New** to create a new bookable resource.

3. In the **General** section:

   - Select a **Resource Type**. You can choose from the following options:
     - Generic
     - Contact
     - User
     - Equipment
     - Account
     - Crew
     - Facility
     - Pool

   - The field name is automatically populated. Look up for the record. You can also create a new record using the **Quick Create** dialog box.

- Select a **Time Zone**.

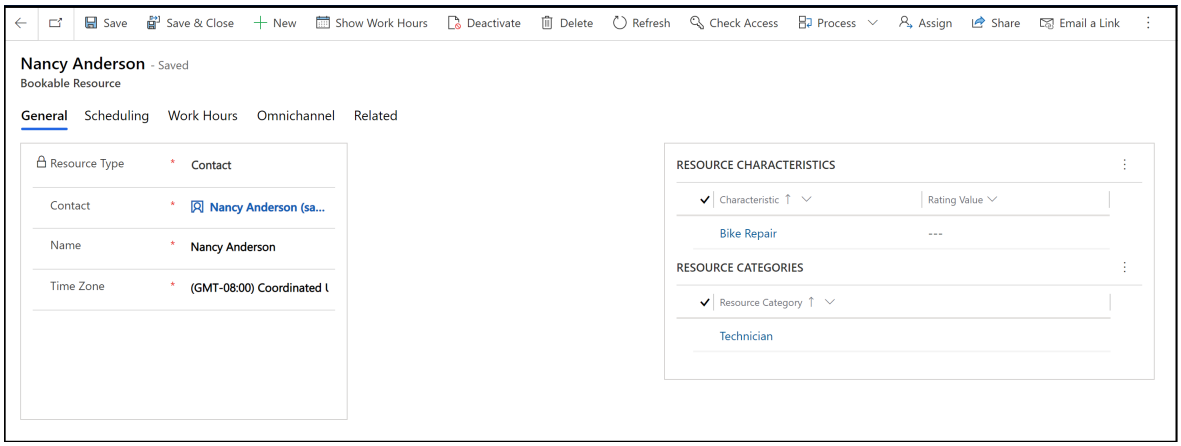
> **Note**
>
> If the Resource Type is Facility or Equipment, the time zone is automatically populated as per the facility's or equipment's time zone and it is not editable.

- Select **Save**. A new resource is created and activated by default.

  Resource Characteristics and **Resource Categories** sections are displayed.

- In the **Resource Characteristics** section, select the ellipses (...) and then select **Add New Bookable Resource Characteristics** to add characteristics.
  - Use the tooltips to help fill in your information and then select **Save**
  - Look up and assign **Rating Value**. You can also create a new rating value.
  - Assign the characteristic to a **Resource**

- In the **Resource Categories** section, select the ellipses (...) and then select **Add New Bookable Resource Category** to add a category.



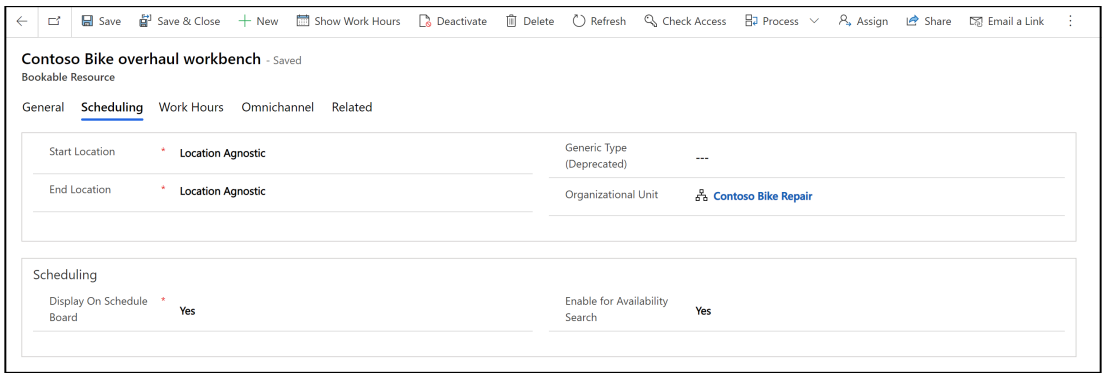
4. In the **Scheduling** section:

- Select the **Start Location** and the **End Location** to specify which location the resource will be at, when starting and ending work.

- Select an **Organizational Unit** for the resource.

> **Note**
>
> If the Resource Type is Facility or Equipment, the organizational unit is automatically populated as per the facility's or equipment's organizational unit and it is not editable.

- Select whether the resource should be displayed on the schedule board in the **Display On Schedule Board** box.
- Select whether you want to enable the resource for availability search in the **Enable for Availability Search** box.



5. Once you're ready, select **Save**.

Set work hours for the resources

You can set work hours for the bookable resources where you can define when the resources will be available to be booked for services in the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service scheduling** in **Operations**.
   b. In the **Resources** section, select **Manage**.

   The **Active Bookable Resources** view is displayed.

2. Open the resource record you want to set work hours for.
3. Select **Show Work Hours**.
4. From the **Set up** drop-down list, choose the schedule display as required.

   > **Note**
   >
   > Monthly schedules are the default display; you can choose weekly and daily schedules.

5. Double-click a date on the calendar that is the first day for which you want to set work hours.

6. In the **Edit Schedule** dialog box, select one of the following and then select **OK**.

    - **This date only**

      This option changes only the selected day.

      Skip to step 12.

    - **From <this date> onward**

      This option changes only the schedule going forward.

    - **Entire recurring weekly schedule from start to end**

      This option changes this entire schedule from the start to end date.

      Selecting this option might change past days, which could affect reports regarding hours worked in the past.

7. In the **Weekly Schedule** dialog box, in the **Set the recurring weekly schedule** section, select one of the following:

    - **Are the same each day**

      The new schedule is the same for every day of the week. After you select this option, select the days of the week that the resource is available.

    - **Vary by day**

      The new schedule is different for one or more days of the week. After you select this option, select the days of the week that the resource is available.

    - **None. User is not working**

      The new schedule includes time that the resource isn't working.

    In the **Weekly Schedule** dialog box, you can also do any of the following:

    - If the schedule is for more than one day, select the days of the week this schedule is effective.

    - If the resource doesn't work during business closures, select the **Observe** option.

- Under **Date Range**, in the **Starting on** box, you can change the date the schedule starts.

  You can't change the date the schedule ends. To end a schedule, you must define a new schedule on that date.

8. Choose the work hours link for the schedule you want to modify.

   If work hours haven't been set previously, the link is displayed as "Set Work Hours."

9. In the **Set Work Hours and Service Restrictions** dialog box, complete the following fields, and then select **OK**:

   - **Date**

     Select a date from which the work hours for services are to be considered.

   - **Start**

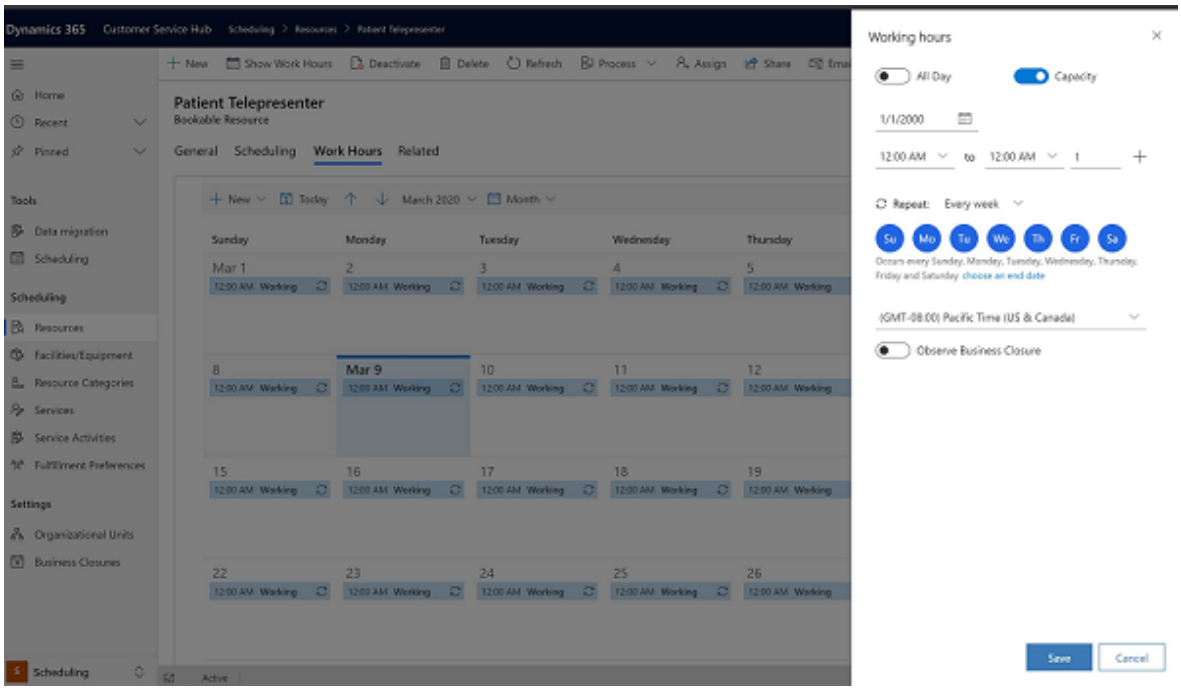
     Select the time the work day starts.

   - **End**

     Select the time the work day ends.

     To add a break in the work hours, such as a lunch break, select **Add Break**, and then select the start and end time of the break.

10. To close the **Weekly Schedule** dialog box, select **Save and Close**.



> ⓘ **Note**

To define a time when a service won't be available, on the **Service Restrictions** tab, select **New**. In the **Edit a Service Restriction** dialog box, select the service, and select the start and end time between which the service will be unavailable, and then select **OK**.

See also

Service Scheduling overview

Add facilities and equipment to schedule service

Article • 04/04/2022

Introduction

Facilities and equipment are resources you use to perform services for your customers. Facilities could be physical spaces like service bays or conference rooms and equipment could be tools or other assets. Add these resources to Dynamics 365 Customer Service to ensure optimal services for your customers.

Create a new facility or equipment record

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

You can create a new facility or equipment record in the Customer Service admin center or Omnichannel admin center app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.

   b. In the **Facilities & equipment** section, select **Manage**.

      The **Local Facilities/Equipment** view is displayed. You can switch between various system views using the dropdown list.

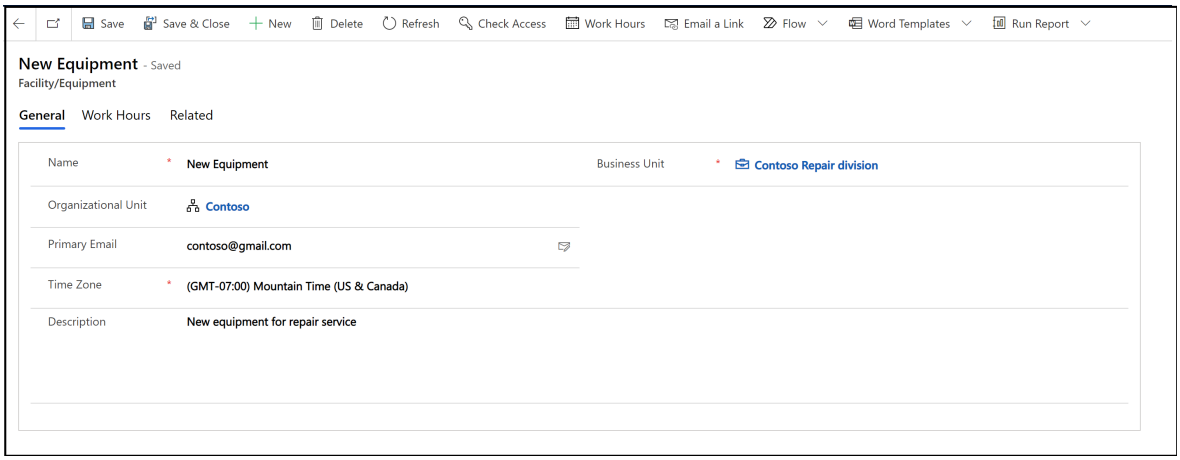
2. On the command bar, select **New** to create a new record.

3. In the **General** section, fill in the information as required:

   - **Name**. Enter the name of the facility or equipment you want to add for scheduling.

- **Business Unit ID**. Enter a business unit ID. To choose an ID, select the **Lookup** button and then select from the list. You can also create a new business unit ID.
- **Organizational Unit**. Select the location where the facility or equipment is located.
- **Primary Email**. Enter the email address of the site manager or equipment manager. If there are any updates or cancellations related to the schedule, facilities, or equipment, notifications are sent to this email address.
- **Time Zone**. Select the appropriate time zone to determine availability for the facility or equipment. By default, this is set to the time zone you've selected in the **General** tab of the **Set Personal Options** dialog box. More information: Set personal options
- **Description**. Add details about the facility or equipment, such as the numbers, size, make, or model.

4. When you're done, select **Save** or **Save and Close**.



See also

Service Scheduling overview

Create and manage resource categories

Article • 04/04/2022

With bookable resource categories, you can group your bookable resources by type. For example, you can create categories like technician, supervisor, subcontractor, vehicle, or equipment.

More information:: Multi-resource scheduling with requirement groups

Create a new resource category

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

You can create a new resource category in the Customer Service admin center or Customer Service Hub app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.

   b. In the **Resource categories** section, select **Manage**.

      The **Active Resource Categories** view is displayed. You can switch between various system views using the drop-down list.

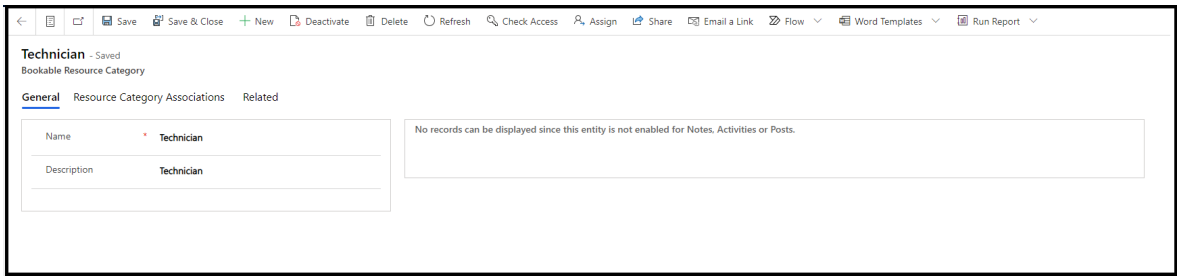
2. On the command bar, select **New** to create a new bookable resource category.

3. In the **General** section:

   - Enter a **Name** and a **Description** for the resource category

4. Select **Save**. A new resource category is created and is activated by default.

5. In the **Related** section, you can view and manage various resource category associations.



Similarly, you can create a new requirement resource category for requirements.

Add resources to a resource category

To assign resources to a resource category:

1. In the **Related** section, go to **Resource Category Associations**.
2. Select **Add New Bookable Resource Category Association**. A resource category is populated.
3. Add a resource to this resource category by selecting a resource in the **Resource** box. You can either lookup for an existing resource or create a new one.

See also

Service Scheduling overview

Create or edit a service in Service Scheduling

Article • 04/04/2022

To make scheduling services quick and easy, it's helpful to predefine the specifics of the services you provide to customers. By using the service records in Dynamics 365 Customer Service, you can define:

- How long a service activity would last.
- What resources are needed for the service activity, like resources, facilities, or equipment.

> **Note**
>
> A service requires at least one selection criteria and one or more resources or resource groups before the service can be scheduled with a service activity.

Create a service

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

You can create a service in Customer Service admin center or Customer Service Hub app

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.

   b. In the **Service** section, select **Manage**.

      The **Active Services** view is displayed. You can switch between various system views using the drop-down list.

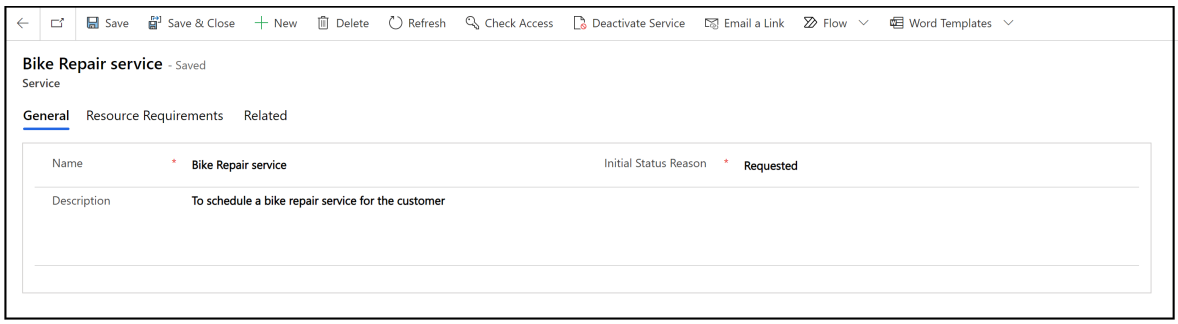
2. On the command bar, select **New** to create a new service. To edit a service, open a service from the list.

3. In the **General** section, enter a **Name** and **Description** to reflect the specifics of the service and describe what the service is.

   Also, specify the initial status of the service activity when it is created. If your organization prefers to approve all service activities before committing them to the schedule, you can select **Requested** or **Tentative**.

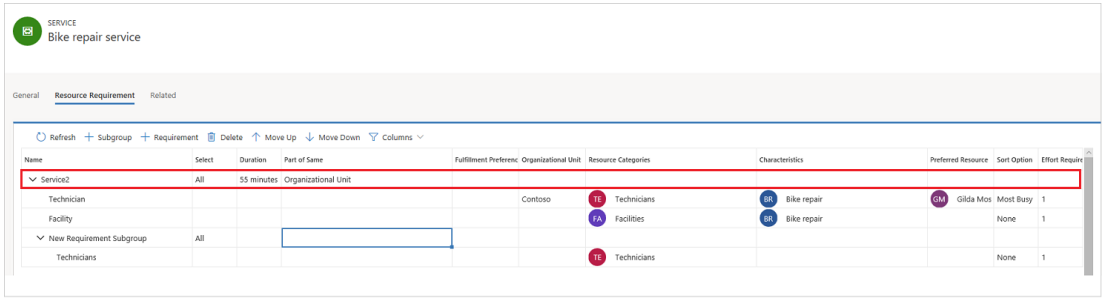
   > **Note**
   >
   > The status reason also reflects in the schedule board when you create a booking for the service.

4. Select **Save** to save the service.



5. In the **Resource Requirements** section, define the selection criteria.

   - Here, the new service record forms the root node. In the root node, you can:



   - Select **All** or **Any**. All selects resources for all the underlying requirements and Any selects resources for any one of underlying requirement.

   - Select **Duration**, and enter the duration in minutes to define the duration for which resources are allocated for the service.

     > **Note**
     >
     > The maximum duration of a service activity is 10 days.

- Lookup or quick create a **Fulfillment Preference** to define the start time and end time of the service availability in a day and intervals in which it's provided. You can also choose from a list of fulfillment preferences displayed.

  > ⓘ **Note**
  >
  > When you select create, a **Quick Create** form is displayed where you can quickly create a new fulfillment preference.

After configuring details in the root node:

- Add a new requirement subgroup by selecting **Subgroup**. You can add subgroups inside a subgroup.
- Add a new resource requirement by selecting **Requirement**.
- Choose whether the service is **Part of Same** organizational unit, resource tree or location.
- Choose the **Organizational Unit** to define the unit to which the selected resource should belong to.
- Select **Resource Categories** and choose **Resource Characteristics** to define the categories for the resource.
- Choose **Preferred Resource** to display resource options. When only preferred resources are selected on a requirement, any one of the available resources from the list of preferred resources will be selected as per the time slot. When preferred resources are selected along with the resource category on a requirement, any one of the available resources from the list of preferred resource and which belongs to the resource category will be selected as per the time slot.
- Choose **Sort Option** to sort according to most and least business impact.
- Provide **Effort Required**. While booking, this option helps you view all the resources who satify the minimum effort requirement. For example, if the effort required is defined as 100, only the resources with the capacity value of 100 and more will be displayed in the list while booking the service in the schedule board.

You can add complexity to a rule by adding a subrule to it.

> **Note**
>
> You can save a service without defining a selection criteria, but you won't be able to schedule that service.

6. When you're ready to save your data, select **Save**.

Activate or deactivate a service

You can make a service available or unavailable for scheduling by activating or deactivating it. To do this, in the list of service records, select a service, and then select **Activate** or **Deactivate** in the command bar.

> **Note**
>
> If there are open or scheduled service activities associated with a service, then the service cannot be deactivated.

See also

Create and manage resource categories

Set work hours for the resources

Schedule a service activity

Article • 09/13/2022

Use service activity to schedule service appointments by finding the next time resources are available for a service. With the help of service activity, you can coordinate and schedule resources for a service required by your customers.

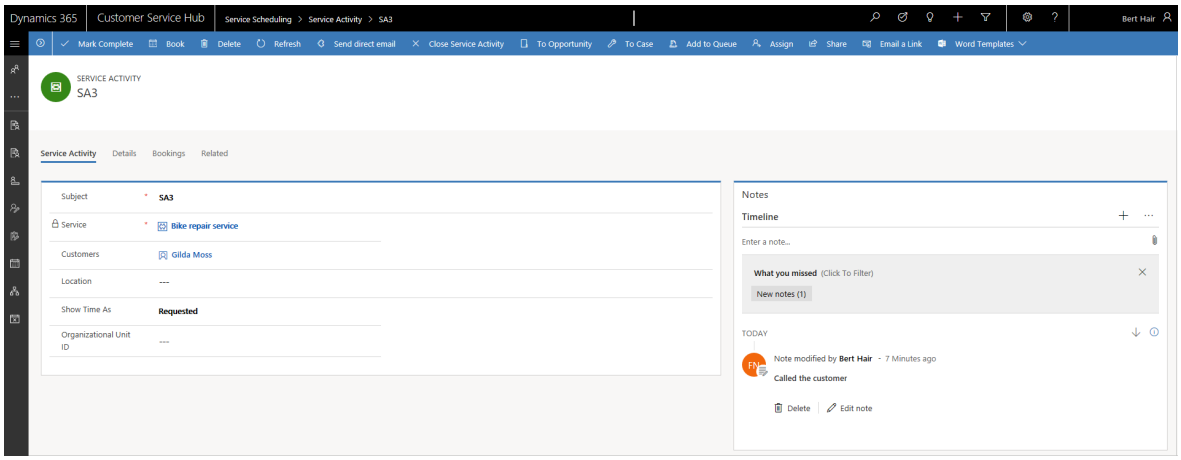
> **Note**
>
> You can't create a recurring service activity. Create individual service activities as needed.

Create a service activity

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

1. In the Customer Service Hub sitemap, go to **Scheduling**.
2. From the list of entity records, select **Scheduling** > **Service Activity**.
    - The **My Service Activities** view is displayed. You can switch between various system views using the drop-down menu.
    - Select any existing service activity to see additional options in the command bar.
3. On the command bar, select **Service Activity** to create a new service activity.
4. In the **Service Activity** section:
    - Enter the **Subject** of the service activity.
    - Select the type of service from the **Service** drop-down menu.
    - Select **Customers** to specify the customer who requested the activity.
    - Specify **Location** of the activity.
    - Select **Show Time As** either Requested or Tentative.
    - Provide the **Organizational Business Unit**.



5. Select **Save**.

6. In the **Details** section:

    - Provide the **Owner** and **Priority**.
    - Provide **Category** and **Sub-category** for the activity.

7. In the **Bookings** section:

    - View the bookings that you have scheduled in this section.

8. Select **Book** to schedule a service activity in the calendar.

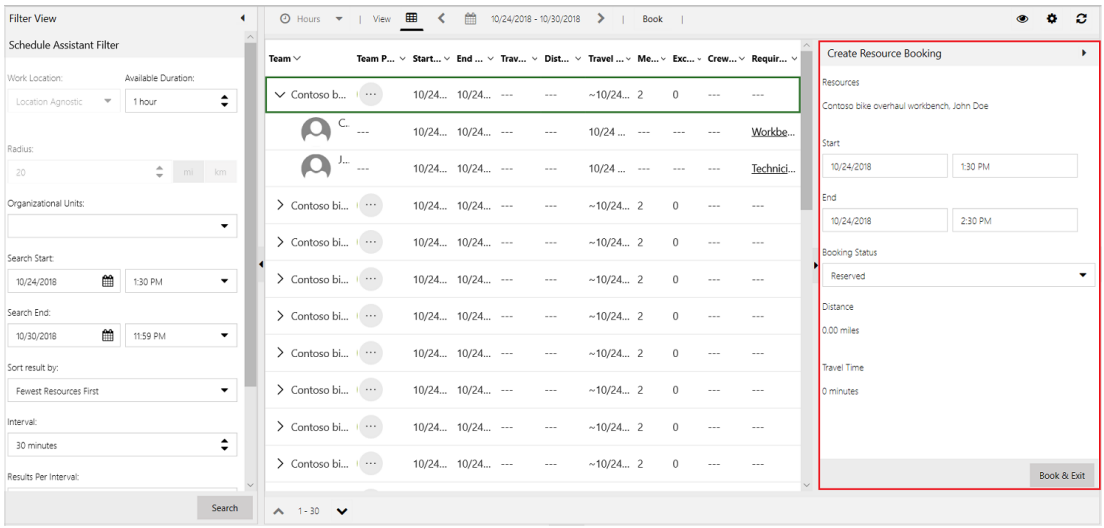
    - The **Schedule Board** is displayed. You can view the list of services and the associated resources.

    - In the **Create Resource Booking** panel, select the service start date and time and end date and time.

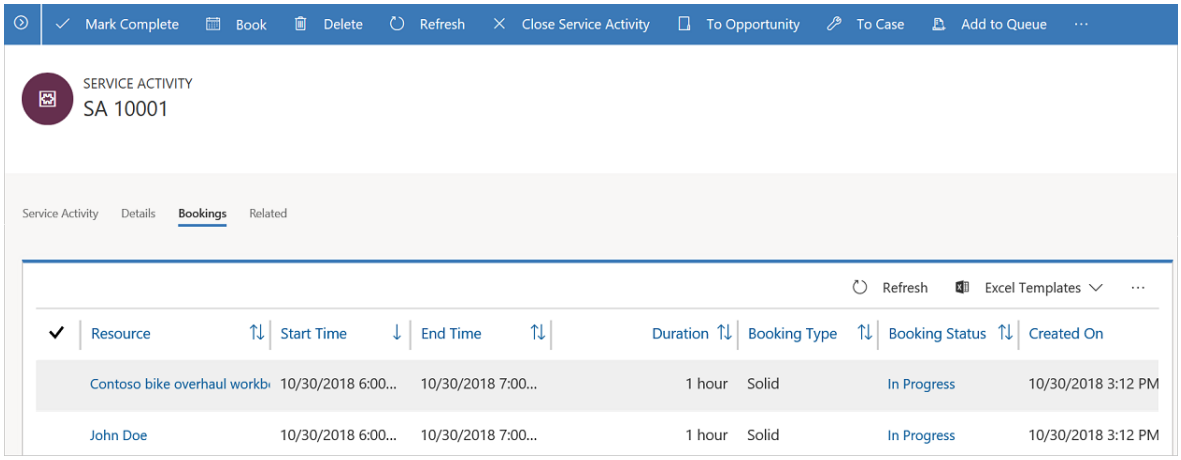
    - Select the **Booking Status** from the drop-down menu.

    - Select **Book** to schedule a service activity. Select **Book and Exit** to schedule and exit the tab.

      More information: Schedule a booking for a service activity



The bookings that you schedule appear in the **Bookings** tab.



You can select an existing booking and edit, activate, or deactivate it from the **Bookings** tab.

> **Note**
>
> - While creating a service activity, manual selection of resources isn't supported in the new scheduling experience in Customer Service Hub.
>
> - Once you've created a booking, the booking status won't be updated until you manually refresh the **Bookings** tab.

9. To close or cancel a service activity, select **Close Service Activity** from the command bar, and then select the status as **Closed or Canceled** in the **Close Service Activity** dialog box.

10. If the service activity has been completed, select **Mark Complete** from the command bar.

See also

Use the schedule board to configure service activity

Set fulfillment preferences to determine how results are displayed in Universal Resource Scheduling

Article • 03/10/2023

Fulfillment preferences customize how the schedule assistant will display results for single-day requirements. By default, the schedule assistant shows results based on resource schedules and the earliest available time. Fulfillment preferences include intervals and time groups, or a combination of them.

Intervals

Intervals define the length of the times slots the schedule assistant results will be displayed in, and the start time for subsequent bookings. For example, with 30-minute intervals, the schedule assistant will display a resource available at 9:27 AM as available at 9:30 AM and will book the start time (arrival time) for 9:30 AM. This includes travel time for onsite requirements and work orders, meaning travel time will begin before 9:30 AM, and a field resource will arrive and start work at 9:30 AM.

Time groups

Time groups enable schedulers to search and view results as blocks of time when using the schedule assistant. Unlike intervals, time groups don't influence the start time of subsequent booking. Unlike intervals, time groups **do not dictate the start time of subsequent bookings**. Time groups organize results, but leave the start time/arrival time as-is, based on the particular resource's schedule.

For example, a heating and cooling company wants to group air-conditioning installations in two blocks. They create morning (8:00 AM to 12:00 PM) and afternoon (1:00 PM to 5:00 PM) blocks, with a 1-hour break for lunch in between. They communicate a morning or afternoon time range to customers for when the installation crew arrives.

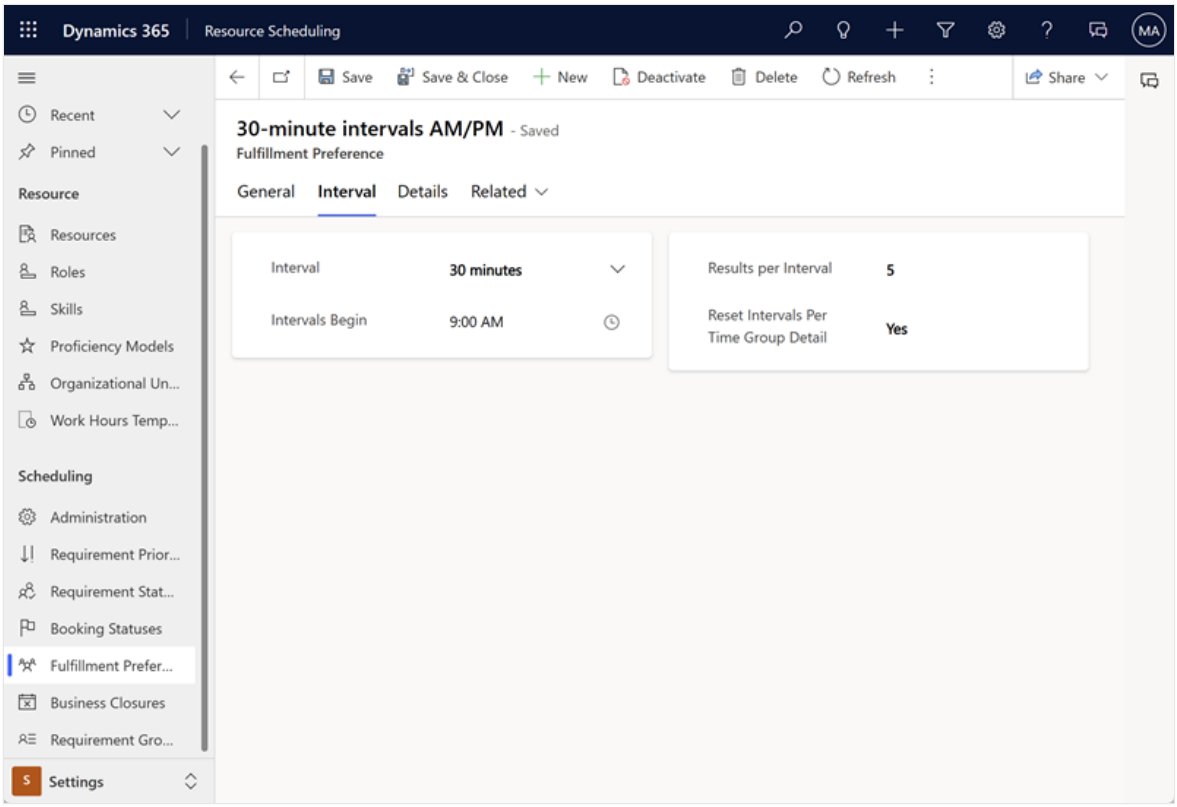
Create a fulfillment preference

1. In Universal Resource Scheduling, open the Settings area. Under **Scheduling**, select **Fulfillment Preferences** and select **New**.

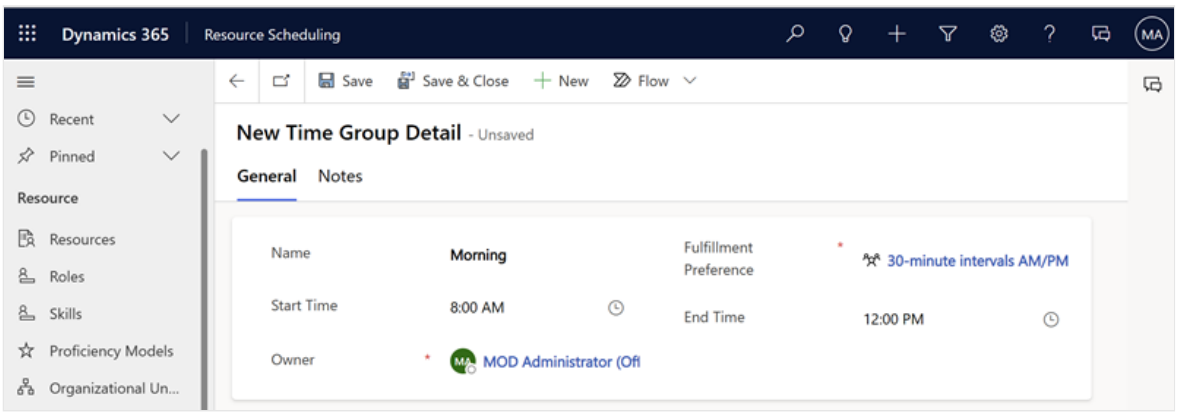
2. Enter a **Name** and **Save** the record.

3. To define an interval, go to the **Interval** tab.

    - Choose an **Interval** to define the duration between two available time slots.
    - Set the time for **Intervals begin** to define the start time for when options are available, depending on resource availability and working hours.
    - Enter the number of **Results per Interval** to limit how many options the system presents for a time slot.



4. To add a time group, go to the **Details** tab and select **New Time Group Detail**. Enter a **Name** and choose a **Start Time** and **End Time**.



Associate fulfillment preference to a requirement or requirement group

Open a requirement and go to the **Schedule** tab to choose the **Fulfillment Preference**. For a requirement groups, you can choose it in the **Fulfillment Preference** column.

Book a requirement

Open a resource requirement and select **Book** to schedule the requirement. You'll notice that the start and end times match the fulfillment preference you defined for the requirement.

Using intervals and time groups together

You can add both an interval and a time group to the same fulfillment preference, but this requires a few important considerations.

- Don't add a value for **Interval Begins**. The interval will begin at the time of the earliest time group.
- If the **Reset Interval per Time Group Detail** option is set to **Yes**, the intervals will reset once a new time group detail overlaps with an interval.

  For example, a business offers appointments every 90 minutes, so intervals are set to 90 minutes. Additionally, they separate into morning and afternoon time groups of 8:00 AM to 12:00 PM and 1:00PM to 5:00 PM, with a 1-hour lunch in between.

  - If the **Reset Interval per Time Group Detail** is set to **No**, the appointments would be:

    8:00 AM, 9:30 AM, 11:00 AM (not 12:30 PM because this is blocked for lunch), 2:00 PM, and 3:30 PM.

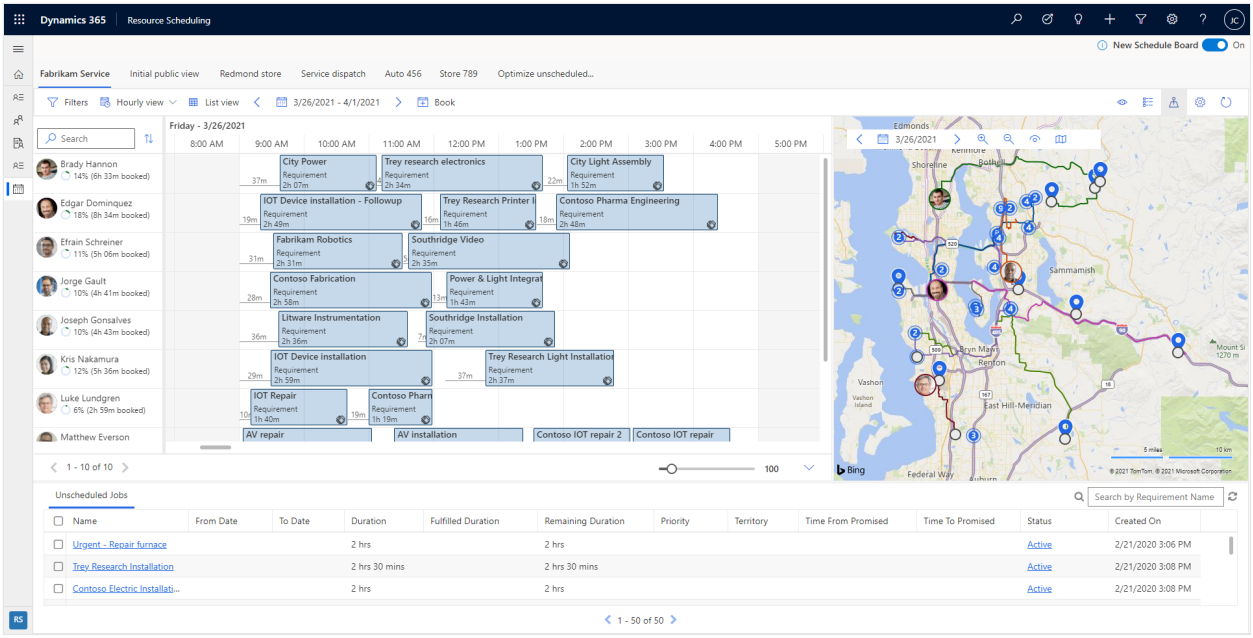
  - If the **Reset Interval per Time Group Detail** is set to **Yes**, the appointments would be:

    8:00 AM, 9:30 AM, 11:00 AM, (not 12:30 PM because this is blocked for lunch), **1:00 PM** (resetting for the next time group detail), 2:30 PM, and 4:00 PM.

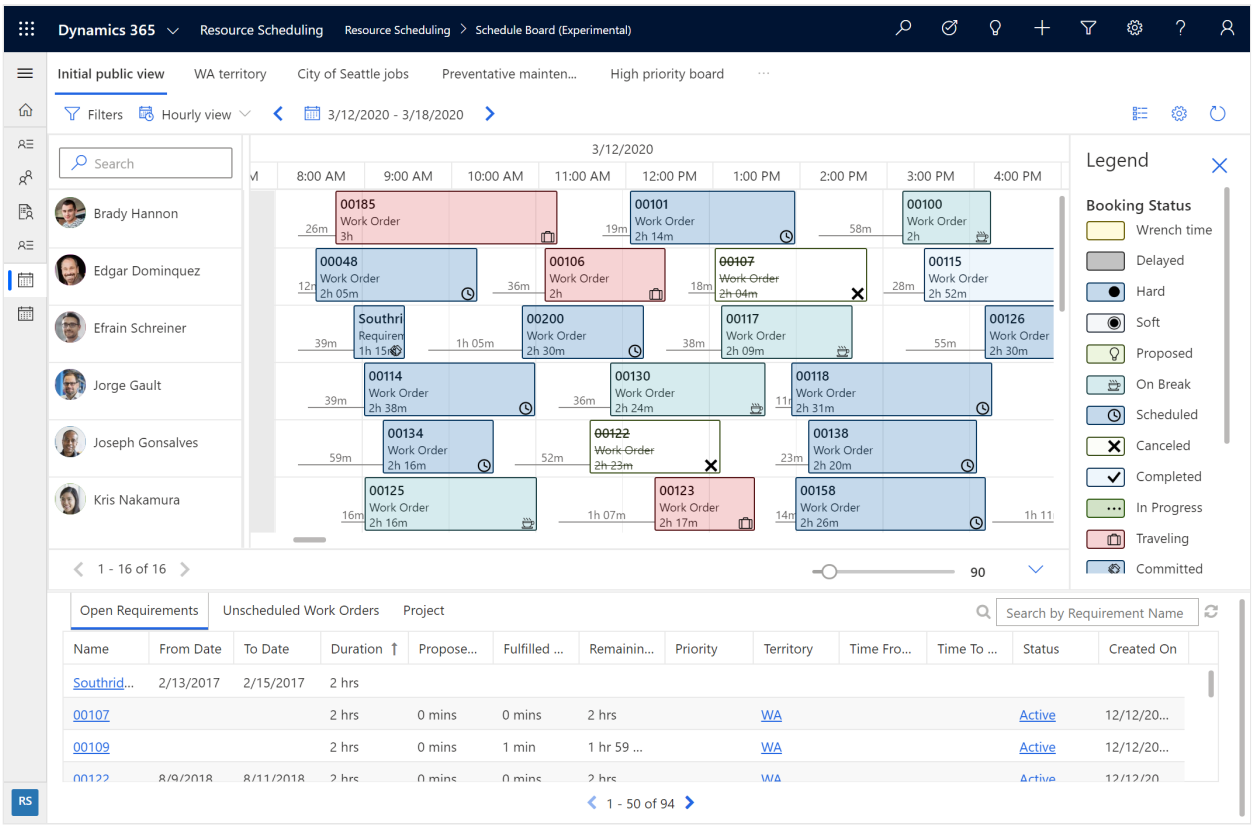
Use the schedule board to configure service activities

Article • 05/23/2022

In this article, we'll take a look at what's new and show you how to switch to the new schedule board in your environment.



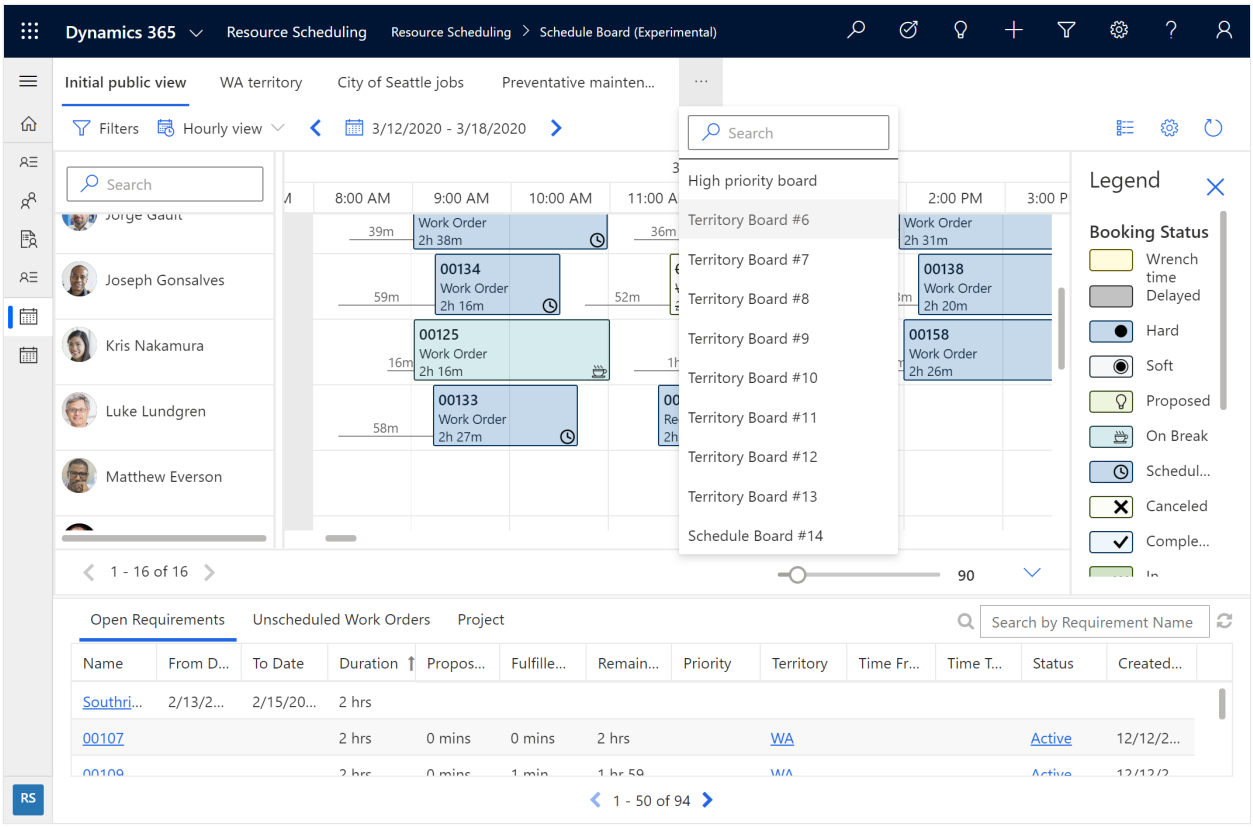
The new schedule board is faster, with better usability, and it lays the foundation for new capabilities for multi-day scheduling and intelligent interactions.



Performance

The new schedule board is faster and more responsive when you do the following tasks:

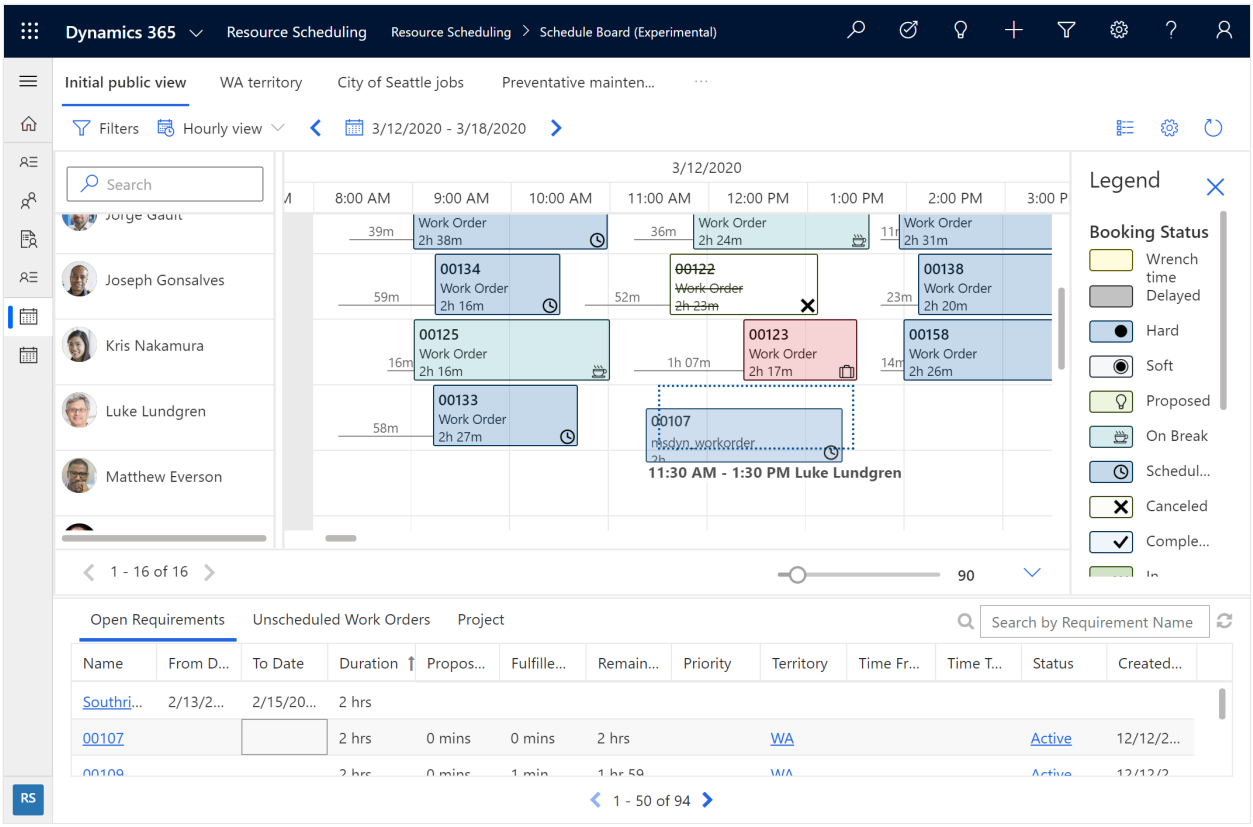
- Load the schedule board
- Select schedule board tabs
- Drag and drop service activities
- Reschedule bookings



Usability and accessibility

The new schedule board is a Power Apps Component Framework (PCF) control that's built on the Unified Client Interface, making it more flexible, supportable, and accessible. The new schedule board works better on different screen sizes and across form factors.

New color schemes and ways of depicting travel time make it easier for schedulers to see statuses and details.



For instance, the previous screenshot shows a new "ghost booking" feature that helps schedulers know if a booking will fit into a schedule before the booking is even scheduled.

Foundation for new capabilities

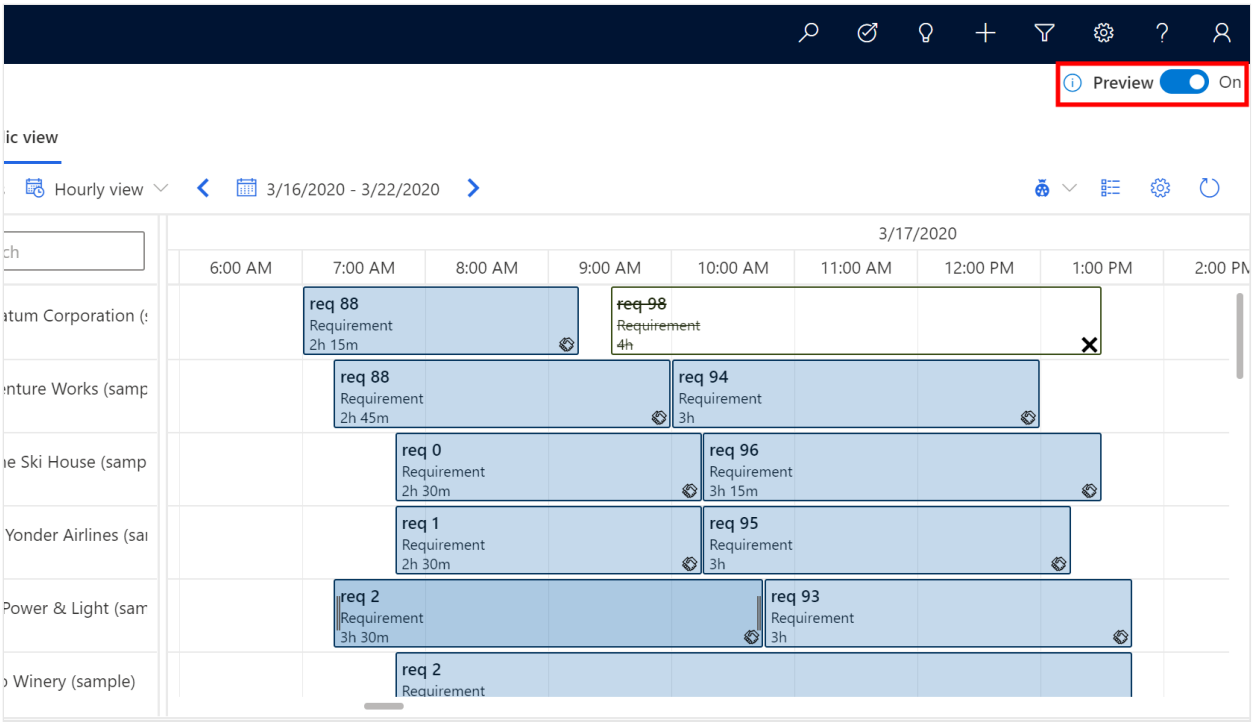
The new schedule board provides the foundation for future releases that will help provide schedulers with insights and recommendations for how to improve schedules.

Prerequisites

The next generation schedule board is generally available and requires that you have Dynamics 365 Customer Service.

Enable new schedule board

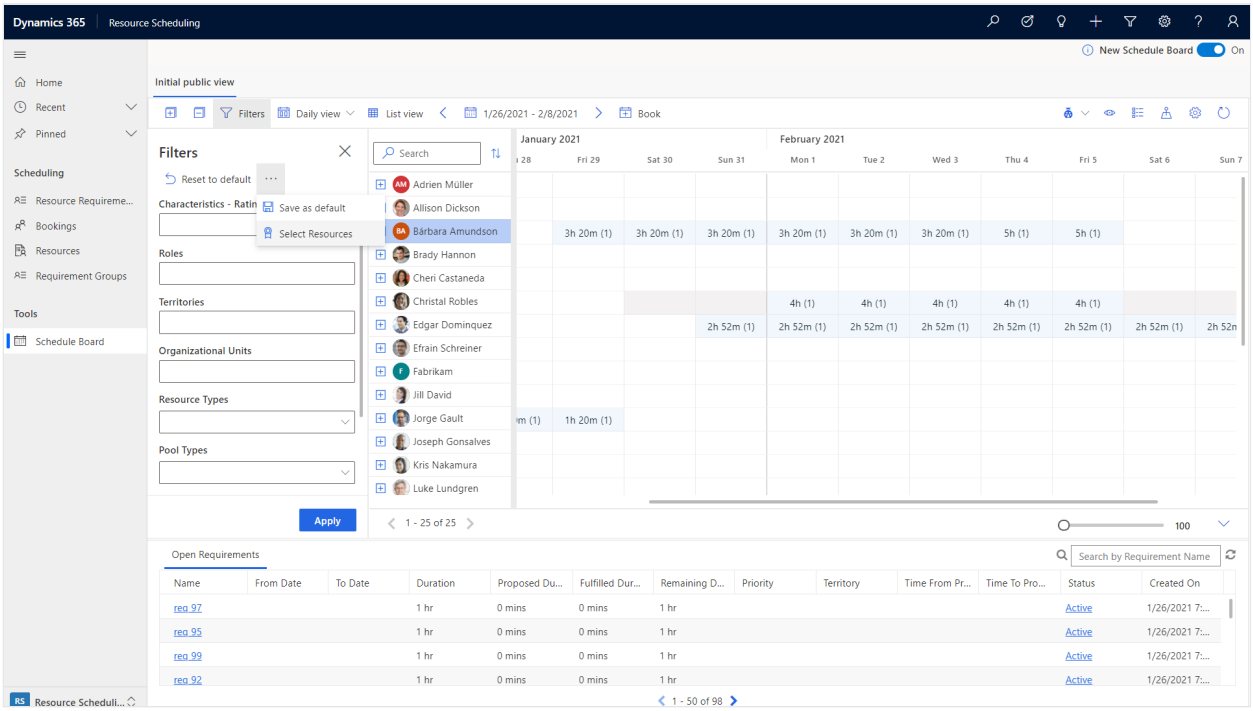
Go to the schedule board and use the toggle button in the top-right side of the schedule board to switch between the current and new schedule boards.



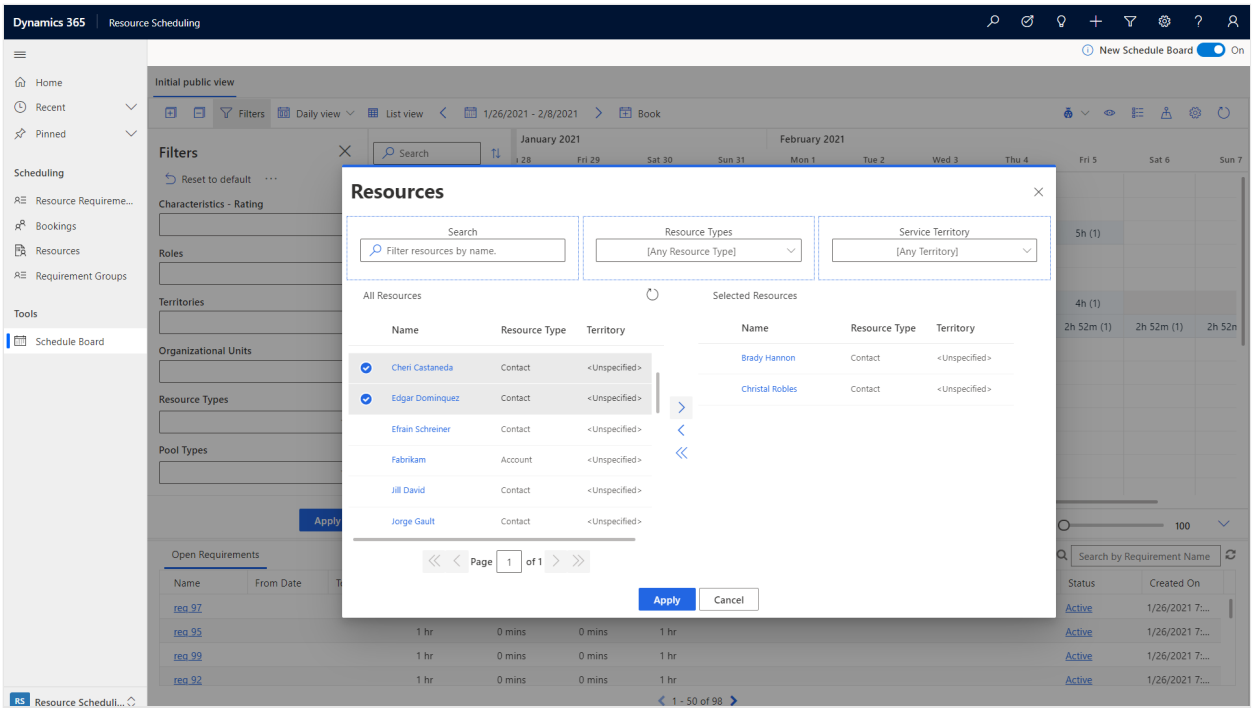
Select and filter resources

Choose which resources should display on each schedule board tab.

1. Expand the filter pane, and then choose **Select Resources**.

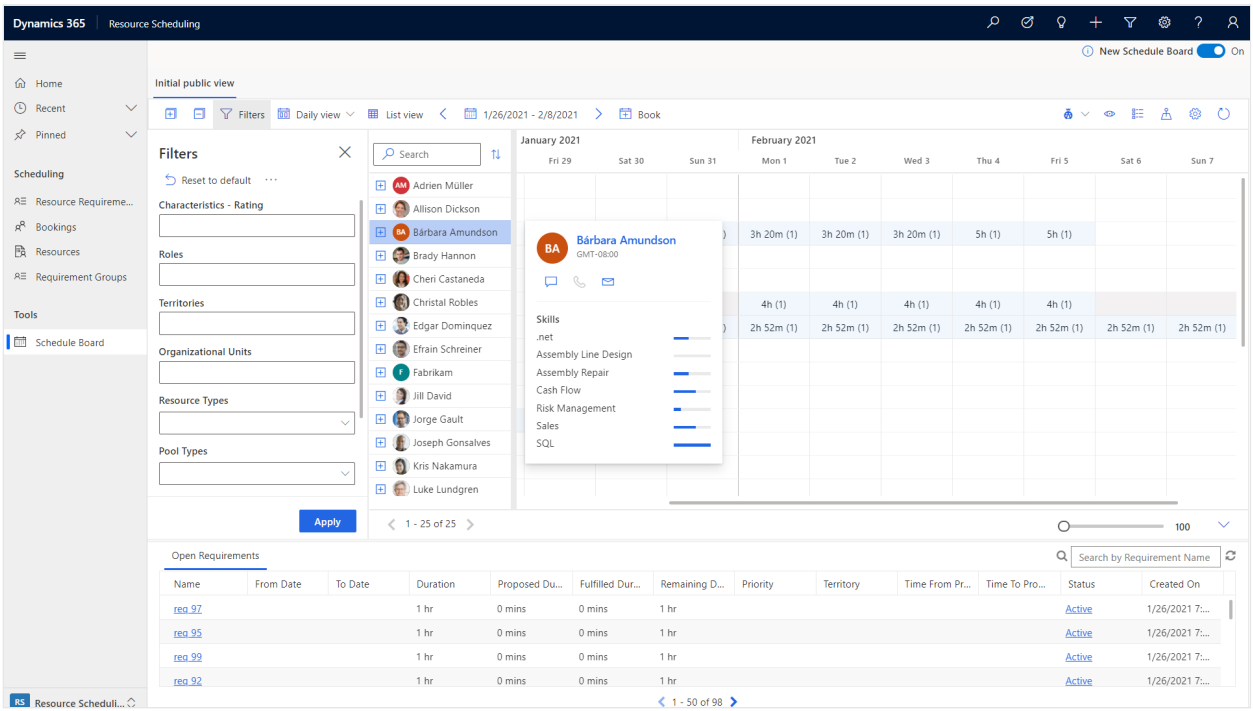


2. From the list of available resources on the left, move the ones you want to display on the schedule board to the right, and then select **Apply**.



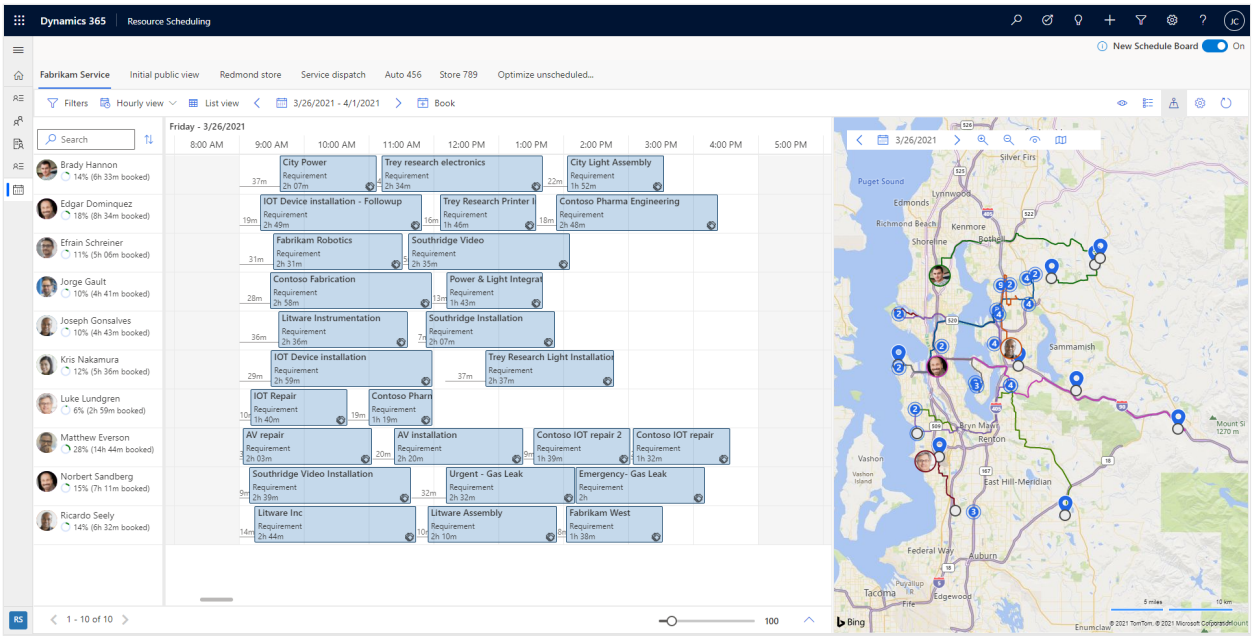
Resource cards

Right-click a resource's name and then choose **View Resource Card** to see more, like the resource's skill set (characteristics) and roles. From here, you can also initiate a message, email, or phone call.

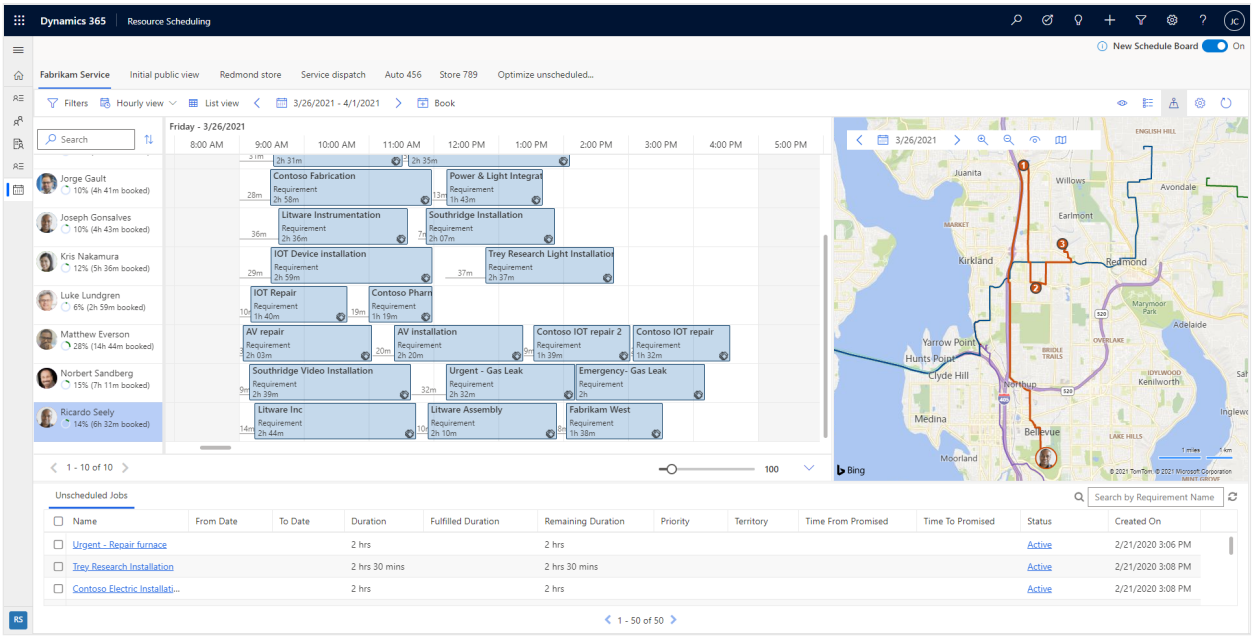


Map view of requirements and resources

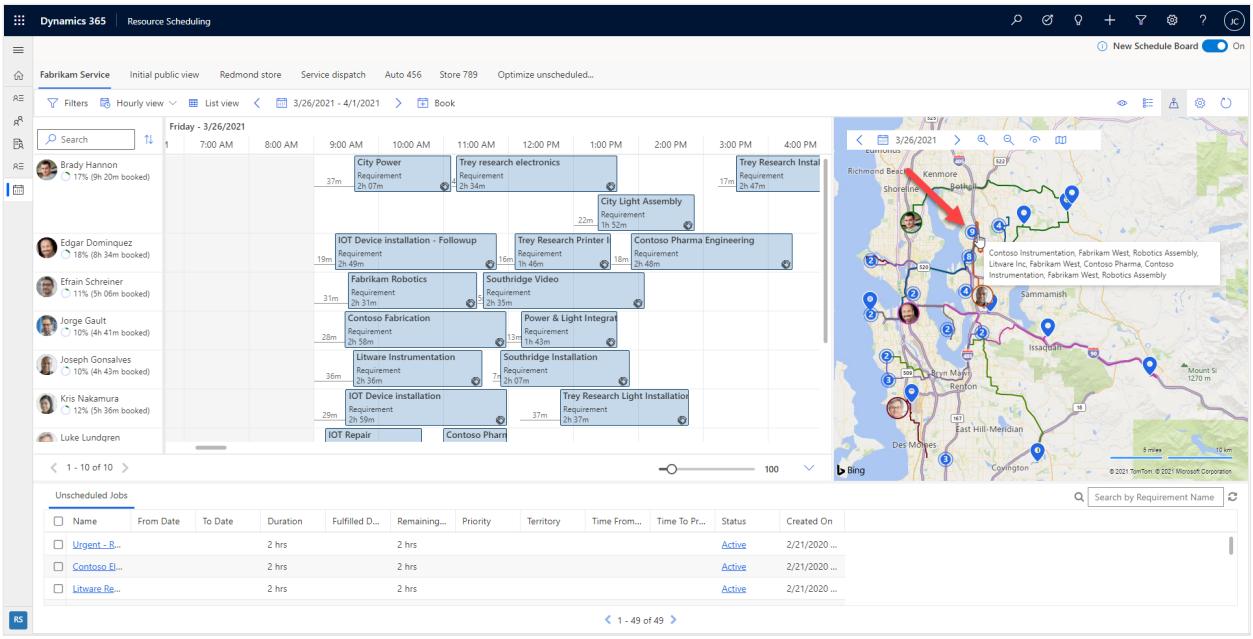
Select the map icon in the upper-right of the schedule board to display the resources and requirements on a map.



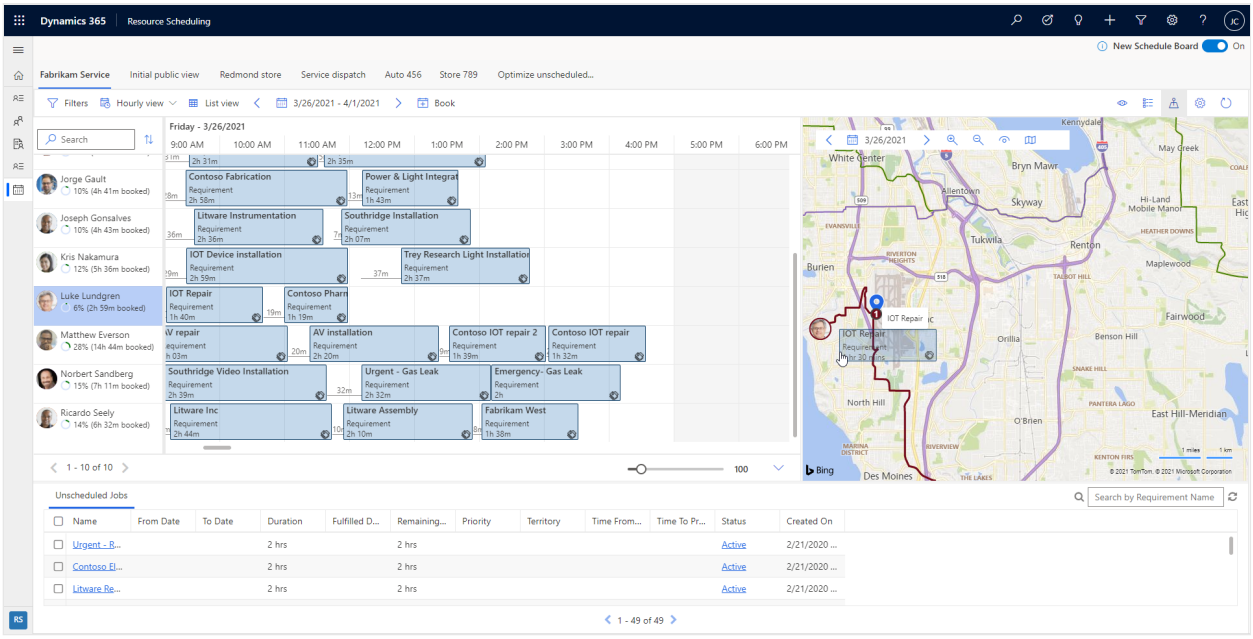
After expanding the map view, select a resource's name to see their route. The numbers indicate the order the resource is scheduled to arrive at each job (requirement) location.

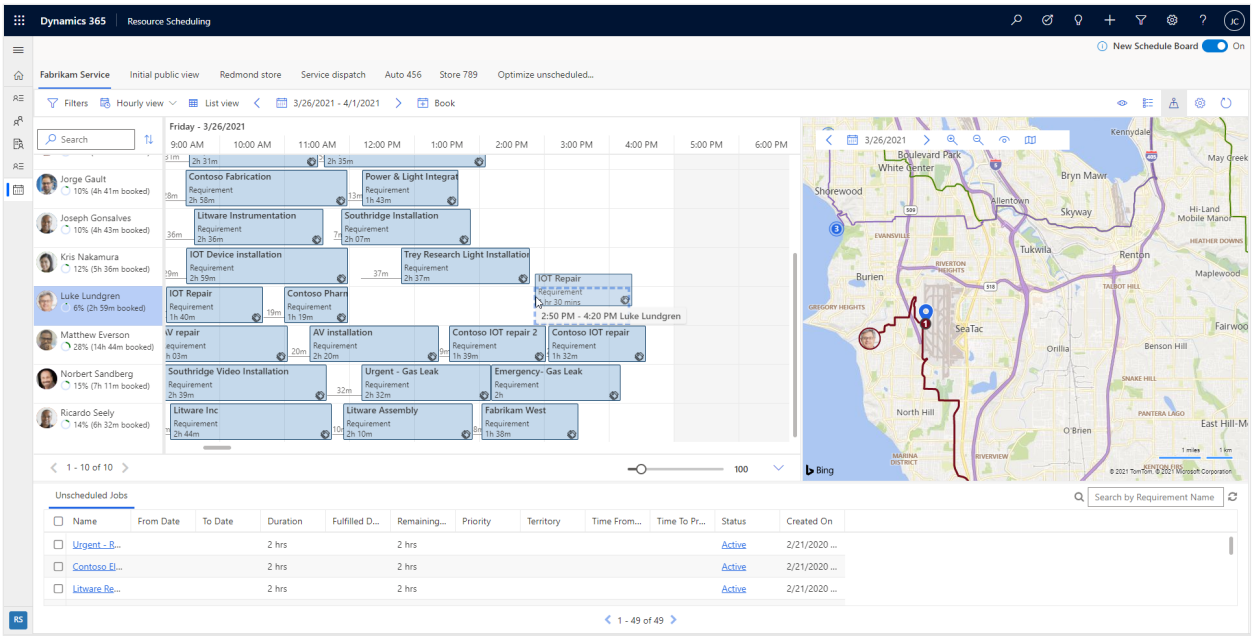


On a zoomed-out view of the map, the requirements and resources are grouped together, and you can see a count of requirements and resources. This count helps you quickly identify a geographical area with more unscheduled jobs, and then start scheduling the jobs to nearest resources.

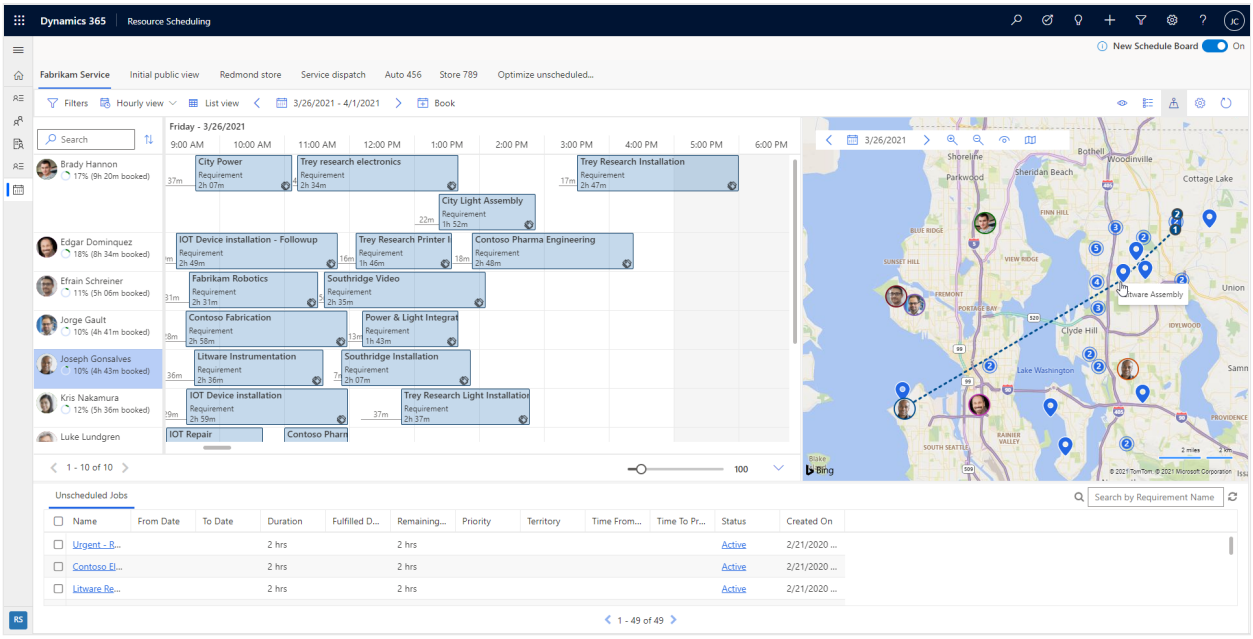


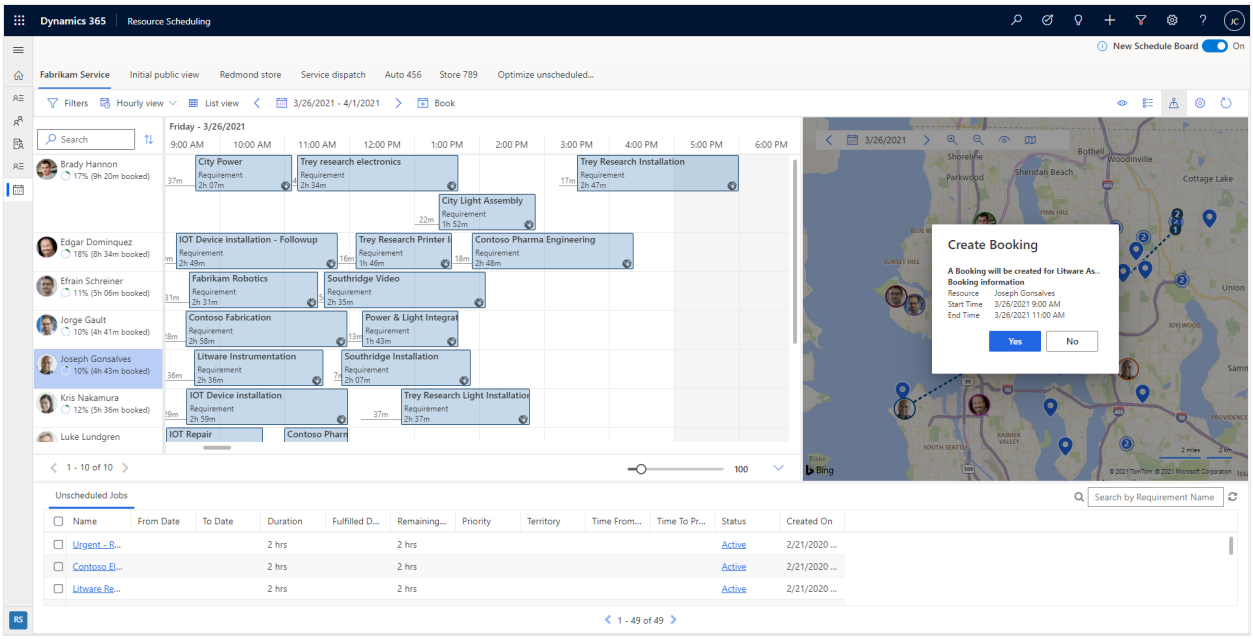
You can drag an unscheduled requirement pin from the map to the resource timeline and schedule it to that resource.





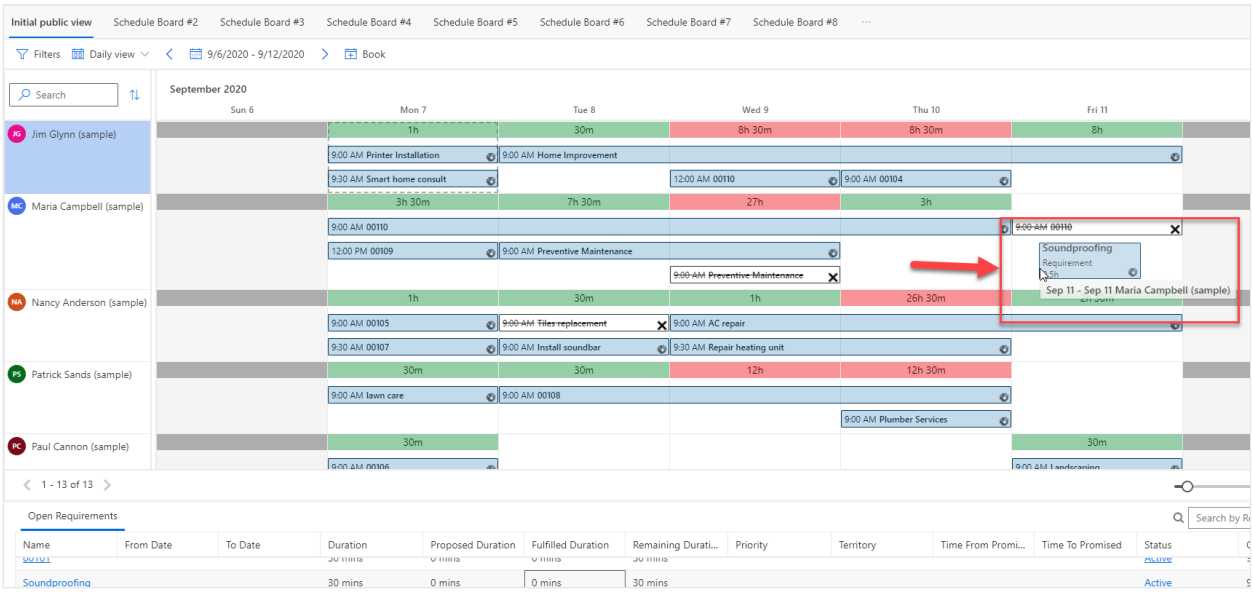
You can also drag the resource route to a nearby unscheduled requirement to schedule it and add it to the resource route.



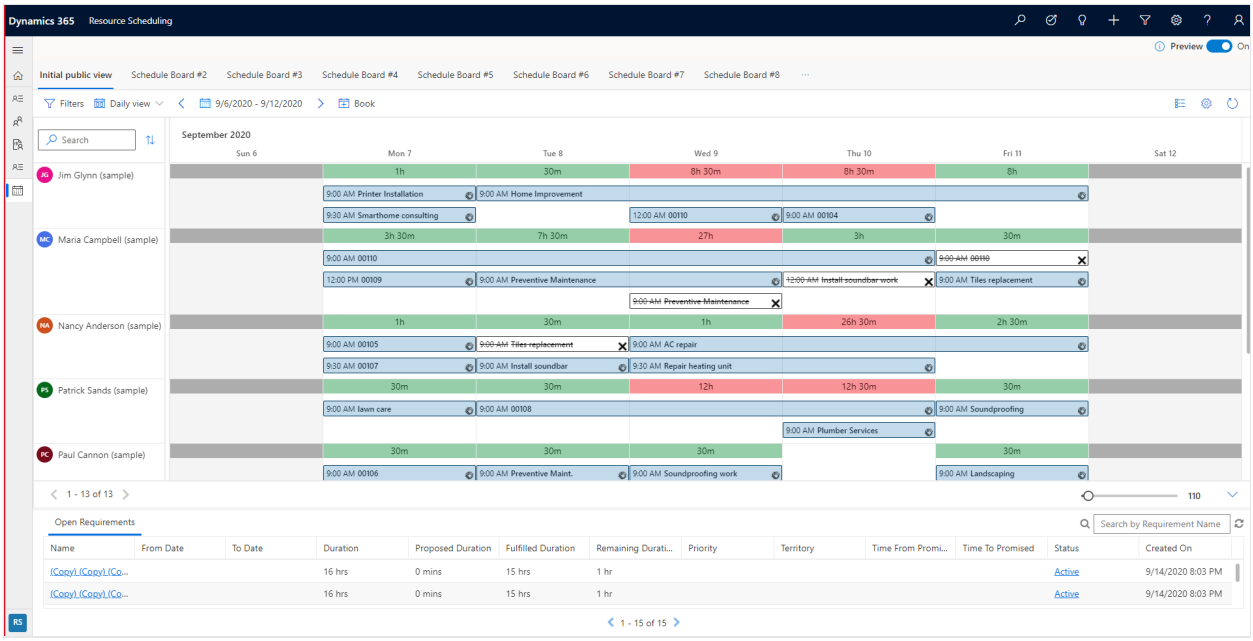


Daily view

The new schedule board supports a daily view of scheduled jobs, and supports dragging-and-dropping to the schedule.

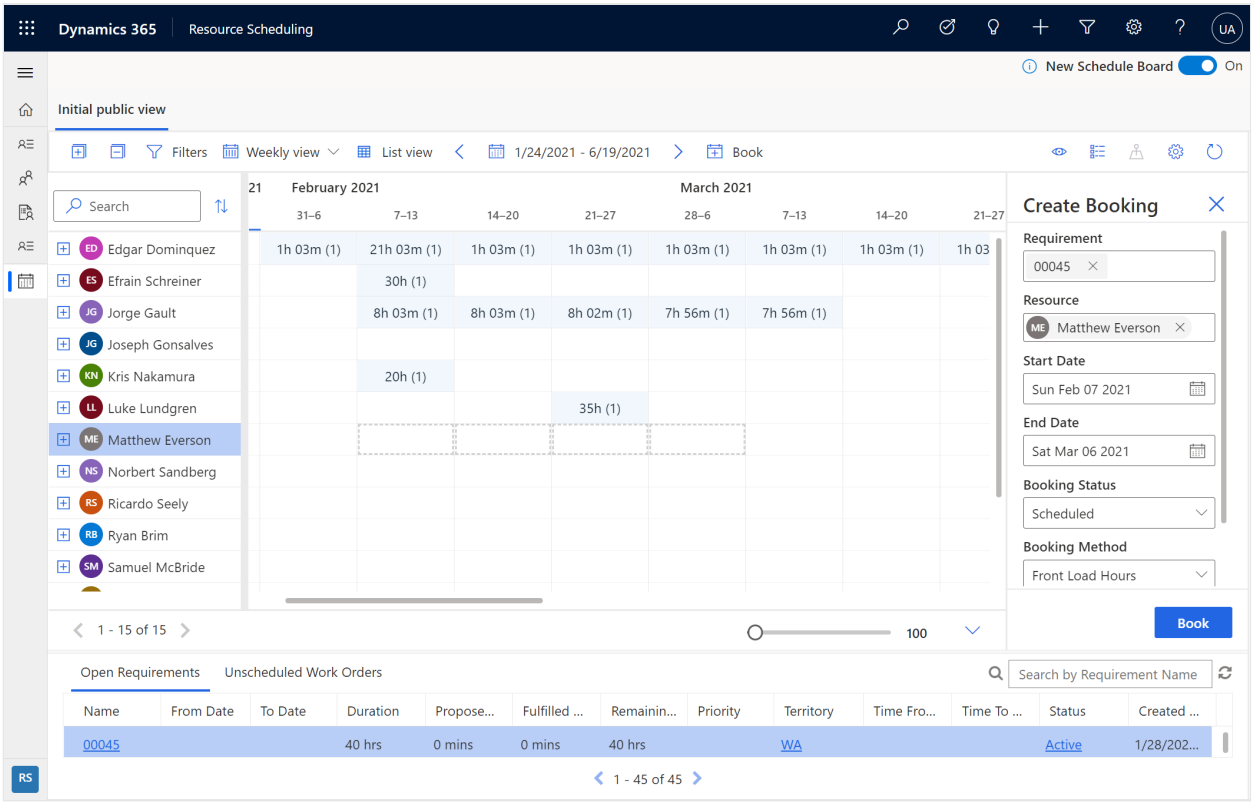


Scheduled requirements with a short duration will display across the entire day to make it easier to view details. Hover over the requirement or double-click it to see the actual duration.



Weekly and monthly views

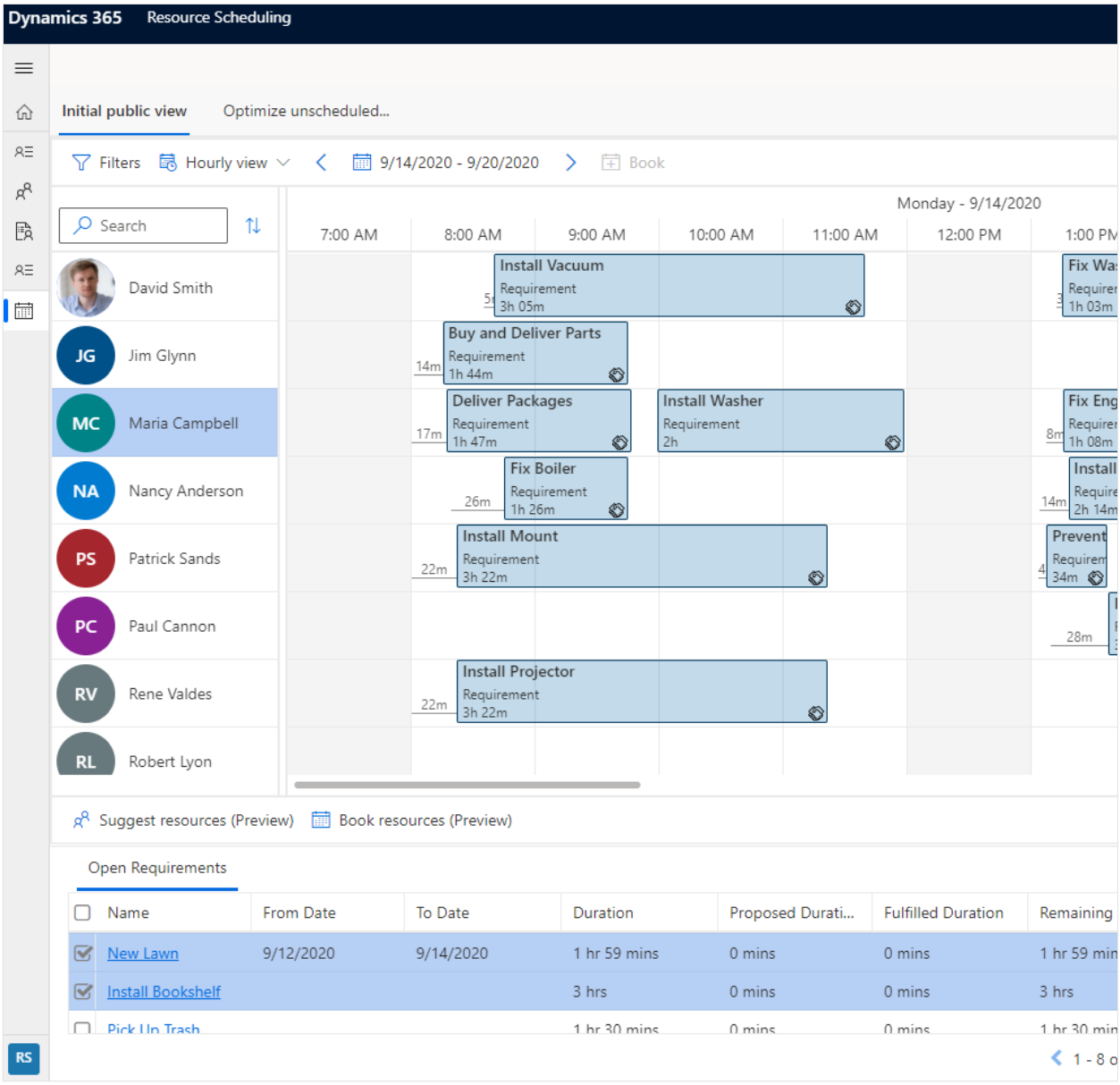
Switch to the weekly or monthly views to see scheduled jobs at a higher level. Select a resource's time slot and a requirement below to trigger the booking panel.



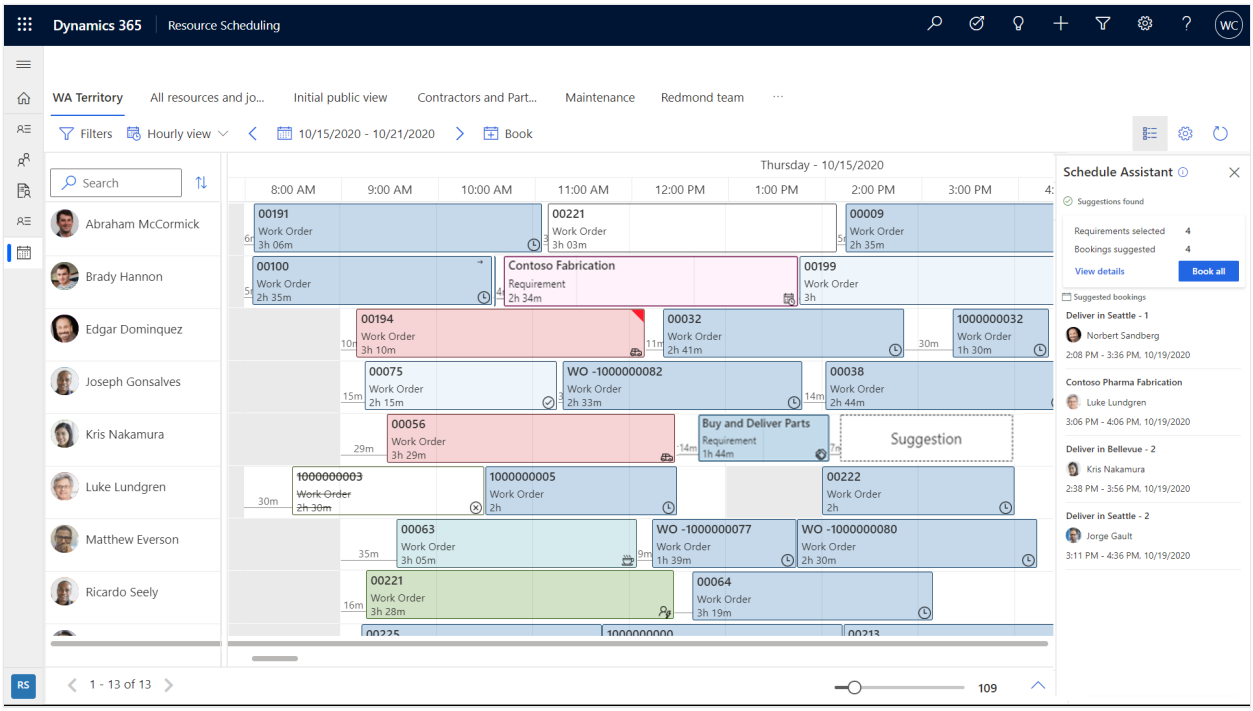
The booking panel will help you schedule a service activity across multiple days and choose how the work should be divided each day.

Schedule resources

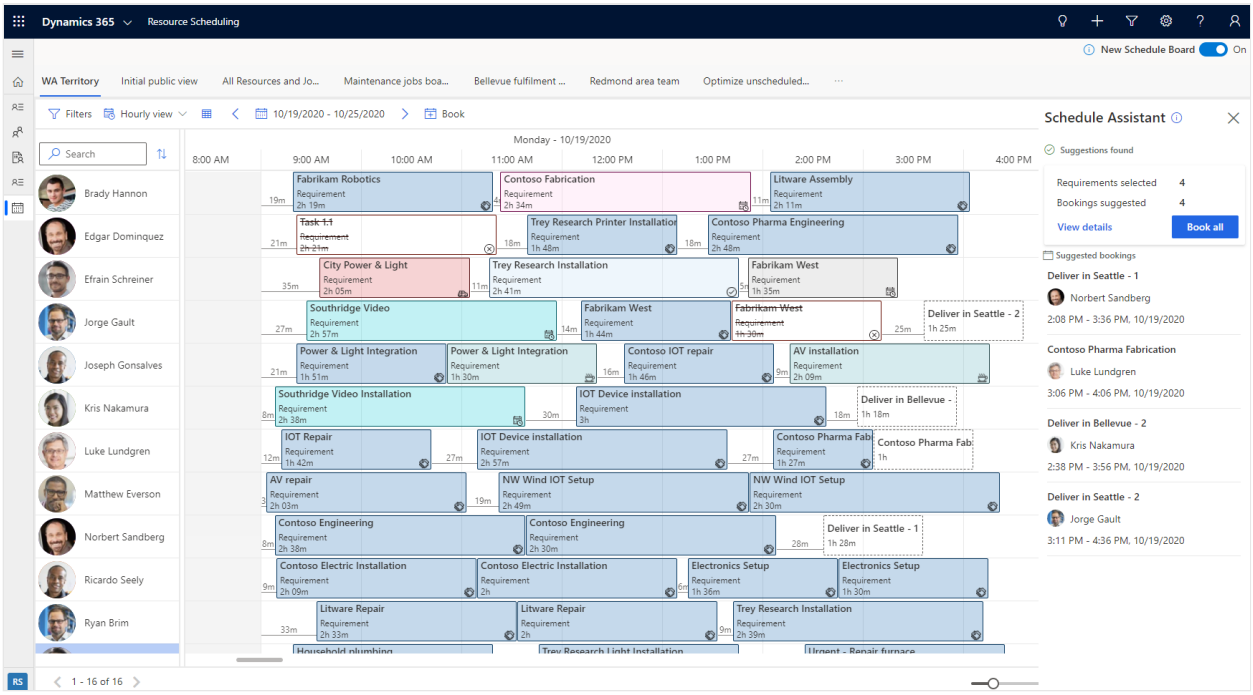
Beyond manual drag-and-drop scheduling, organizations that use resource scheduling optimization can select one or more requirements from the new schedule board and either have the system **Suggest resources** or **Book resources**. This feature is currently in Preview for the organizations that are using Resource Scheduling Optimization.



Selecting **Suggest resources** will display recommended resources in the right panel for the scheduler to book.

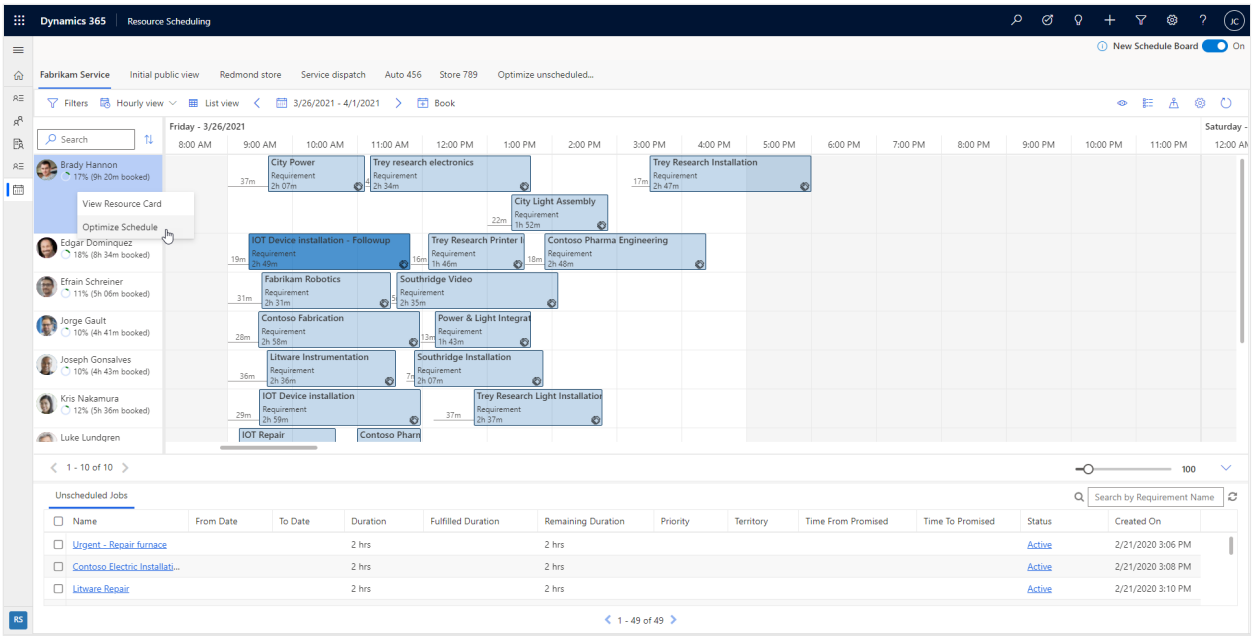


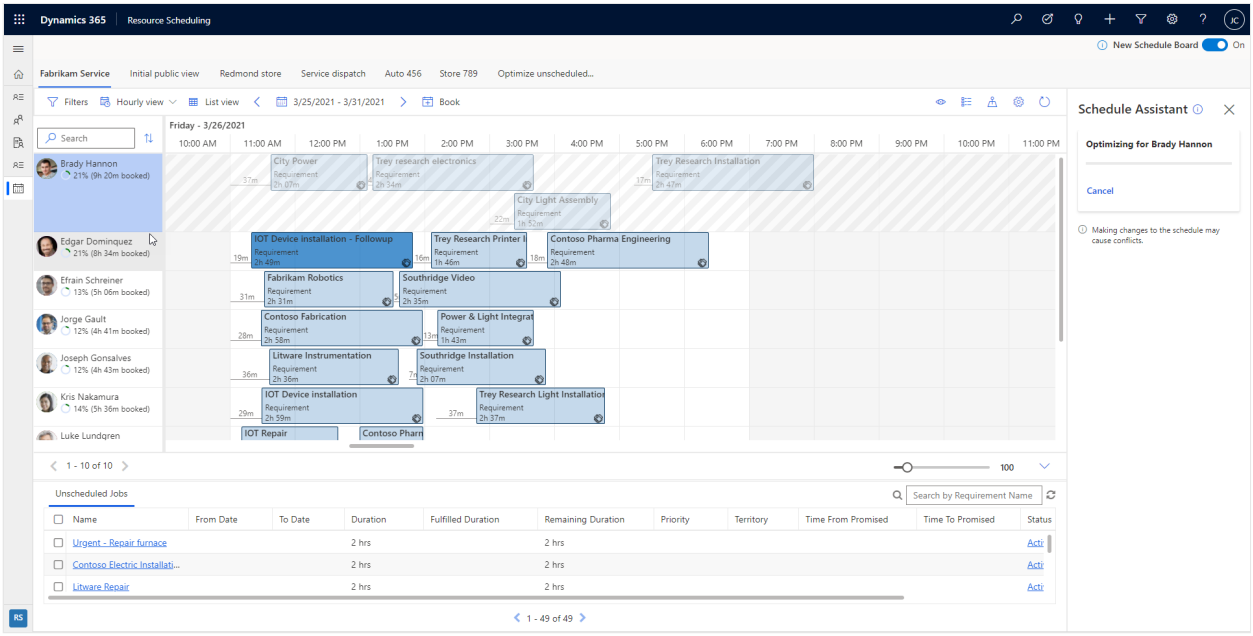
Selecting **Book resources** will find the most optimal resources and book them without further actions from the scheduler.

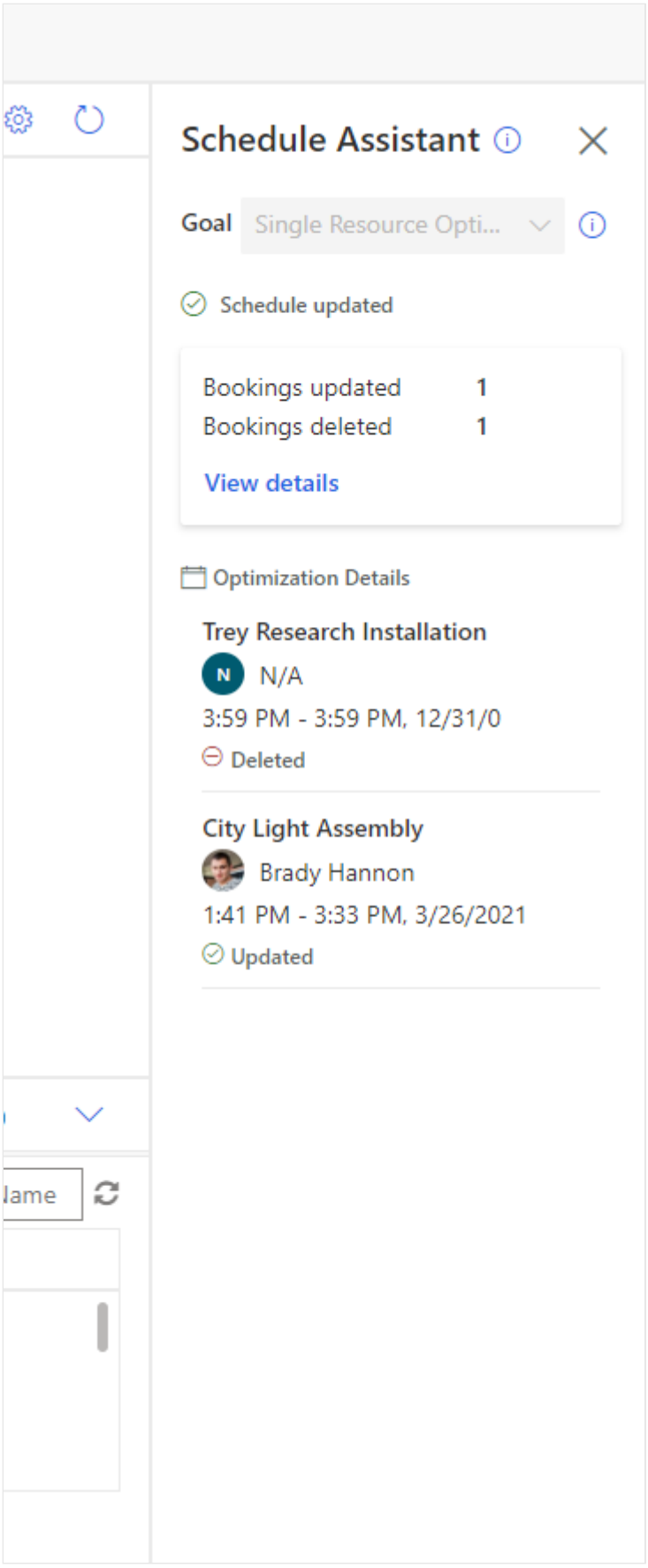


Suggest resources and **Book resource** capabilities on the new schedule board are currently only available for organizations using resource scheduling optimization.

Sometimes you might need to optimize only a single resource's schedule, rather than a set of available resources. Single resource optimization provides a quick way to reoptimize a resource's schedule and travel route after schedule changes have occurred during the day. This functionality is available on the new schedule board. You can right-click a resource from any schedule board view, and then select **Optimize Schedule**.


Dynamics 365
Resource Scheduling
New Schedule Board
On
Fabrikam Service
Initial public view
Redmond store
Service dispatch
Auto 456
Store 789
Optimize unscheduled...
Filters
Hourly view
List view
3/26/2021 - 4/1/2021
Book
Friday - 3/26/2021
Saturday -
8:00 AM
9:00 AM
10:00 AM
11:00 AM
12:00 PM
1:00 PM
2:00 PM
3:00 PM
4:00 PM
5:00 PM
6:00 PM
7:00 PM
8:00 PM
9:00 PM
10:00 PM
11:00 PM
12:00 AM
Search
Brady Hannon
17% (9h 20m booked)
View Resource Card
Optimize Schedule
Edgar Dominquez
18% (8h 34m booked)
Efrain Schreiner
11% (5h 06m booked)
Jorge Gault
10% (4h 41m booked)
Joseph Gonsalves
10% (4h 43m booked)
Kris Nakamura
12% (5h 36m booked)
Luke Lundgren
City Power
Requirement
2h 07m
Trey research electronics
2h 34m
Trey Research Installation
2h 47m
City Light Assembly
1h 52m
IOT Device installation - Followup
2h 49m
Trey Research Printer I
1h 46m
Contoso Pharma Engineering
2h 48m
Fabrikam Robotics
2h 31m
Southridge Video
2h 35m
Contoso Fabrication
2h 58m
Power & Light Integrat
1h 43m
Litware Instrumentation
2h 36m
Southridge Installation
2h 07m
IOT Device installation
2h 59m
Trey Research Light Installatio
2h 37m
IOT Repair
Contoso Pharn
1 - 10 of 10
100
Unscheduled Jobs
Search by Requirement Name
Name
From Date
To Date
Duration
Fulfilled Duration
Remaining Duration
Priority
Territory
Time From Promised
Time To Promised
Status
Created On
Urgent - Repair furnace
2 hrs
2 hrs
Active
2/21/2020 3:06 PM
Contoso Electric Installati...
2 hrs
2 hrs
Active
2/21/2020 3:08 PM
Litware Repair
2 hrs
2 hrs
Active
2/21/2020 3:10 PM
1 - 49 of 49
RS


Dynamics 365
Resource Scheduling
New Schedule Board
On
Fabrikam Service
Initial public view
Redmond store
Service dispatch
Auto 456
Store 789
Optimize unscheduled...
Filters
Hourly view
List view
3/25/2021 - 3/31/2021
Book
Schedule Assistant
Optimizing for Brady Hannon
Cancel
Making changes to the schedule may cause conflicts.
Friday - 3/26/2021
10:00 AM
11:00 AM
12:00 PM
1:00 PM
2:00 PM
3:00 PM
4:00 PM
5:00 PM
6:00 PM
7:00 PM
8:00 PM
9:00 PM
10:00 PM
11:00 PM
Search
Brady Hannon
21% (9h 20m booked)
Edgar Dominquez
21% (8h 34m booked)
Efrain Schreiner
13% (5h 06m booked)
Jorge Gault
12% (4h 41m booked)
Joseph Gonsalves
12% (4h 43m booked)
Kris Nakamura
14% (5h 36m booked)
Luke Lundgren
City Power
Requirement
2h 07m
Trey research electronics
2h 34m
Trey Research Installation
2h 47m
City Light Assembly
1h 52m
IOT Device installation - Followup
2h 49m
Trey Research Printer I
1h 46m
Contoso Pharma Engineering
2h 48m
Fabrikam Robotics
2h 31m
Southridge Video
2h 35m
Contoso Fabrication
2h 58m
Power & Light Integrat
1h 43m
Litware Instrumentation
2h 36m
Southridge Installation
2h 07m
IOT Device installation
2h 59m
Trey Research Light Installatio
2h 37m
IOT Repair
Contoso Pharn
1 - 10 of 10
100
Unscheduled Jobs
Search by Requirement Name
Name
From Date
To Date
Duration
Fulfilled Duration
Remaining Duration
Priority
Territory
Time From Promised
Time To Promised
Status
Urgent - Repair furnace
2 hrs
2 hrs
Acti
Contoso Electric Installati...
2 hrs
2 hrs
Acti
Litware Repair
2 hrs
2 hrs
Acti
1 - 49 of 49
RS

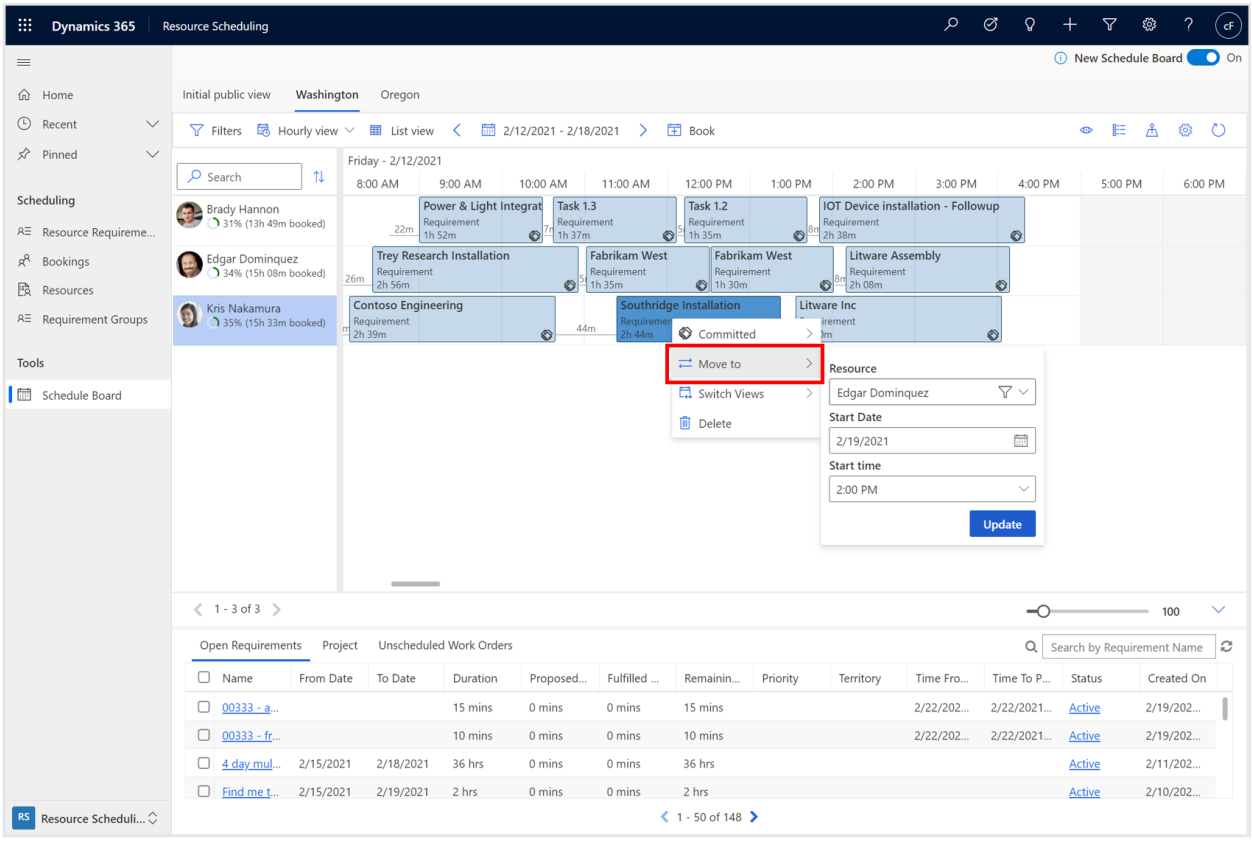


Move bookings to a new resource, a new start date and time, or both

With Customer Service, the new schedule board provides an easy way to reassign and reschedule bookings in the same action. Bookings can be moved to resources on the current schedule board tab, or to resources on other schedule board tabs.

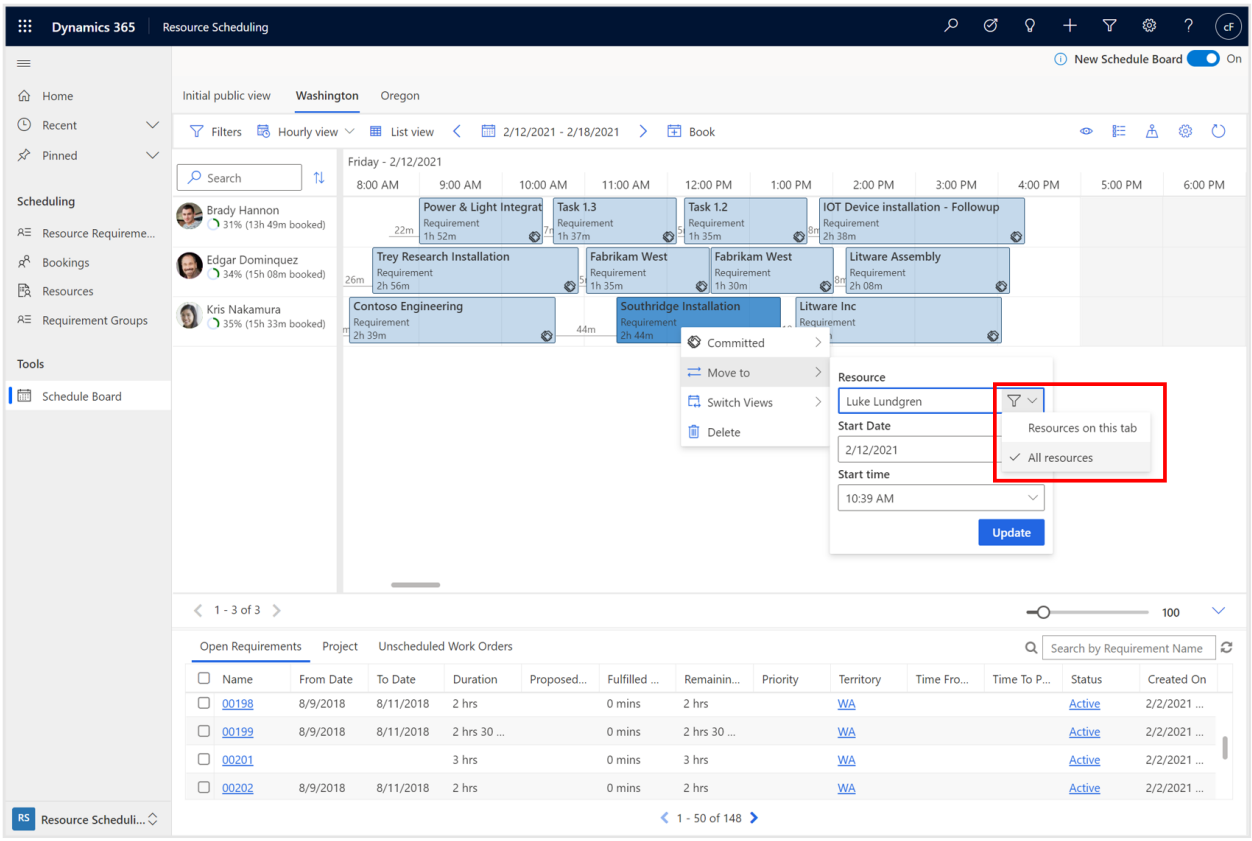
Move a booking to a resource on the current schedule board tab, or change the start date/time, or both

1. Right-click a booking, and then select **Move to**.
2. Reassign the booking to any resource on the current schedule board tab, or change the start date and the start time of the booking.
3. Select **Update** to apply the changes.



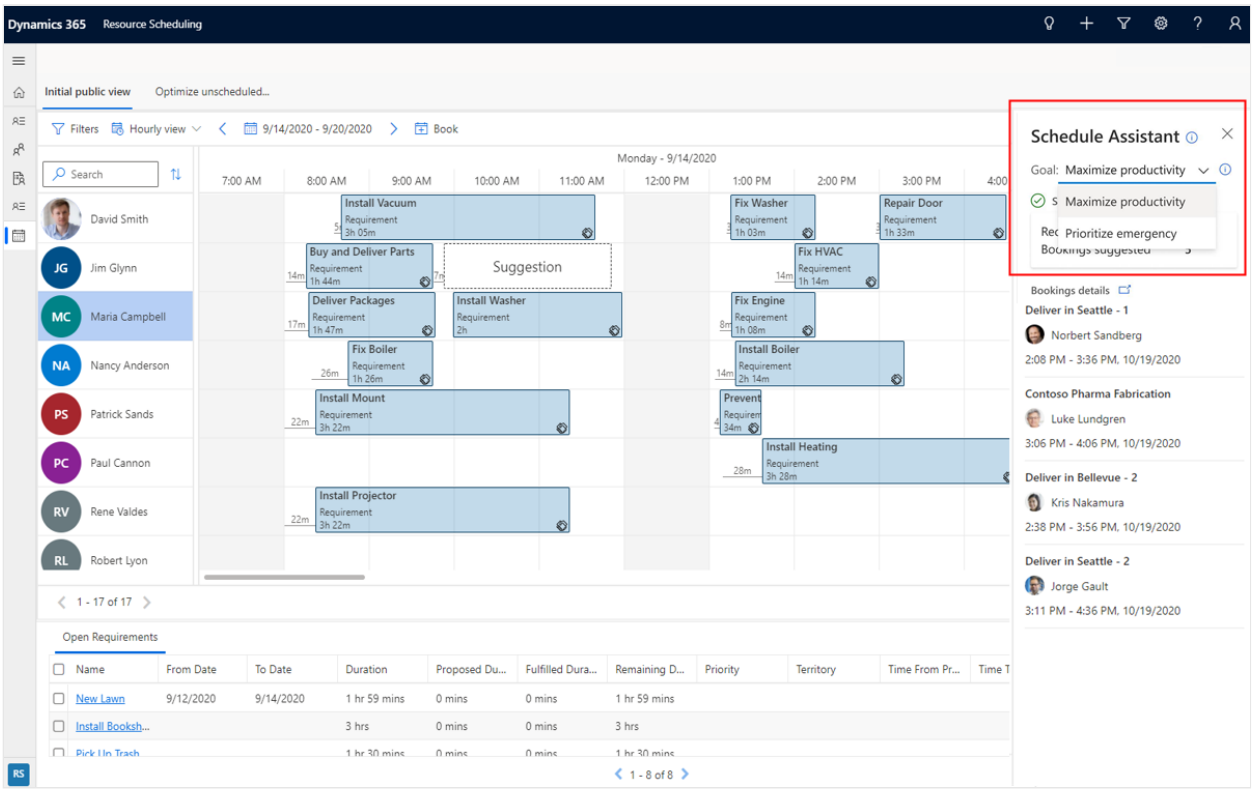
Move a booking to a resource on a different schedule board tab, or change the start date or time, or both

1. Right-click the booking, and then select **Move to**.
2. Select the filter icon in the resource field, and then change the filter from **Resources on this tab** to **All resources**. Now, you can reassign this booking to any resource on any tab, and change the start date and start time of the booking.
3. Select **Update** to apply the changes.



Automatic scheduling with optimization goals

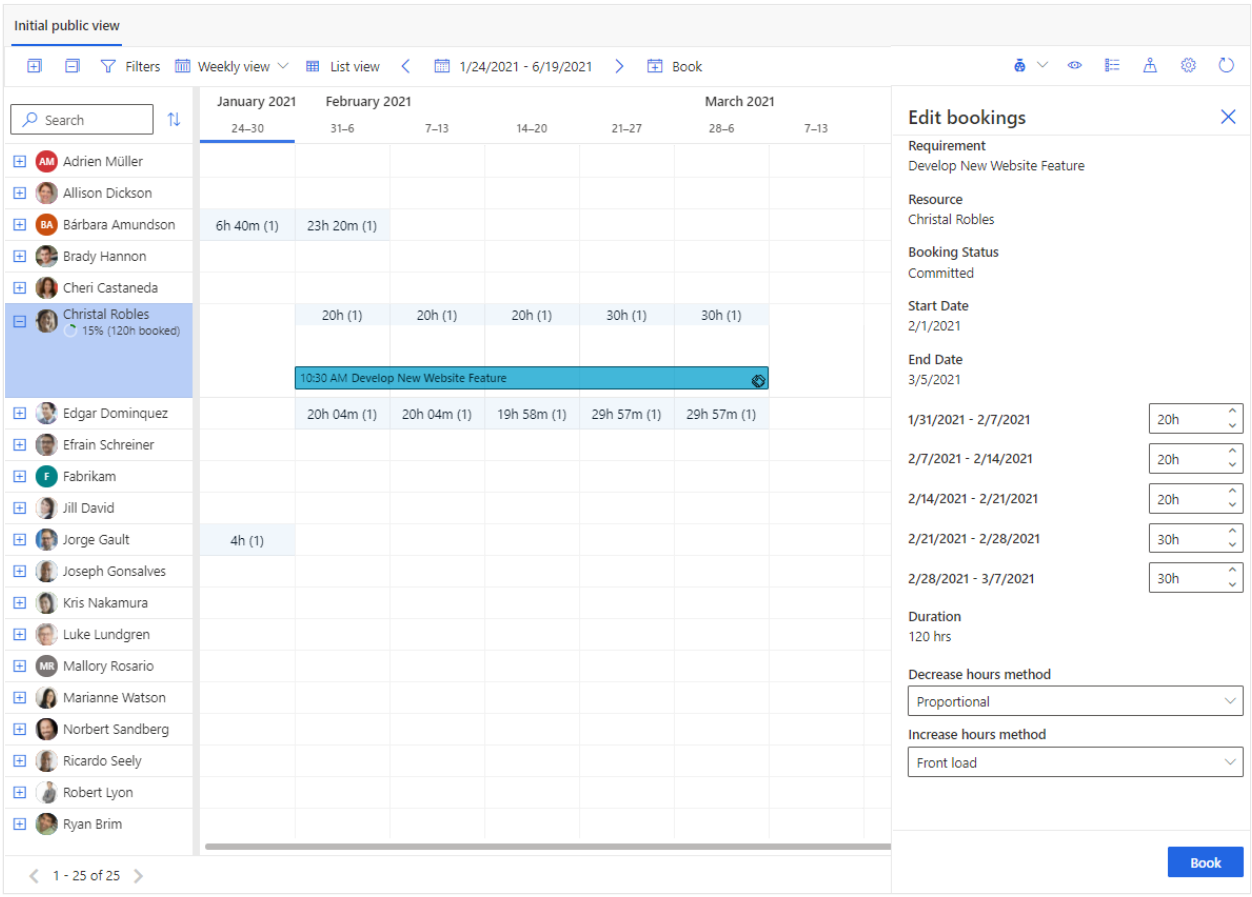
The schedule board supports optimization goals. After selecting suggested resources, schedulers can edit the optimization goal, which dictates how resources are recommended.



There's a default optimization goal that applies to the entire system and serves as the default for optimization requests. Schedulers can also edit the default optimization goal for each schedule board. Finally, schedulers can edit the optimization goal for a single optimization request by selecting **Suggest Resources**.

Edit multi-day bookings

After you've created a multi-day booking across multiple days, weeks, or months, you can right-click the booking, select edit, and change how many hours are assigned for each day, week, or month via the booking panel on the right.



Use the appointments feature in resource scheduling

Organizations often use appointments in Dynamics 365. For example, an agent might create a service appointment to help a customer with an issue. Other examples include organizations creating appointments because of integrations with other systems.

Dynamics 365 Appointments (Microsoft Dataverse appointments) can be displayed on the Customer Service schedule board alongside bookings, and can be considered during scheduling to understand whether an agent or bookable resource is available.

For information on how to configure and use appointment scheduling, see Include appointments in scheduling.

Configuration considerations

- The new schedule board is currently supported on Microsoft Edge, Chrome, and Firefox browsers.

When to use the new versus current schedule board

The new schedule board is recommended for manual scheduling scenarios and for organizations that want to get up and running with a scheduling solution for schedulers. The new schedule board is designed and built to deliver improved performance and usability. Users who perform drag-and-drop scheduling or users who only need to see the schedule board can use the new schedule board during preview. Also, organizations using resource scheduling optimization should consider using the new schedule board because the resource scheduling optimization capabilities are embedded.

The in-market schedule board is recommended for more complex scheduling scenarios like assisted scheduling, multi-resource scheduling, using requirement groups, and so on.

Use the following feature comparison table to understand which version of the schedule board is right for your business.

Feature	Category	New schedule board	Old schedule board	Details
Manual scheduling	Scheduler	Yes	Yes	Scheduler can manually select a resource and create a booking for an unscheduled requirement by interactions like dragging and dropping the requirements, selecting an open timeslot, and using booking panel.
Assisted scheduling	Scheduler	2021 release wave 2	Yes	Scheduler can select an unscheduled requirement on the requirement panel and select "Find Availability," which opens up the schedule assistant view, and shows the available timeslots for the available resources. Scheduler can choose a timeslot and create a booking.

Feature	Category	New schedule board	Old schedule board	Details
Automated scheduling	Scheduler	For existing resource scheduling optimization customers, public preview is available.	No	The default capabilities of resource scheduling optimizer functionality are made available in the schedule board, enabling schedulers to manage schedules from a requirement's or resources point of view with the organization's business goals applied automatically by the optimizer.
Auto update travel time	Scheduler	Yes	Yes	When a booking is manually scheduled or rescheduled via drag-and-drop, the travel time from the resource's previous location is automatically calculated and displayed in the front of the booking.
View modes - Hourly, daily	Scheduler	Yes	Yes	Show the resources and their bookings on the hourly and daily views of the schedule board.
View modes - Weekly, monthly	Scheduler	Yes	Yes	Show the resources and their bookings on the weekly and monthly views of the schedule board.
View types - List view	Scheduler	Yes	Yes	List view is a simple view, in which bookings of the resources are shown as a simple list. This list view provides accessible view to the Users to browse and create Bookings
View types - Map view	Scheduler	Yes	Yes	
View types - Details view	Scheduler	2021 release wave 2	Yes	Details view is a configurable view, to show and add details of a resource, requirement, or a booking record.
Multi-resource scheduling	Scheduler	2021 release wave 2	Yes	Requirement groups allow you to define groups of resources that would be appropriate for a job and to then schedule all those resources with a single search. With requirement groups, you can mix and match the different types of resources—such as individual field technicians, a whole crew, equipment, or facilities—needed for a job

Feature	Category	New schedule board	Old schedule board	Details
Multi-day assisted scheduling	Scheduler	2021 release wave 2	Yes	Service activities and scheduling requirements can be scheduled across multiple days and weeks. A common example is scheduling a 40-hour service activity across an entire work week where the field technician is expected to perform more detailed work at the same location each day.
Multi-day manual scheduling	Scheduler	Yes	Yes	Service activities and scheduling requirements can be scheduled across multiple days and weeks. A common example is scheduling a 40-hour service activity across an entire work week where the field technician is expected to perform more detailed work at the same location each day.
Pools and crews	Scheduler	2021 release wave 2	Yes	Resource pool scheduling allows you to assemble groups of similar resources to manage capacity and give schedulers the option to assign specific resources at a later time. Resource crews allow schedulers to search and schedule multiple resources at once. Crews can include a group of employees, subcontractors, equipment, facilities, or any combination thereof who will perform the same work during a period of time. Crews speed up and simplify the scheduling process and allow team members to work together more consistently.
Configuration	Admin	2021 release wave 2	Yes	Admin can create new tabs on the schedule board and configure changes on the board, tab settings, and scheduler settings

Feature	Category	New schedule board	Old schedule board	Details
Extensibility	Admin	2021 release wave 2	Yes	Admin can extend the schedule board and use extensibility on some of features like Custom Booking template (Hours) - HTML Custom Booking alerts - HTML Custom Resource Cell Template - HTML Custom Filter Layout - Universal FetchXML SB/SA Retrieve Resources Query - Universal FetchXML SB/SA Retrieve Constraints query - Universal FetchXML Custom Web resource support Client Extensions (support for JavaScript, style sheets, and Localizations files) Booking Rules (Support for custom business logic via JavaScript on the booking creation)

Continue to use the current schedule board for common functions like:

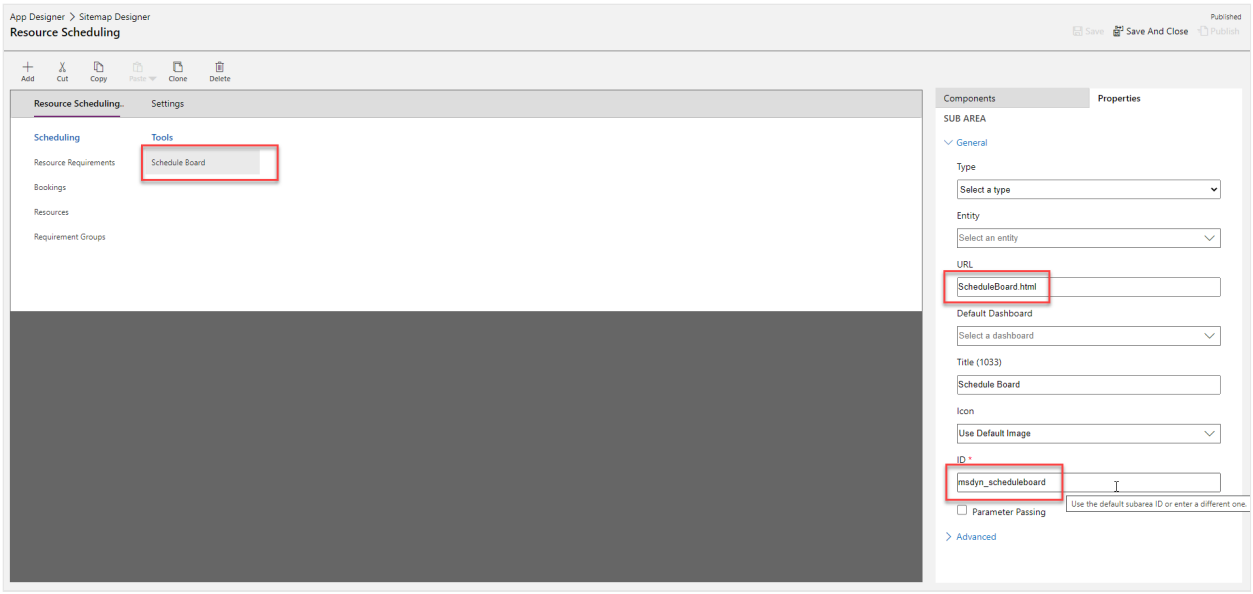
- Creating and deleting schedule board tabs.
- Schedule board tab settings.
- Schedule board configurations like number of days in a view or applying filter territories.

Add new schedule board to custom sitemap area

When using a custom sitemap or an app module, you'll need to update the sitemap to consume the new schedule board preview.

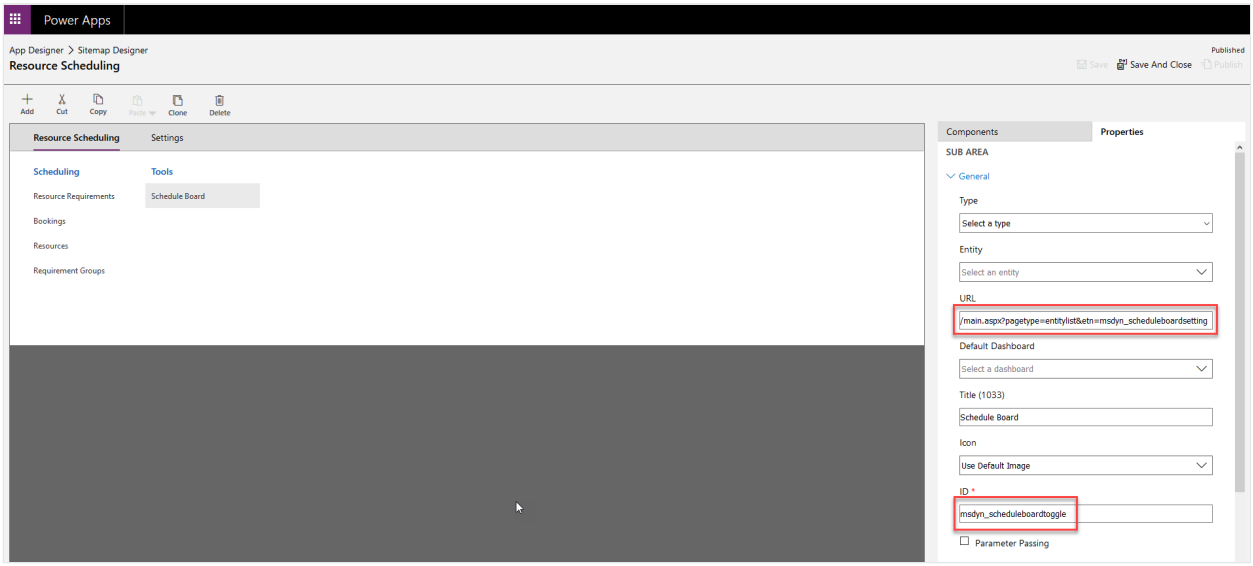
The following snippet is what it looks like before:

```
<SubArea Id="msdyn_ScheduleBoardSubArea" ResourceId="SitemapDesigner.NewSubArea"
VectorIcon="$webresource:msdyn_/Icons/SVG/Calendar.svg"
Url="$webresource:msdyn_/fps/ScheduleBoard/ScheduleBoard.html"
Client="All,Outlook,OutlookLaptopClient,OutlookWorkstationClient,Web"
AvailableOffline="true" PassParams="false" Sku="All,OnPremise,Live,SPLA">
```



The following snippet is what it looks like after:

```
<SubArea Id="msdyn_ScheduleBoardSubArea" ResourceId="SitemapDesigner.NewSubArea"
VectorIcon="$webresource:msdyn_/Icons/SVG/Calendar.svg" Url="/main.aspx?
pagetype=entitylist&amp;etn=msdyn_scheduleboardsetting"
Client="All,Outlook,OutlookLaptopClient,OutlookWorkstationClient,Web"
AvailableOffline="true" PassParams="false" Sku="All,OnPremise,Live,SPLA">
```



URL:

```
/main.aspx?pagetype=entitylist&etn=msdyn_scheduleboardsetting
```

ID:

```
msdyn_scheduleboardtoggle
```

Additional notes

- The schedule board is only supported in Unified Interface web, and not on tablets or phones.
- The booking status colors that appear on the schedule board have lower opacity than the defined booking status colors. This behavior is similar to the Outlook calendar. When a booking is selected on the schedule board, the booking color will appear with normal opacity.

Uninstall the schedule board

To uninstall the new schedule board solution ("Resource Scheduling Controls"), perform the following steps.

1. Go to the **Schedule Board Settings** entity customization form.
2. Remove the new schedule board preview control from the grid.
3. Save and publish the changes.
4. Go to the resource scheduling app, clear the browser's cache, and reload schedule board. The old schedule board will load without the toggle in the top-right side of the screen.
5. Once the solution is uninstalled, the new schedule board won't be available for the environment until you upgrade your Customer Service app to the latest available version.

See also

Schedule a service activity

Service scheduling overview

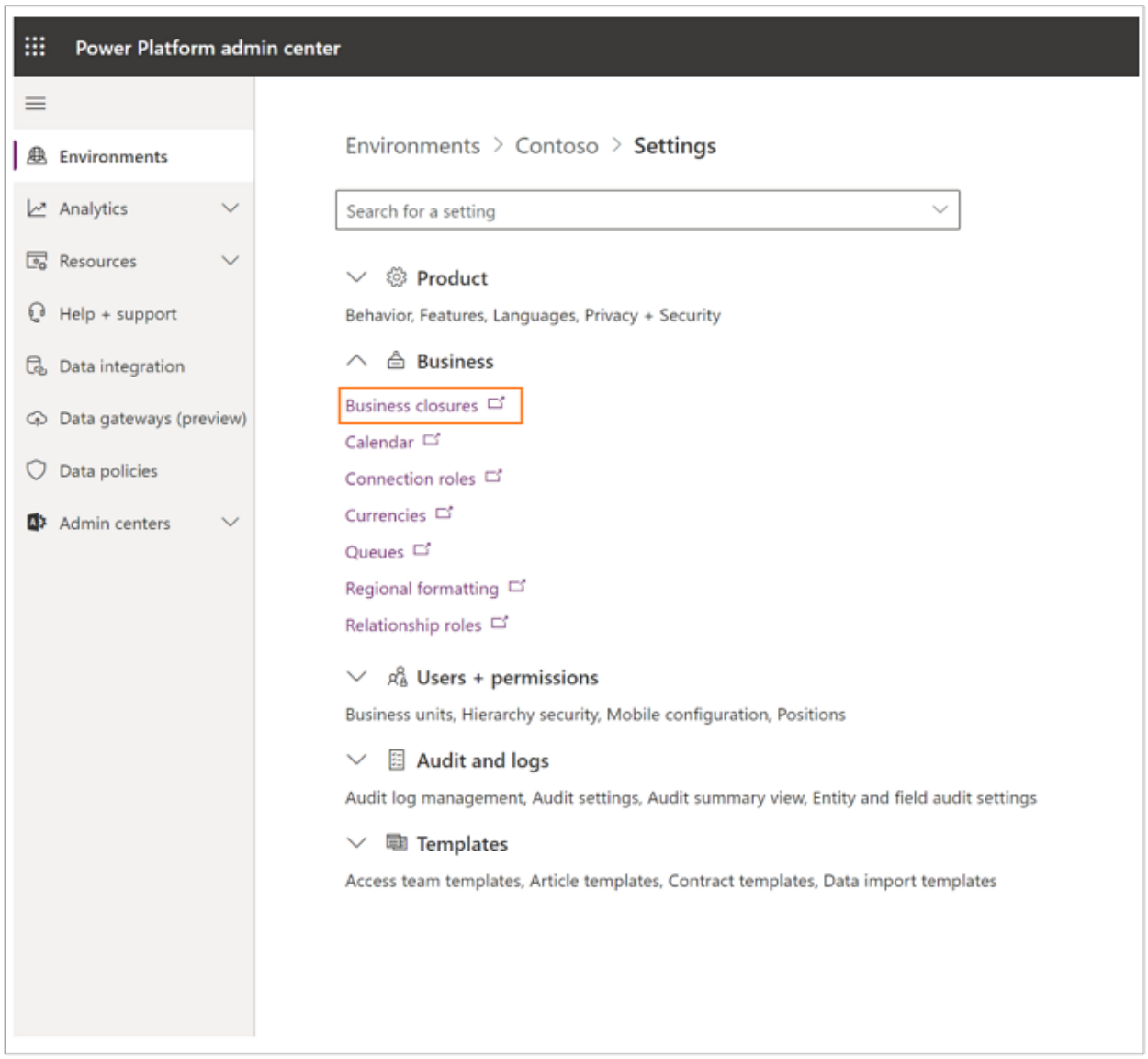
Article • 04/01/2022

Unified Interface-based service scheduling has replaced the legacy service scheduling experience.

The following topics contain information about legacy service scheduling features:

- Create or change a service
- Schedule a service activity
- Add facilities and equipment
- Create resource groups
- Use sites to manage your service locations
- Navigate to the Service Calendar
- Set up a business closure

> **Note**
>
> To set up a business closure, navigate to the **Admin portal**, as shown in the following screen.

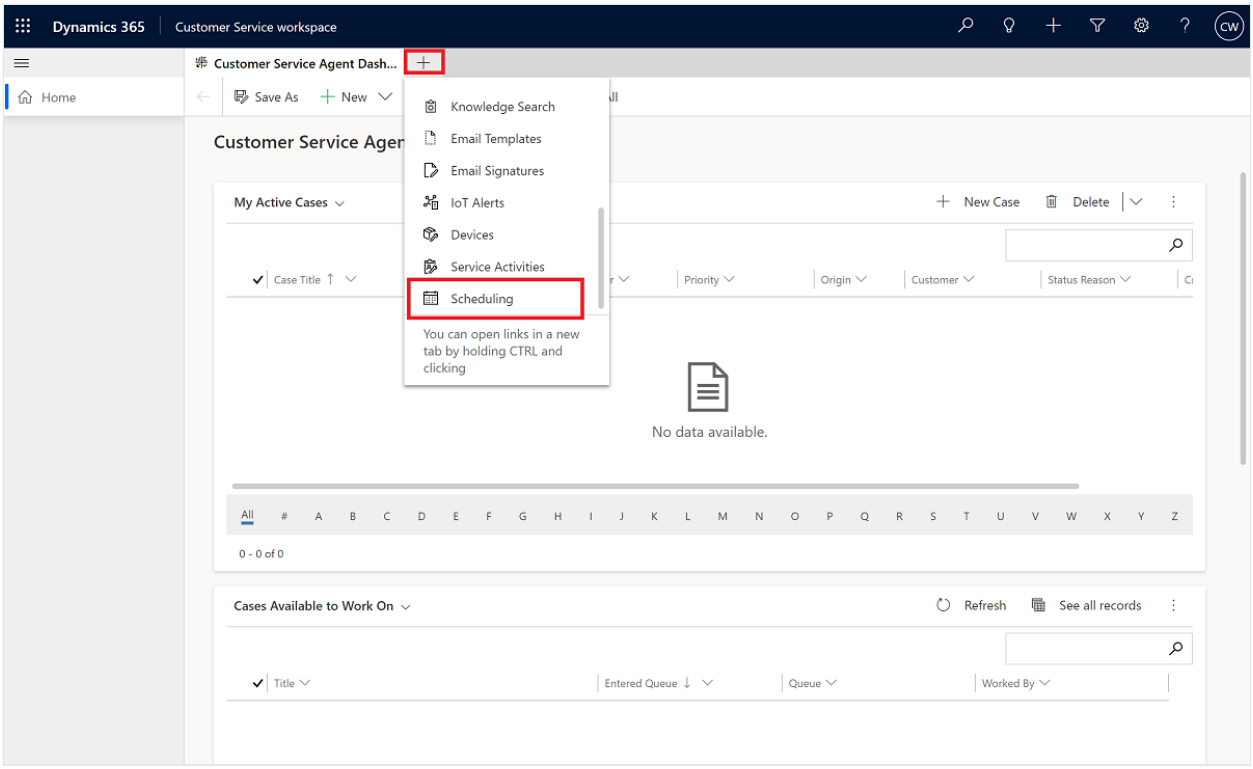


You can also set up service scheduling in Dynamics 365 Customer Engagement (on-premises) 9.1. More information: New features in Dynamics 365 Customer Engagement (on-premises)

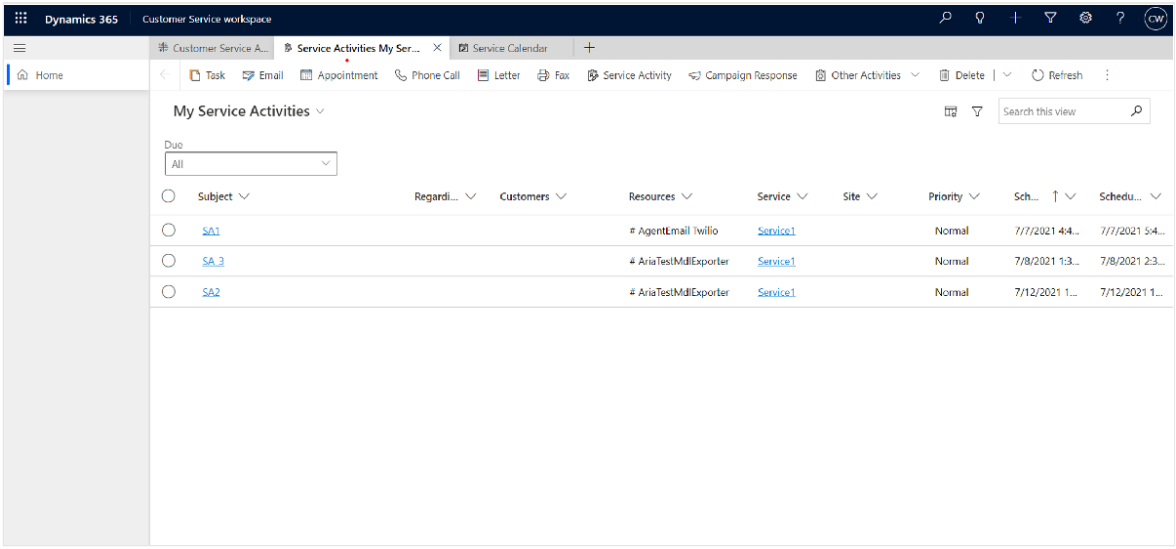
Access service scheduling in Customer Service workspace

Service scheduling is available in the Customer Service workspace app.

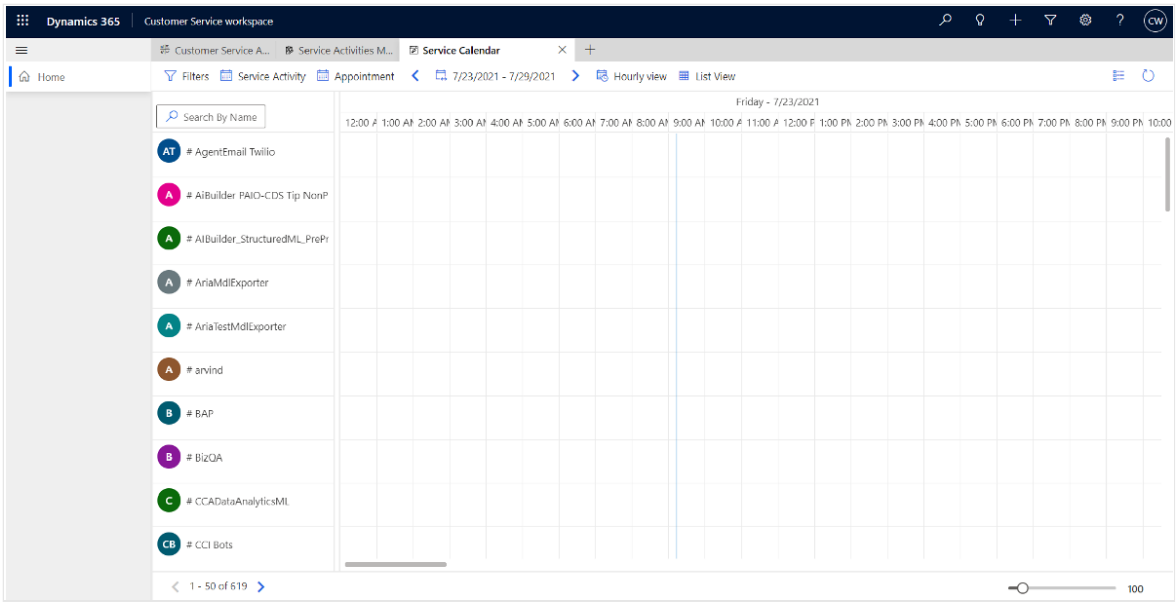
- Select the + icon to expand the menu to view a list of forms, views, and activities, and then select either **Service Activities** or **Scheduling** to open the feature in a new tab.



- Service Activities



- Scheduling



See also

Create or edit a service
Add facilities and equipment
Schedule a service activity
Create resource groups
Use sites to manage your service locations
Navigate the service calendar

Create or edit a service

Article • 04/04/2022

To make scheduling services quick and easy, it's helpful to predefine the specifics of the services you'd provide to customers. By using the service records in Dynamics 365 Customer Service, you can define:

- How long a service activity lasts
- What resources are available for the service activity, like users, facilities, or equipment

A service requires at least one selection rule and one or more resources, resource groups, or teams before the service can be scheduled with a service activity.

Create or change a service

1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.
2. Navigate to the Customer Service admin center or Customer Service Hub app, and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.

   b. In the **Service** section, select **Manage**.

   The **Active Services** view is displayed. You can switch between various system views using the drop-down list.

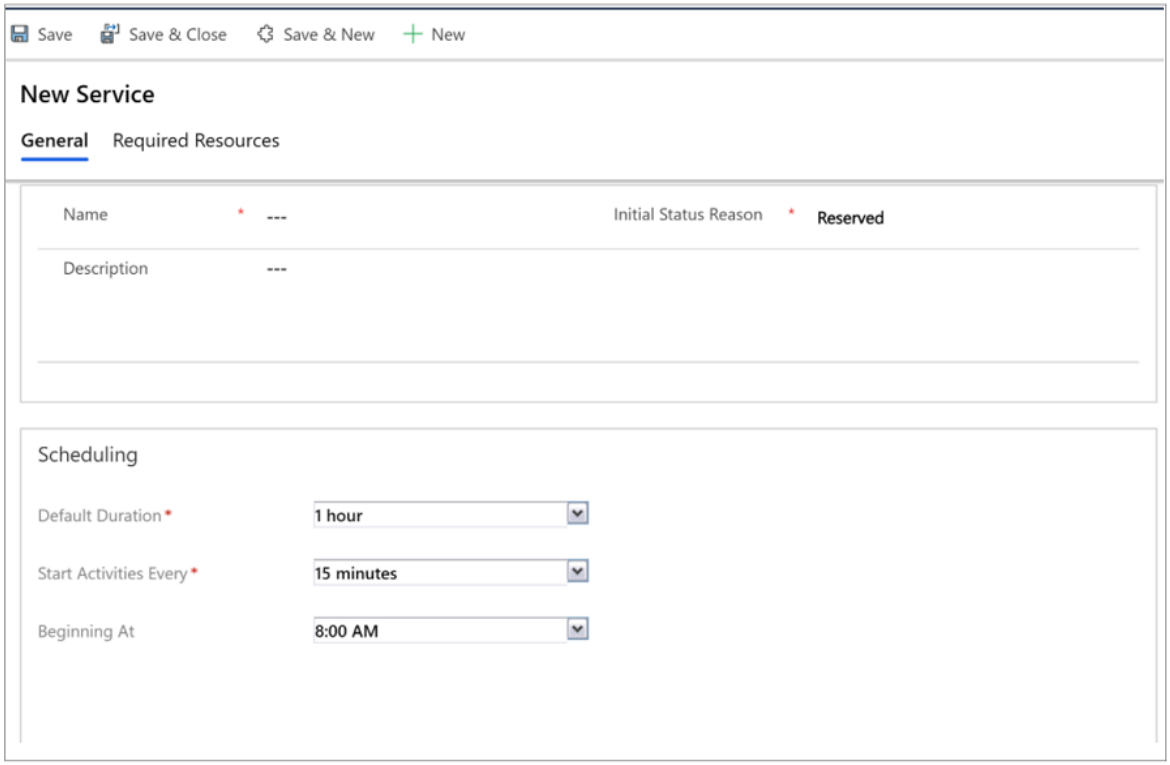
3. Do one of the following:
   - To create a new service, select **New**.
   - To edit a service, open a service from the list.
4. Type or modify information in the text boxes.

a. Under **General**, enter a name and description to reflect the specifics of the service and describes what the service is. Also, specify the initial status of the service activity when it is created. If your organization prefers to approve all service activities before committing them to the schedule, you can select **Requested** or **Tentative**.

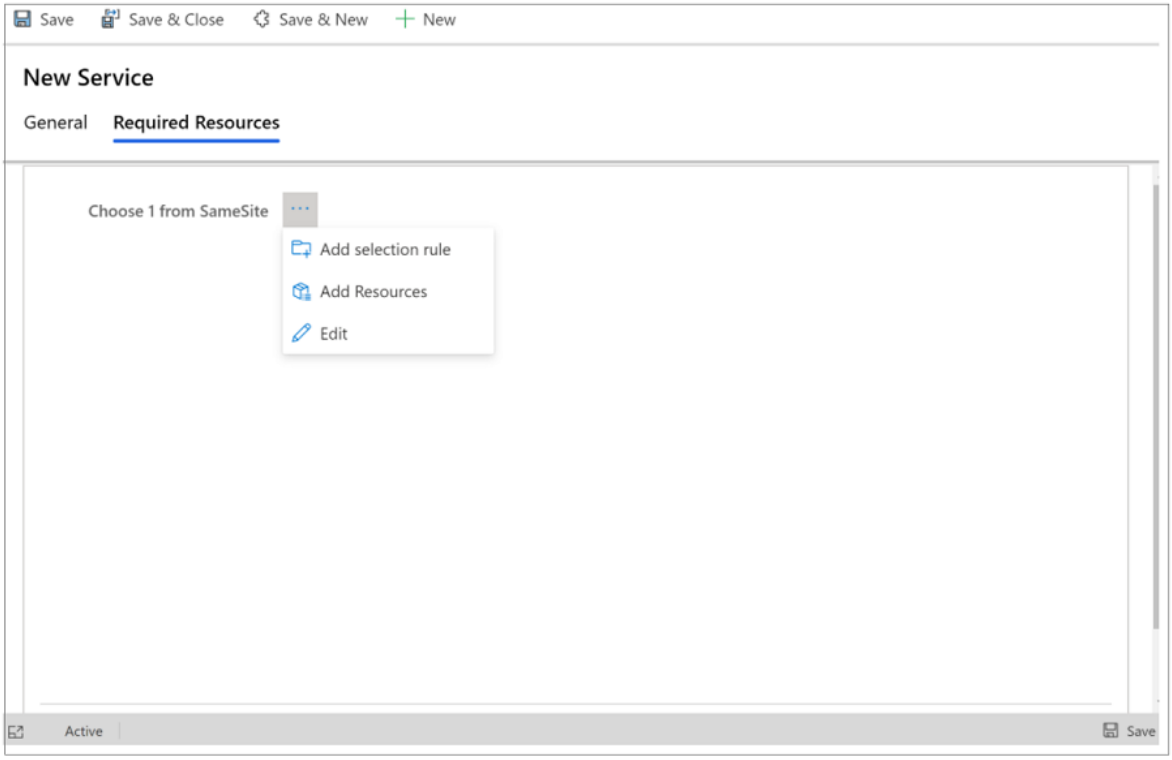
b. Under **Scheduling**, in **Default Duration**, select how long the service lasts. This can be changed when the service activity is created. The maximum duration of an appointment or service activity is 10 days.

c. In **Start Activities Every**, select how often service activities can start. This allows the start times of service activities to be staggered.

d. In **Beginning At**, select the time when the service activities must begin.



5. On the **Required Resources** tab, define a selection rule.



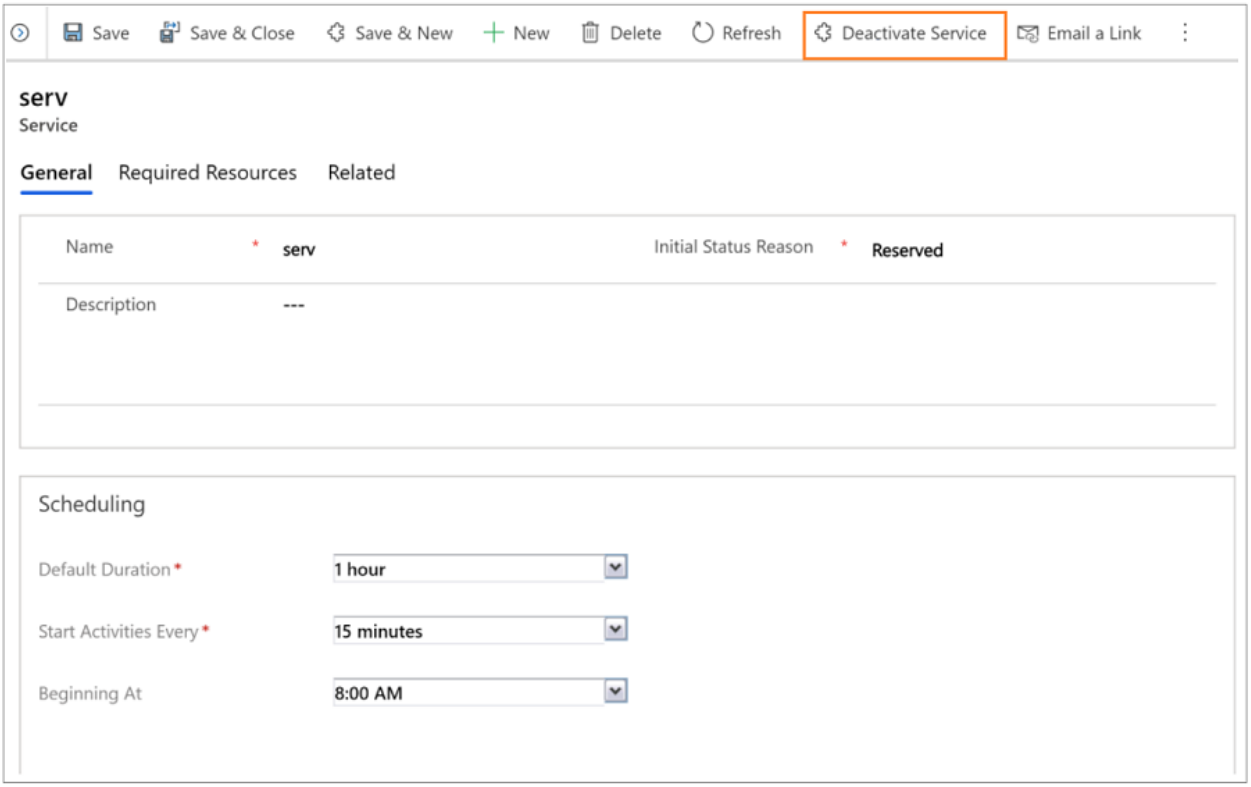
Option	Description
Add a Selection Rule	You can add complexity to a rule by adding a subrule to it.
Add Resources	Add users, facilities, equipment, or teams as resources to a selection rule.
Add Resource Groups	Resource groups are users, facilities, or equipment that can be scheduled interchangeably.

> **Note**
>
> You can save a service without defining a selection rule, but you won't be able to schedule that service.

6. When you're ready to save your data, select **Save**.

Activate or deactivate a service

You can make a service available or unavailable for scheduling by activating or deactivating it.



See also

Unified Interface-based service scheduling overview

Add facilities and equipment

Schedule a service activity

Create resource groups

Use sites to manage your service locations

Navigate the service calendar

Add facilities and equipment resources

Article • 04/04/2022

Introduction

Facilities and equipment are resources you use to perform services for your customers. Facilities can be physical spaces like service bays or conference rooms, and equipment could be tools or other assets. Add these resources to Dynamics 365 Customer Service to ensure optimal services to your customers.

Add facilities or resources

Before you begin, make sure you have the **System Administrator** security role or equivalent permissions in Microsoft Dynamics 365.

1. Navigate to the Customer Service admin center or Customer Service Hub app, and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.

   b. In the **Facilities/Equipment** section, select **Manage**.

      The **Local Facilities/Equipment** view is displayed. You can switch between various system views using the drop-down list.

2. Select **New**.

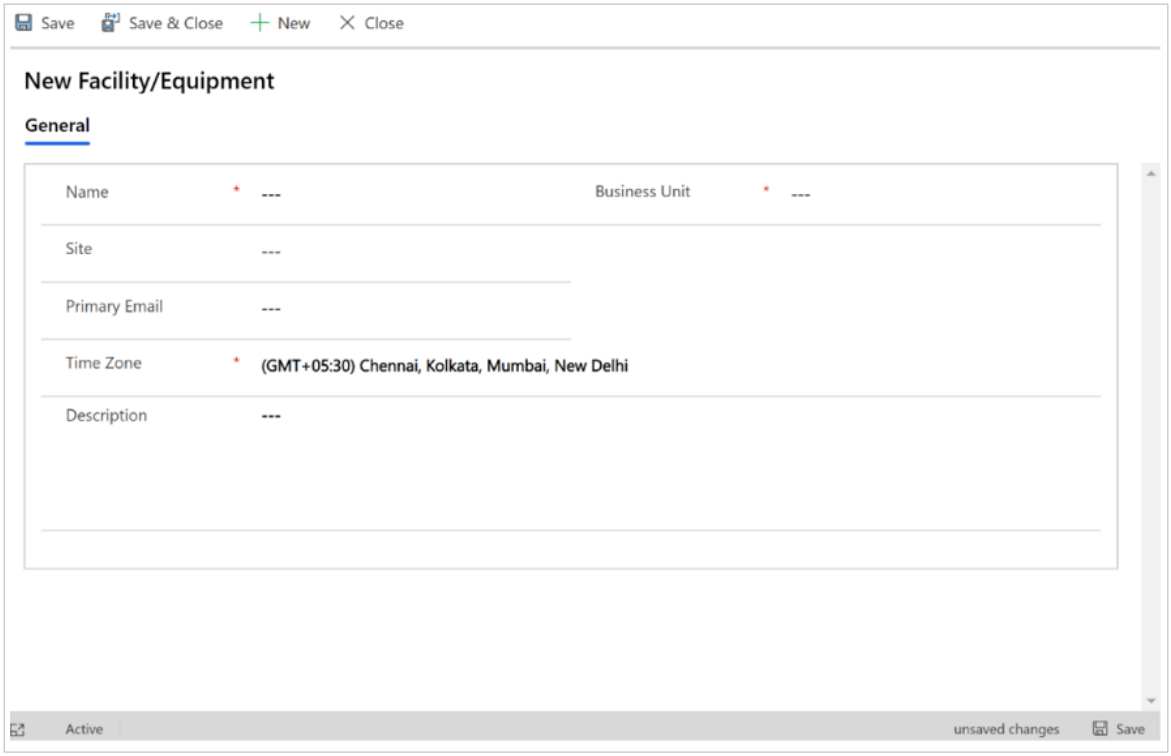
3. Fill in the information as required:

   - **Name**: Enter the name of the facility or equipment you want to add for service scheduling.
   - **Business Unit**: Dynamics 365 Customer Service enters the business unit automatically. To select a different business unit, select the **Lookup** button, and then select the business unit from the list.
   - **Site**. Select the location where the facility or equipment is located.

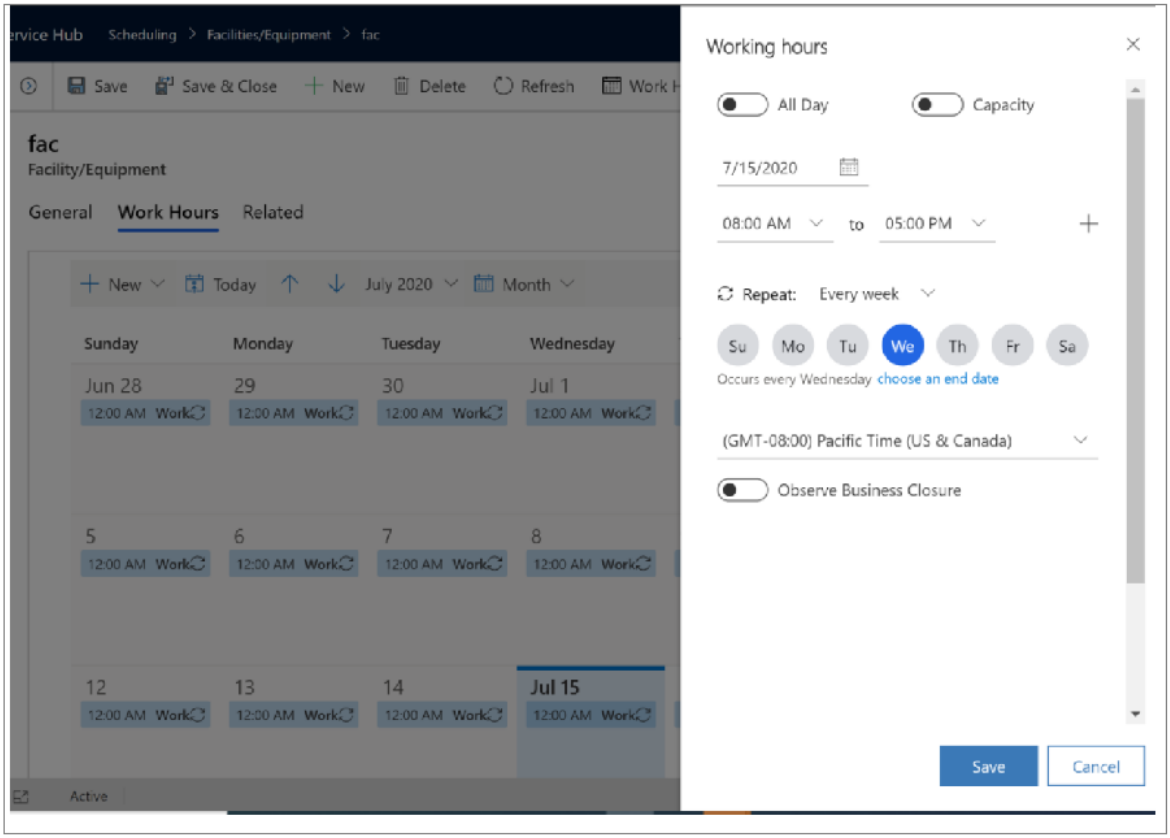
> **Note**
>
> Make sure the site and customer are in the same location. Resources for a given service activity should also be located at the same site.

- **Primary Email**: Enter the email address of the site manager or equipment manager. If there are any updates or cancellations related to the schedule, facilities, or equipment, notifications are sent to this email address.
- **Time Zone**: Select the appropriate time zone to determine availability for the facility or equipment. By default, this is set to the time zone you've selected in the **General** tab of the **Set Personal Options** page. More information: Set personal options
- **Description**: Add details about the facility or equipment, such as the numbers, size, make, or model.

4. When you're finished entering details, select **Save** or **Save & Close**.



5. Set up the work hour calendar.



See also

Unified Interface-based service scheduling overview

Create or edit a service

Schedule a service activity

Create resource groups

Use sites to manage your service locations

Navigate the service calendar

Use the Service Schedule Activity form to schedule a service activity

Article • 11/30/2021

Use this form to search for an available time for a service activity. You can either search for an open time using search criteria that, at a minimum, includes selecting a service, or you can define a more complex set of criteria. You can also create a service activity without checking for conflicts in the scheduled service. The service activity appears as a color block on the service calendar.

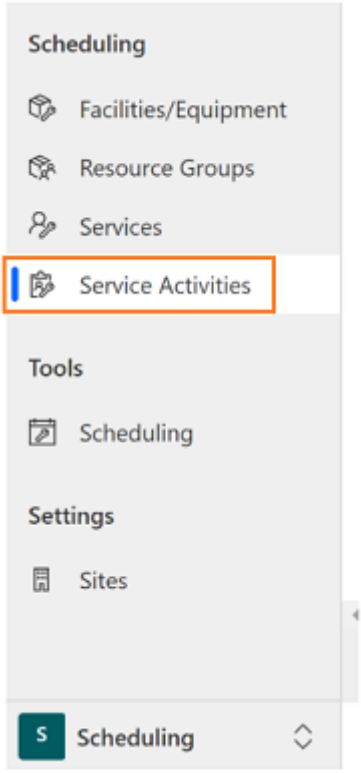
> ⓘ **Note**
>
> You can't create a recurring service activity. Individual activities are recommended.

Create a service activity

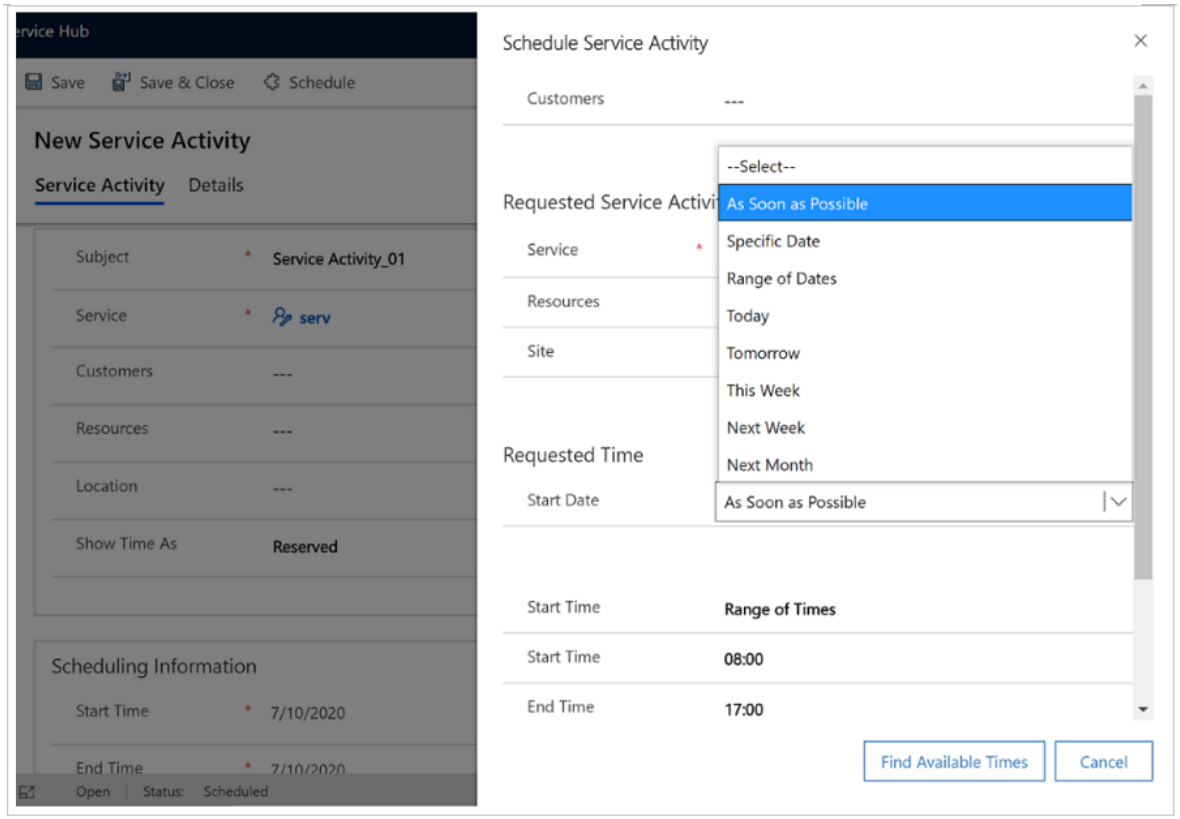
Avoid conflicts while scheduling services by finding the time the resources are available beforehand.

Before beginning to create a service activity, make sure you have the Scheduler role or equivalent permissions.

1. Navigate to **Customer Service Hub** > **Scheduling** tab.
2. Select **Service Activities**.



3. On the **Schedule Service Activity** form, select **Schedule**.



4. Under **Requested Time**, select criteria for the times you want:

- To search for a time on a specific date, in Start Date, select **Specific Date**, and then enter the date you want.

- To search within a range of dates, select **Range of Dates**, and then enter the **On or After** and **On or Before** dates. You can also select specific days of the week.
- You can also search for times based on dates relative to the current date, such as **Today**, **Tomorrow**, **This Week**, **Next Week**, or **Next Month**.
- Similarly, to search within specific range of time, in **Start Time**, select **Specific Time**, **Range of Times**, or **Morning, Evening, Afternoon**.
- Do not clear the **Use Default Duration** check box or change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.

5. Select **Find Available Times**. The next available times are shown.
6. Under **Available Times**, select the time for which you want to schedule the service activity, and then select **Schedule**.

   The Schedule Service Activity form closes, and the application fills in the information from the selected time in the Service Activity form.
7. Type or modify information in other text boxes, as required.
8. When you're ready to save your data, select **Save**.

   The service activity appears as a color block on the Service calendar.

See also

Unified Interface-based service scheduling overview
Create or edit a service
Add facilities and equipment
Create resource groups
Use sites to manage your service locations
Navigate the service calendar

Create resource groups

Article • 04/04/2022

Use resource groups to group users, facilities, and equipment as part of the selection rules for a service.

Create a resource group

Before you begin, make sure you have the Scheduler Manager role or equivalent permissions.

1. Navigate to the Customer Service admin center or Customer Service Hub app, and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.

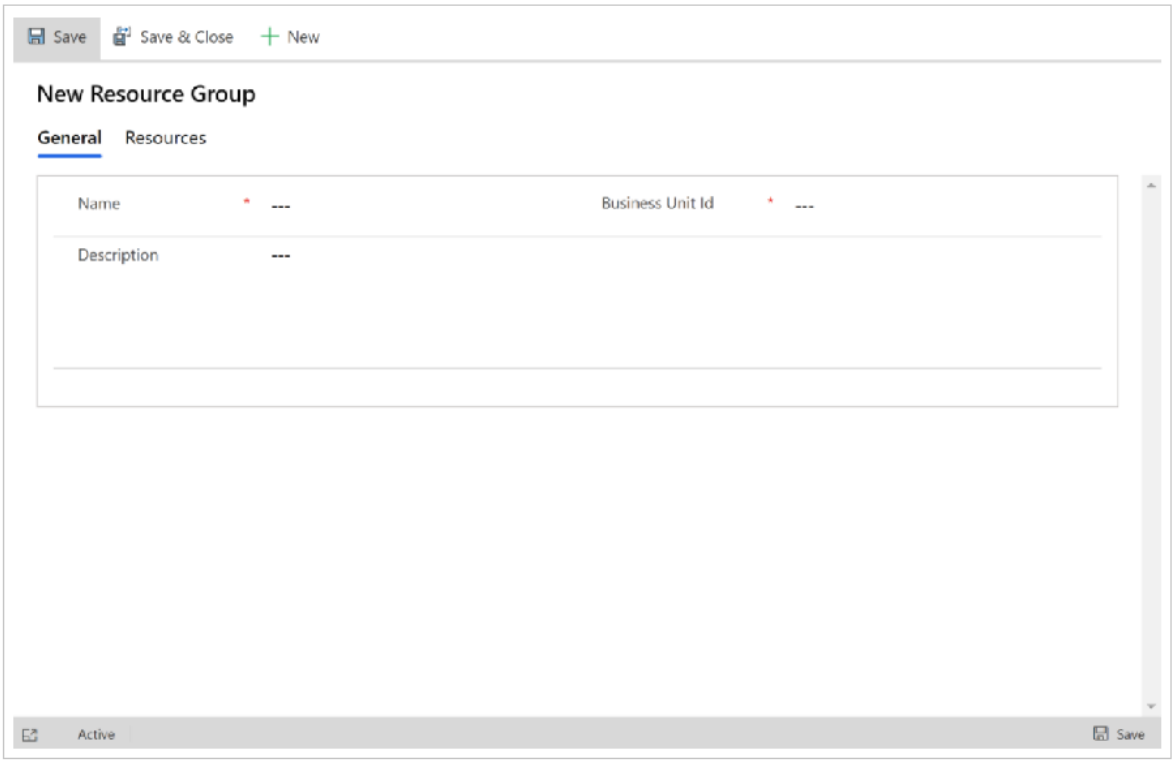
   b. In the **Resource group** section, select **Manage**.

      The **Local Resource Groups** view is displayed. You can switch between various system views using the drop-down list.

2. Select **New**.

3. In the Resource Groups form, enter information in the following fields:

   - **Name**: You must enter a name for the resource group. The application does not check that the name is unique.
   - **Business Unit**: To locate and select a business unit, select the Lookup button.
   - **Description**: You can add a detailed description of this resource group, including the criteria that you used to determine which resources to add to the resource group.

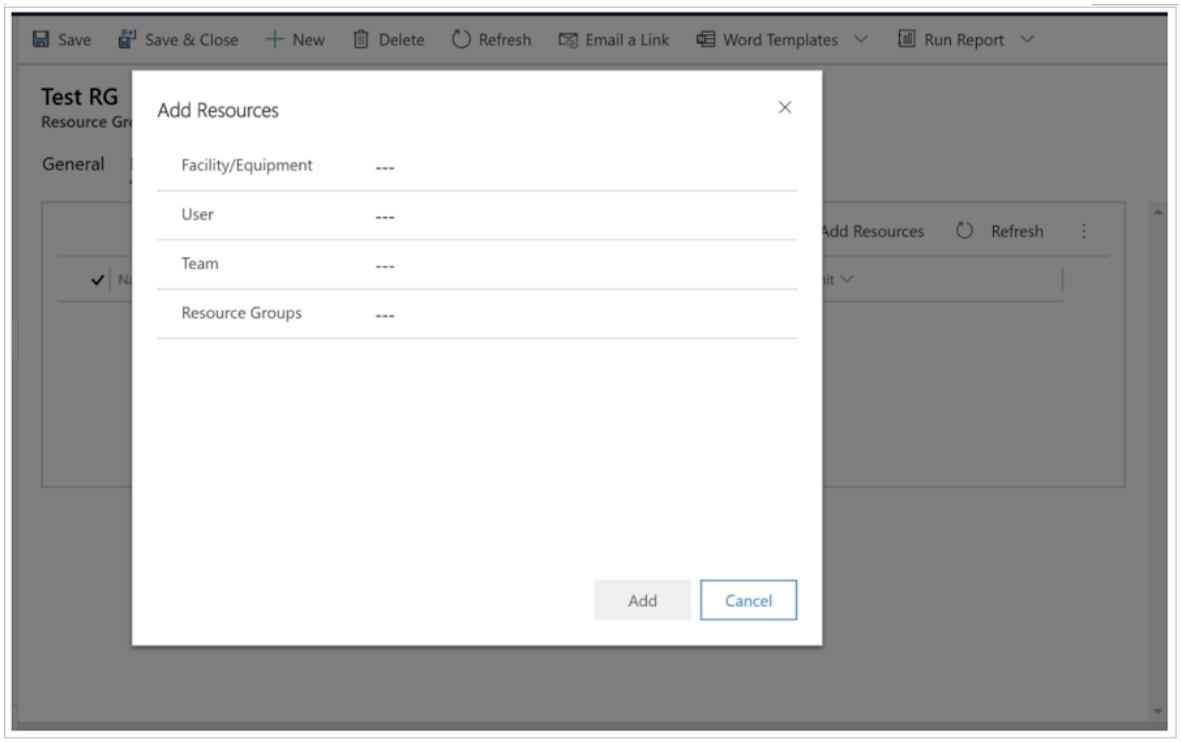


4. Select **Save**. After you save the record, **Resources** appears under **Common**.

5. Select **Resources**, and then on the **Actions** toolbar, select **Add Resources**.

6. In the **Look Up** dialog box, select the users, facilities/equipment, teams, or other resource groups to add to this resource group.

   Adding other resource groups to a resource group is a good way to manage large numbers of resources. For example, you could add the resource groups of "senior technicians" and "junior technicians" to a resource group of "technicians."



7. Select **OK** to add the selected resources to the resource group.

8. Select **Save** or **Save and Close**.

Edit a resource group

1. Navigate to either on the Customer Service Hub or on Customer Service admin center app. Depending on your app, perform the following steps:

   Customer Service admin center

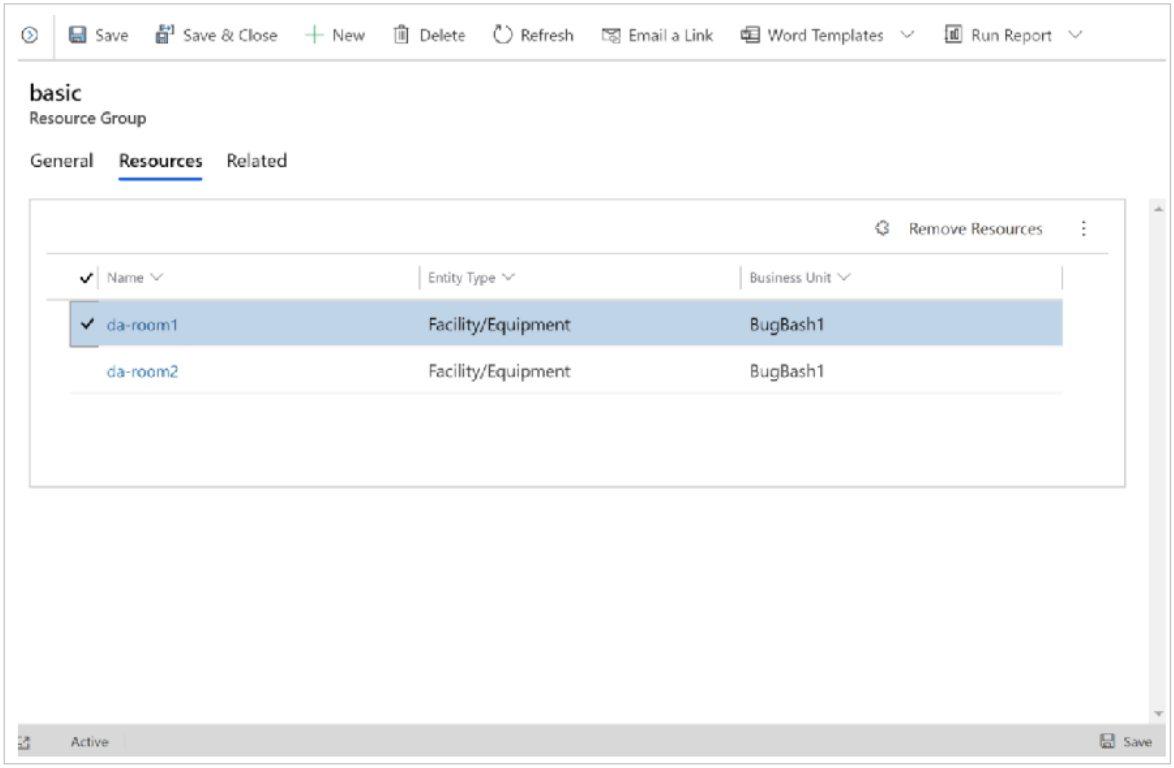
   a. In the site map, select **Service scheduling** in **Operations**.

   b. In the **Resource group** section, select **Manage**.

      The **Local Resource Groups** view is displayed. You can switch between various system views using the drop-down list.

2. Open the resource group you want to change, and then in the **Resource Groups** form, change the information.

3. Select **Save** or **Save and Close**.



See also

Unified Interface-based service scheduling overview

Create or edit a service

Add facilities and equipment

Schedule a service activity

Use sites to manage your service locations

Navigate the service calendar

Use sites to manage your service locations

Article • 03/21/2023

Introduction

Create sites to define the locations where you provide service to your customers. When you're scheduling resources, you can define which resources will work on which site.

You can also create a site in Dynamics 365 Customer Engagement (on-premises) 9.1 also. More information: New features in Dynamics 365 Customer Engagement (on-premises)

Create a site

Before you begin, make sure you have the System Administrator or System Customizer security role or equivalent permissions.

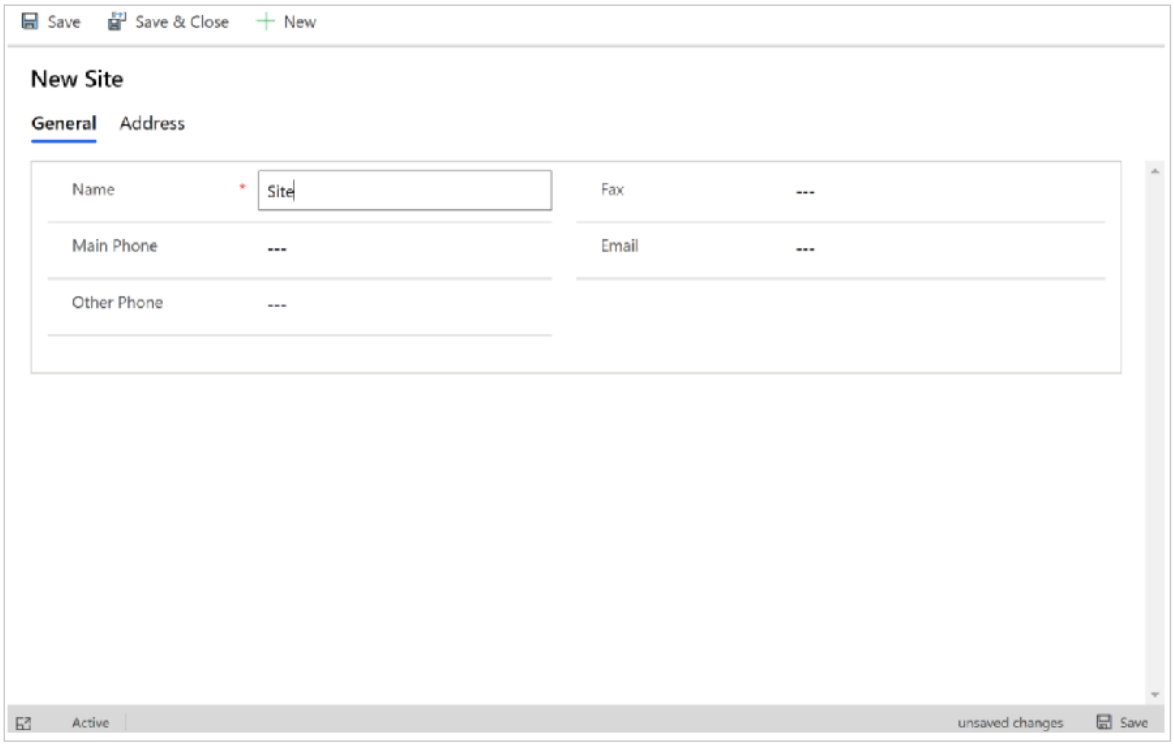
2. Navigate to the Customer Service admin center or Customer Service Hub app, and perform the following steps:

   Customer Service admin center

   a. In the site map, select **Service Scheduling** in **Operations**. The **Service Scheduling** page appears.
   b. In the **Sites** section, select **Manage**.

   The **All Sites** view is displayed. You can switch between various system views using the drop-down list.

3. Select **New**.



4. Enter the details and select **Save**.

See also

Unified Interface-based service scheduling overview

Create or edit a service

Add facilities and equipment

Schedule a service activity

Create resource groups

Navigate the service calendar

Navigate the service calendar

Article • 06/28/2022

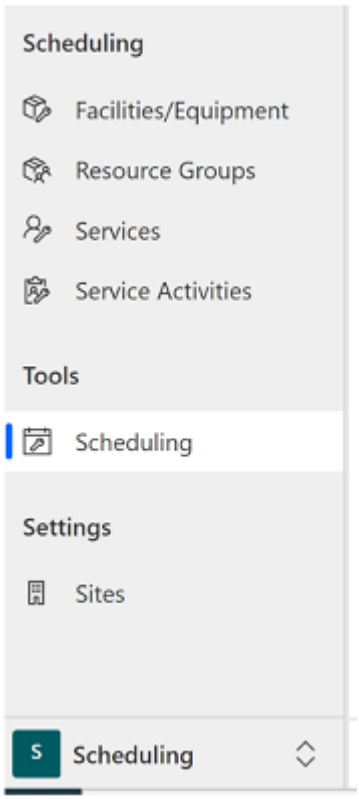
In the Service calendar, you can do the following tasks and activities:

- View your organization's hourly schedule of appointments and service activities.
- View work schedules and service activity schedules for a variety of resources.
- Create new appointments and schedule service activities.
- Change the status of an existing service activity.
- Search for conflicts in the schedule.

You can't customize the service calendar or change the default view with the application. However, you can ask your system administrator to change the colors of the time blocks.

View resources in the service calendar

1. Navigate to **Customer Service Hub** > **Scheduling** tab.

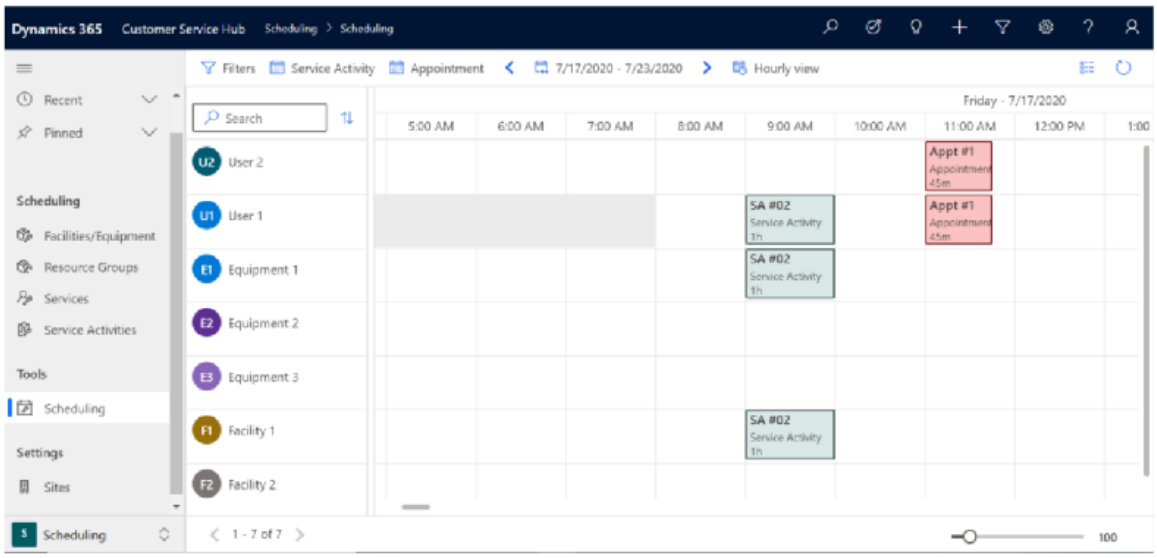


2. Under the Tools section, select the service calendar. A list of resources opens in alphabetical order on the left side of the calendar.

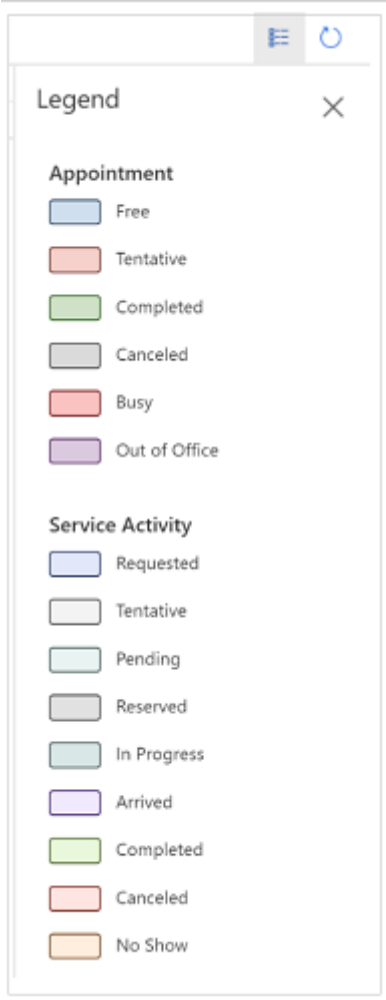
3. To view the resources, appointments, and service activities for anyone in your organization, in the **Type** list, select **Resource**, and then in the **View** list, select the resource view.

4. To find a specific resource, in the **Search** field, enter the first few letters of a name.

5. To change how much of the calendar is available to view, use the **Zoom** scale.



Calendar legend of colors and statuses



View resources in a list view (Preview)

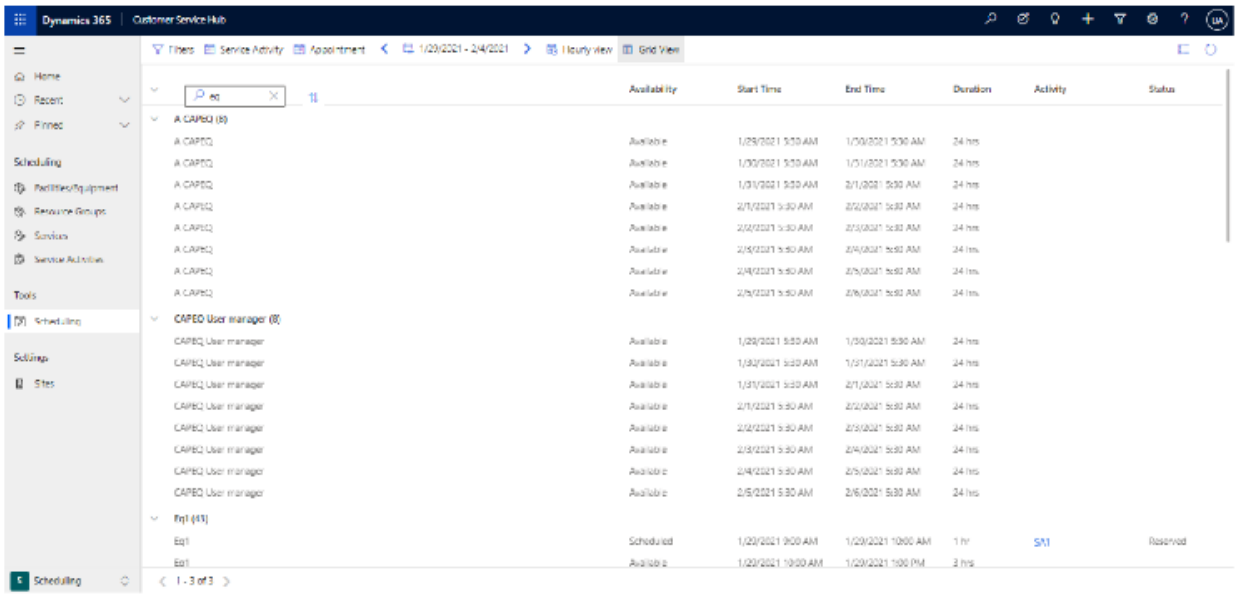
Important

- This topic is pre-release documentation and is subject to change.
- A preview is a feature that is not complete, as it may employ reduced privacy, security, and/or compliance commitments, but is made available before it is officially released for general availability so customers can get early access and provide feedback. Previews are provided "as-is," "with all faults," "as available," and without warranty.
- This preview feature does not come with technical support and Microsoft Dynamics 365 Technical Support won't be able to help you with issues or questions. If Microsoft does elect to provide any type of support, such support is provided "as is," "with all faults," and without warranty, and may be discontinued at any time.
- Previews are not meant for production use, especially to process Personal Data or other data that is subject to heightened compliance requirements,

and any use of "live" or production data is at your sole risk. All previews are subject to separate **Terms and Conditions**.

You can view the number of records in a list by selecting **List view**.

Users who use keyboard shortcuts or a screen reader can access the information in **List view**. Switch to **List view** to see the availabile resources and bookings in a list format.



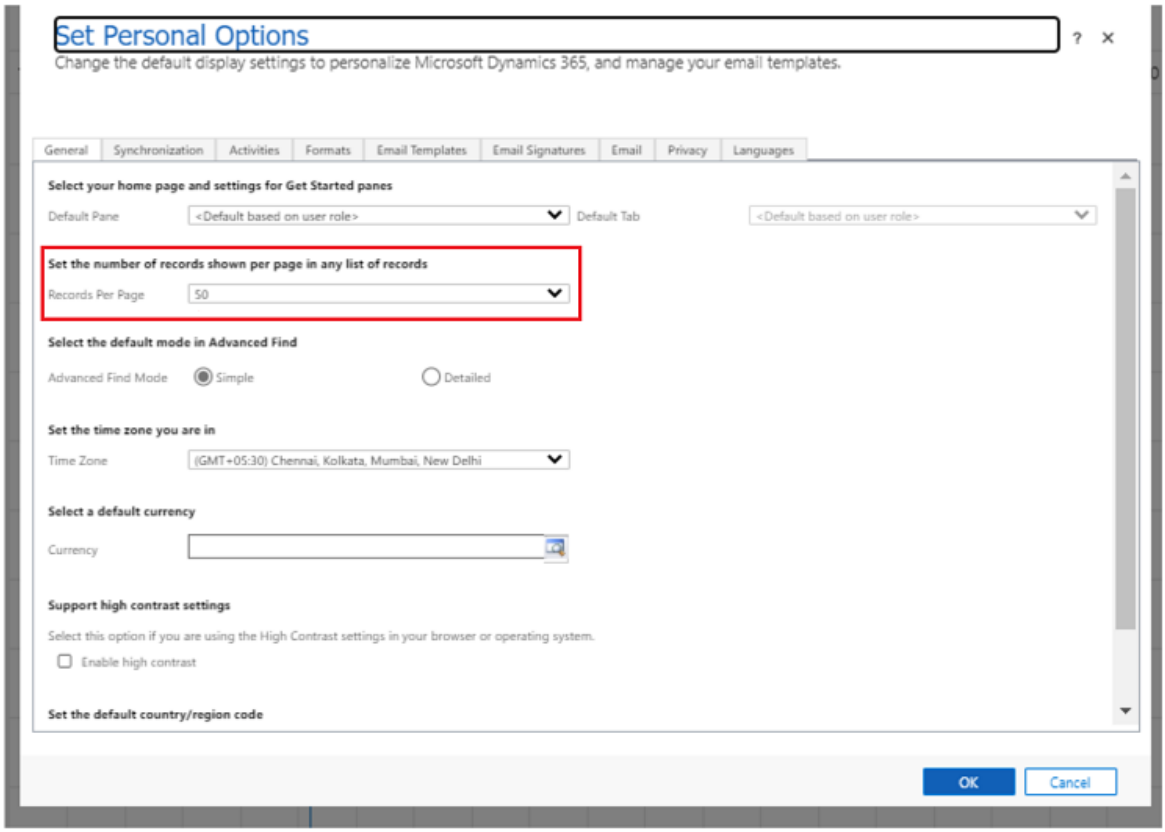
Configure the number of records shown (Preview)

> **ⓘ Important**
>
> This topic is pre-release documentation and is subject to change.

Administrators can configure the number of records that are listed in the resources view as follows:

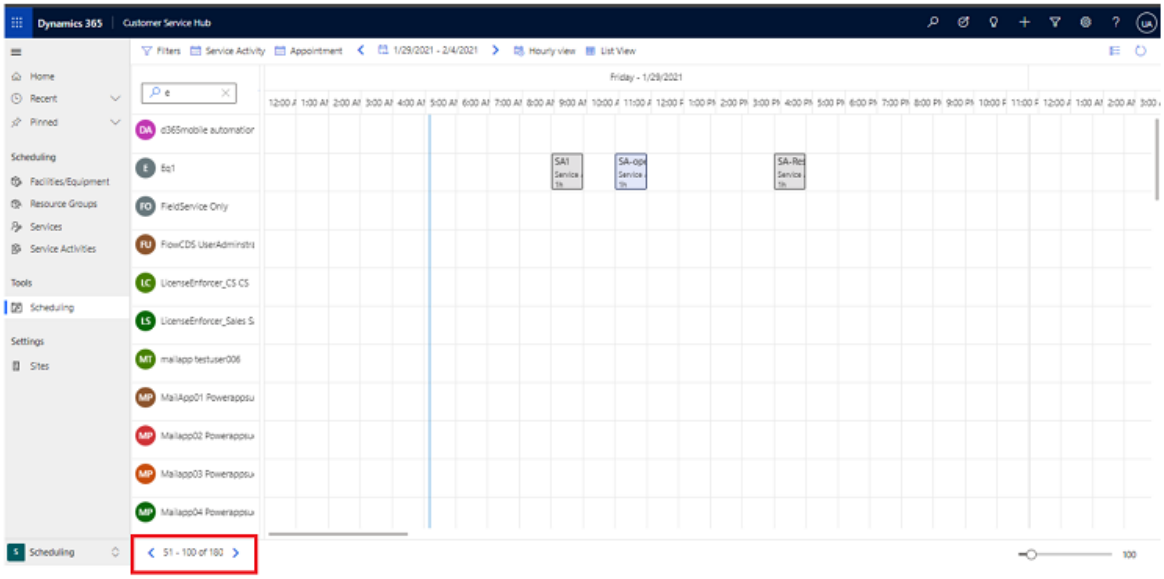
1. In Dynamics 365 Customer Service, select the **Settings** icon in the upper-right corner of the page.

2. Select **Options**, and then on the **General** tab, set **Records per page** to the maximum value you want to show on the page. The value can be set from 50 to 250 records.



3. When you're done, select **OK**.

   The selected number of records is listed for the user.



See also

[Unified Interface-based service scheduling overview]

[Create or edit a service]

[Add facilities and equipment]

Schedule a service activity

Create resource groups

Use sites to manage your service locations

Service Scheduling features for legacy users

Article • 08/09/2022

The legacy Service Scheduling experience is currently being deprecated in alignment with the expected Unified Interface transition date of 12/01/2020. More information: Legacy web client is deprecated. Because of this change, there are currently two approaches you can take to transition to a new scheduling experience. More information: Overview of Service Scheduling migration options.

The following topics contain information about legacy Service Scheduling features:

Set up business closure
Set work hours to define availability
Create or change a service
Schedule a service activity
Add facilities and equipment for Service Scheduling
Create resource groups
Use sites to manage your service locations

Set when your business is closed (Customer Service app)

Article • 08/13/2022

Prevent scheduling resources on holidays and other nonworking days by defining business closures in Dynamics 365 Customer Service. You can set both the days and times that your organization will be closed.

> **ⓘ Important**
>
> With the latest release of Dynamics 365 Customer Service app, the new Service Scheduling is now available in the Customer Service Hub sitemap. We recommend that you set business closures using the new experience. More information: **Set when your business is closed**

1. Make sure you have the Schedule Manager Security role or equivalent permissions to update the business closures.

   ### Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. go to **Settings** > **Service Management**
3. Select **Business Closure**.
4. To create a new business closure, on the command bar, select **New**.

   -OR-

   To edit an existing business closure record, open it from the list.

5. In the **Schedule a Business Closure** dialog box, type or modify information in the text boxes:

   a. In the **Name** box, type a name that describes the purpose of the closure.

      The first 12 characters of the name appear on each day of the closure on the calendar view of the affected resource's **Work Hours**.

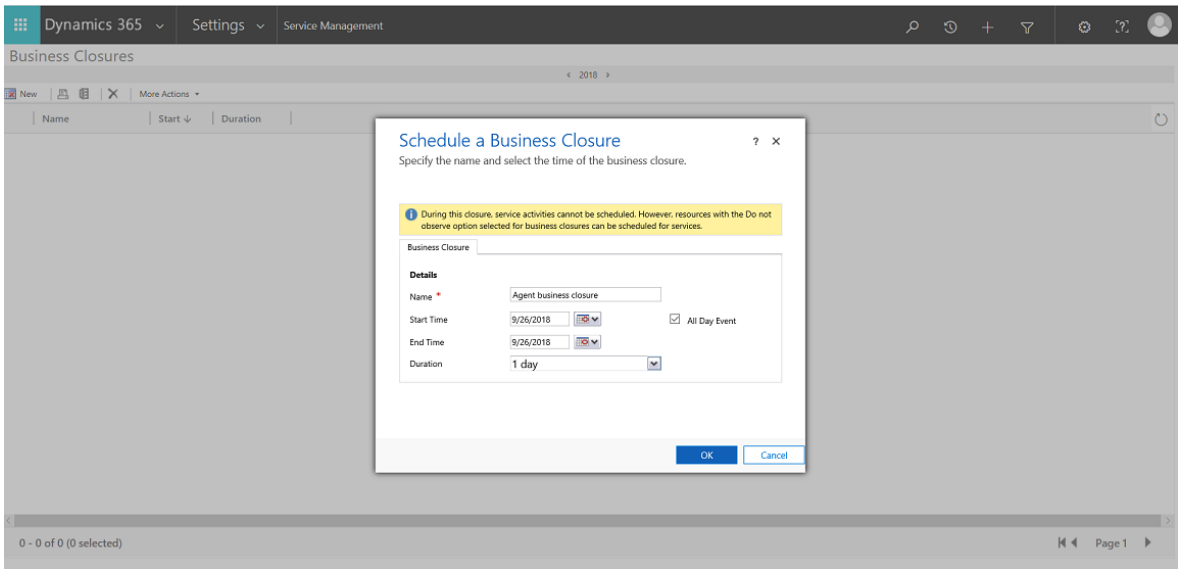
b. In the **Start Time** and **End Time** boxes, enter the start and end date for the closure.

c. If you want to enter duration instead of an end time, select the length of the closure in the **Duration** box. The application automatically calculates the end time for you.

d. If the closure is an all-day event, select the **All Day Event** check box. The application automatically enters the duration of *1 day*.

   If you want to enter a specific time period, clear the **All Day Event** check box. You can then specify the hours during which your organization will be closed.

6. To save this business closure, select **OK**.



See also

Set work hours for a resource
Set up a holiday schedule
Create a customer service schedule and define the work hours

Set work hours to define availability (Customer Service app)

Article • 06/02/2021

You can set up and define the hours a resource is available. By default, the resources are set up for a 7-days-a-week, 24-hour schedule.

> **ⓘ Important**
>
> In the new scheduling experience, you can set work hours for resource types in the **Resources** entity. To know more about setting up work hours, see **Set work hours for the resources**.

Set work hours for a facility or equipment

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

1. Go to **Settings** > **Business Management**.
2. Select **Facilities/Equipment**. In the list, open the resource record you want modify.
3. Select **Work Hours**.
4. On the **Monthly View** tab, double-click a date on the calendar that is the first day you want the new schedule to start, or any date that will be affected by the new schedule.
5. In the **Edit Schedule** dialog box, select one of the following, and then select **OK**.
    - **This date only**

      This option changes only the date selected.

      Skip to step 10.
    - **From <this date> onward**

      This option changes only the schedule going forward.
    - **Entire recurring weekly schedule from start to end**

This option changes this entire schedule from the start to end date.

Selecting this option might change past days, which could affect reports regarding hours worked in the past.

6. In the **Weekly Schedule** dialog box, in the **Set the recurring weekly schedule** section, select one of the following:

   - **Are the same each day**

     The new schedule is the same for every day of the week. After you select this option, select the days of the week that the resource is available.

   - **Vary by day**

     The new schedule is different for one or more days of the week. After you select this option, select the days of the week that the resource is available.

   - **None. Resource is not working**

     The new schedule includes time that the resource is not working.

   In the **Weekly Schedule** dialog box, you can also do any of the following:

   - If the schedule is for more than one day, select the days of the week that this schedule is effective.

   - If the resource does not work during business closures, select the **Observe** option.

   - Under **Date Range**, in the **Starting on** box, you can change the date the schedule starts.

     You cannot change the date the schedule ends. To end a schedule, you must define a new schedule on that date.

7. Choose the work hours link for the schedule you want to modify.

   If work hours have not been set previously, the link is displayed as "Set Work Hours."

8. In the **Set Work Hours and Service Restrictions** dialog box, complete the following fields, and then select **OK**:

   - **Date**

     Select a date from which the work hours for services are to be considered.

- **Start**

  Select the time the work day starts.

- **End**

  Select the time the work day ends.

  To add a break in the work hours, such as a lunch break, select **Add Break**, and then select the start and end time of the break.

9. To define a time when a service will not be available, on the **Service Restrictions** tab, select **New**. In the **Edit a Service Restriction** dialog box, select the service, and select the start and end time between which the service will be unavailable, and then select **OK**.

10. Select **Save and Close** to close the **Weekly Schedule** dialog box.

> **Note**
>
> - You can set the work hours for a single day by double-clicking the day, and then in the **Edit Schedule** dialog box, select **This date only**, then select **OK**. Then, perform step 10 in the procedure.
> - All of the options may not be available to you for selecting how much of the schedule you want to edit. The available options are based on the schedules that are already set up.

See also

Set when your business is closed (Customer Service app)

Create or edit a service (Customer Service app)

Article • 08/13/2022

To make scheduling services quick and easy, it's helpful to predefine the specifics of the services you'd provide to customers. By using the service records in Dynamics 365 Customer Service, you can define:

- How long a service activity would last
- What resources are available for the service activity, like users, facilities, or equipment

A service requires at least one selection rule and one or more resources, resource groups, or teams before the service can be scheduled with a service activity.

> **ⓘ Important**
>
> With the latest release of Dynamics 365 Customer Service app, the new Service Scheduling is now available in the Customer Service Hub sitemap. We recommend that you create services using the new experience. More information: **Create or change a service**

Create or change a service

1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.
2. Go to **Settings** > **Business Management**.
3. Select **Services**.
4. To create a new service, select **New**.

   -OR-

   To edit a service, open a service from the list.
5. Type or modify information in the text boxes.

a. Under **General**, enter a name and description to reflect the specifics of the service and describe what the service is. Also, specify the initial status of the service activity when it is created. If your organization prefers to approve all service activities before committing them to the schedule, you can select **Requested** or **Tentative**.

b. Under **Scheduling**, in **Default Duration**, select how long the service lasts. This can be changed when the service activity is created. The maximum duration of an appointment or service activity is 10 days.

c. In **Start Activities Every**, select how often service activities can start. This allows the start times of service activities to be staggered.

d. In **Beginning At**, select the time when the service activities must begin.

6. In the **Required Resources** area, define a selection rule:

   a. Select a selection rule in the right-hand pane.

      Selection rules appear in the tree beside the **Selection Rule** button .

   b. Select one of the items under **Common Tasks** to define the selection rule by indicating how many resources are required and in what combination.

Add a Selection Rule

You can add complexity to a rule by adding a subrule to it.

Add Resources

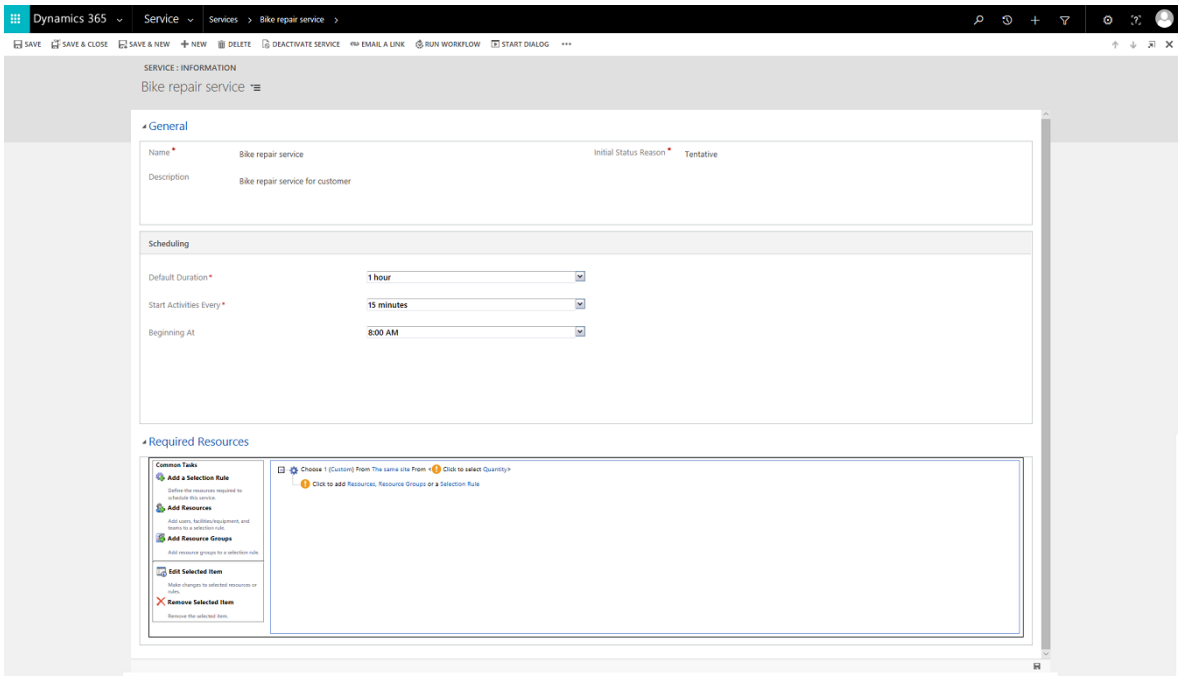
Add users, facilities, equipment, or teams as resources to a selection rule.

Add Resource Groups

Resource groups are users, facilities, or equipment that can be scheduled interchangeably.

> ⓘ **Note**
>
> You can save a service without defining a selection rule, but you won't be able to schedule that service.
> More information: **Create or edit a selection rule**

7. When you're ready to save your data, select **Save**.



Activate or deactivate a service

You can make a service available on unavailable for scheduling by activating or deactivating it. To do this, in the list of service records, select a service, then select **More Actions** > **Activate** or **More actions** > **Deactivate**.

See also

Set the capacity required for a service or resource
Create or edit a selection rule
Create or change a resource group
Set work hours for a resource

Schedule a service activity (Customer Service app)

Article • 06/02/2021

Use this form to search for an available time for a service activity. You can either search for an open time using search criteria that, at a minimum, includes selecting a service, or you can define a more complex set of criteria. You can also create a service activity without checking for conflicts in the scheduled service. The service activity appears as a color block on the service calendar

> **Note**
>
> With the latest release of Dynamics 365 Customer Service app, the new Service Scheduling is now available in the Customer Service Hub sitemap. We recommend that you create service activities using the new experience. More information: **Schedule a service activity**

You can't create a recurring service activity and it is recommended to create individual service activities as per requirement.

> **Important**
>
> While creating a service activity, when you select resources manually and the system is unable to find a correct selection rule for the selected resources, you see the following error:
>
> Can't determine the correct selection rule for one or more selected resources.
>
> In that case, you can either reselect the resources from the selection rule or ignore the error and select Save. If you choose to save, 1 unit of capacity is depleted for the unresolved resources.

Use the following links to learn more about service scheduling using service activity:

Navigate the service calendar
Find the next available time before creating a service activity
Force an activity into a time slot
Create a selection rule to determine how resources are selected for service activities (Customer Service app)

Add facilities and equipment for service scheduling (Customer Service app)

Article • 03/14/2022

Facilities and equipment are resources you'd use to perform services for your customers. Facilities can be physical spaces like service bays or conference rooms and equipment could be tools or other assets. Add these resources to Dynamics 365 Customer Service to ensure optimal services to your customers.

> **Important**
>
> With the latest version of Dynamics 365 Customer Service app release, the new Service Scheduling is now available in the Customer Service Hub sitemap. We recommend that you create facilities and equipments using the new experience. More information: **Add facilities and equipments to schedule service**

Add a facility or equipment

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics 365.

   ### Check your security role

   - Follow the steps in View your user profile.
   - Don't have the correct permissions? Contact your system administrator.

2. go to **Settings** > **Service Management**

   -OR-

   Go to **Settings** > **Business Management**.

3. Select **Facilities/Equipment**.

4. On the command bar, select **New**.

5. Fill in the information as required:

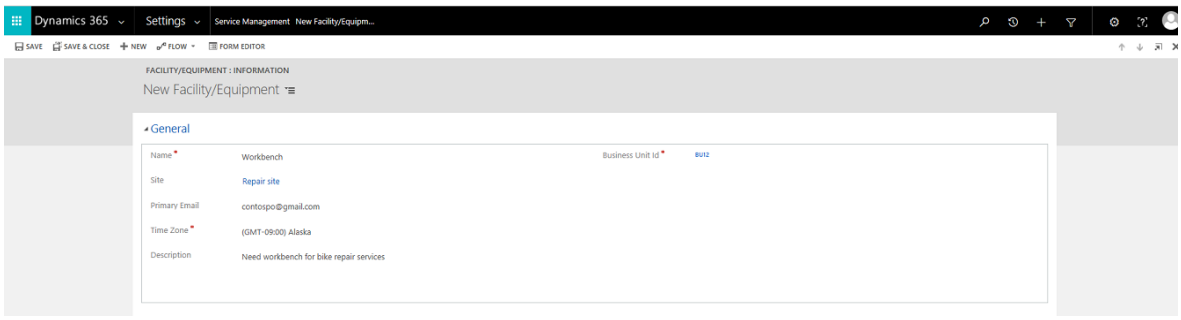
   - **Name**. Enter the name of the facility or equipment you want to add for service scheduling.

- **Business Unit**. Dynamics 365 Customer Service enters the business unit automatically. To select a different business unit, select the **Lookup** button and then select from the list.
- **Site**. Select the location where the facility or equipment is located.

  > **Tip**
  >
  > Make sure the site and the customer are in the same location. Resources for a given service activity should also be located at the same site.

- **Primary Email**. Enter the email address of the site manager or equipment manager. If there are any updates or cancellations related to the schedule, facilities, or equipment, notifications are sent to this email address.
- **Time Zone**. Select the appropriate time zone to determine availability for the facility or equipment. By default, this is set to the time zone you've selected in the **General** tab of the **Set Personal Options** dialog box. More information: Set personal options
- **Description**. Add details about the facility or equipment, such as the numbers, size, make, or model.

6. When you're done, select **Save** or **Save and Close**.



See also

Basics of service and service scheduling

Create or change a resource group (Customer Service app)

Article • 08/13/2022

Use resource groups to group users, facilities, and equipment as part of the selection rules for a service.

> **Note**
>
> With the latest release of Service Scheduling, Resource Groups are referred as Resource Categories. More information: **Create and manage resource categories**

1. Go to **Settings** > **Business Management**.
2. Select **Resource Groups**.
3. On the Actions toolbar, select **New**.
4. In the **Resource Groups** form, enter information in the following fields:
    - **Name**

      You must enter a name for the resource group. The application does not check that the name is unique.
    - **Business Unit**

      To locate and select a business unit, select the **Lookup** button .
    - **Description**

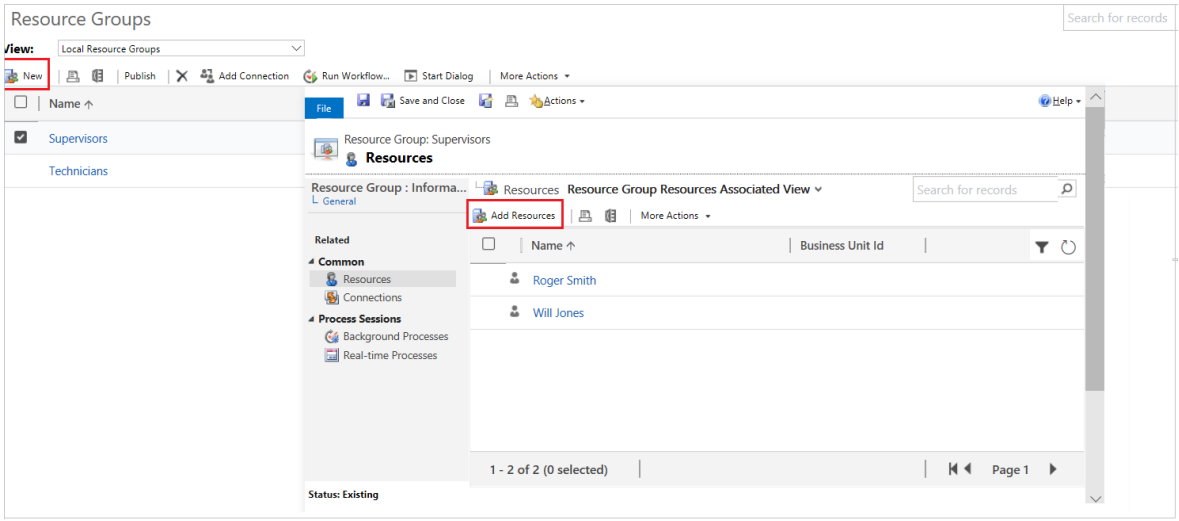
      You can add a detailed description of this resource group, including the criteria that you used to determine which resources to add to the resource group.
5. Select **Save**.

   After you save the record, **Resources** appears under **Common**.
6. Select **Resources**, and then on the Actions toolbar, select **Add Resources**.
7. In the **Look Up** dialog box, select the users, facilities/equipment, teams, or other resource groups to add to this resource group.

Adding other resource groups to a resource group is a good way to manage large numbers of resources. For example, you could add the resource groups of "senior technicians" and "junior technicians" to a resource group of "technicians."

8. Select **OK** to add the selected resources to the resource group.

9. Select **Save** or **Save and Close**.



Edit a resource group

1. Go to **Settings** > **Business Management**.

2. Select **Resource Groups**.

3. Open the resource group you want to change.

4. In the **Resource Groups** form, change the information.

5. Select **Save** or **Save and Close**.

> **Note**
>
> Resource groups are published automatically when you save and close the form. If the new resource group doesn't appear in the list of available resource groups for a service, or if changes are not appearing, you can manually publish the change by selecting **Publish** on the **Resource Groups** page.
>
> To remove a resource, select the resource you want to remove from the resource group. On the Actions toolbar, select **More Actions**, and then select **Remove Resources**.

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Use sites to manage your service locations (Customer Service app)

Article • 08/13/2022

Create sites to define the locations where you provide service to your customers. When you're scheduling resources, you can define which resources will work on which site.

> **ⓘ Important**
>
> With the latest release of Dynamics 365 Customer Service app, the new Service Scheduling is now available in the Customer Service Hub sitemap. We recommend that you create using the new experience. More information: **Create and manage organizational units**

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.
2. Go to **Settings** > **Business Management**.
3. Select **Sites**.
4. On the Actions toolbar, select **New**.
5. Fill in your information. Use the handy tooltips as a guide.
6. Select **Save**.
7. To add resources, under Common, select **Resources**, and then select **Add Resources**.
8. In the **Look Up Records** dialog box, in the **Look For** drop-down list, you can add facilities/equipment or users as resources.
9. From the list of records, double-click a resource, and select **Add**.
10. Select **Save and Close**.

See also

Create or edit a service (Customer Service app)

Schedule a service activity (Customer Service app)

Service scheduling FAQ

Article • 06/02/2021

Read this topic to find answers to some common questions regarding service scheduling, its legacy experience and new experience, setup, and other key concepts.

What licenses do I need to enable service scheduling for my org?

The new scheduling experience is available to you if you have one of the following licenses:

- D365_ENTERPRISE_P1 – Customer Engagement
- D365_ENTEPRISE_CS – Customer Service
- D365_ENTERPRISE_CM – Case Management

Is the new scheduling experience automatically available with the next Dynamics 365 Customer Service upgrade?

Scheduling in the Customer Service Hub is a customer-driven update. You need to avail and enable the service scheduling package, which also includes the Universal Resource Scheduling (URS) functionality.

More information: Set up the scheduling experience

Is manual selection of resources supported in a service activity in the new scheduling experience?

While creating a service activity, manual selection of resources is not supported in the new scheduling experience in Customer Service Hub.

How do I install Core Service Scheduling from the Power Platform admin center?

For steps on how to install Core Service Scheduling from the Power Platform admin center, see Install Service Scheduling from Power Platform.

See also

Service Scheduling Guide

Search resource availability and create bookings for requirement groups

Article • 10/07/2022

Use the Search Resource Availability for Requirement Group API and the Create Requirement Group Bookings API to book the resources that meet the needs you identify in your requirement groups.

- The Search Resource Availability for Requirement Group API returns available time slots for resources when you search by using requirement groups.
- The Create Requirement Group Bookings API uses the available time slots for resources to generate booking records for your requirement groups.

You pass the details of a requirement group in your API calls and retrieve a list of available resources and their open time slots. This is helpful for self-scheduling scenarios, where a user wants to view the availability of resources, or for portal scheduling scenarios where a customer wants to view resource availability from a website or app.

Prerequisites

- Dynamics 365 version 9.0 or above with Universal Resource Scheduling version 3.12.x.x

Search Resource Availability for Requirement Group API

Use the following input and output parameters for the Search Resource Availability for Requirement Group (**msdyn_SearchResourceAvailabilityForRequirementGroup**) API.

Parameters

Name	Type	Required	Description
Version	String	Yes	The version number of the API. The version number identifies the version of the API that should be invoked. The version number is a semantic version number of the format major.minor.patch. The request does not have to contain the complete version number.
RequirementGroup		Yes	An entity reference to the requirement group entity.
RequirementSpecification	Integer	No	If left null, respects the targeting requirement group duration by default.
Settings	`Entity<InputSettings>`	No	Sets the settings for the request.

Inputsettings

Name	Type	Required	Description
ConsiderSlotsWithLessThanRequiredDuration	Boolean	No	Specifies if a time slot with less than the required remaining duration should be considered when computing potential time slots. It is false by default.
ConsiderSlotsWithOverlappingBooking	Boolean	No	Specifies if time slots with overlapping bookings should be considered when computing potential time slots. It is false by default.
ConsiderSlotsWithProposedBooking	Boolean	No	Specifies if time slots with proposed bookings should be considered when computing potential time slots. It is false by default.
MaxResourceTravelRadius	Distance	No	Specifies the maximum travel radius for resources when computing available time slots.
SortOrder	Integer	No	Specifies the requirement group order for the response.
PageSize	Integer	No	Numbers of item returned in a page. It is 20 by default.
PagingCookie	String	No	Paging cookie retrieved from previous searching result.

Name	Type	Required	Description
OrganizationUnits	List<Guid>	No	A collection of organization unit IDs. A qualified resource must be a member of one of the specified organization units.
MustChooseFromResources	List<Guid>	No	Evaluate and select results from resources in this list.
RequiredResources	List<Guid>	No	Evaluate all resources, filter the results based on this list. In general, use MustChooseFromResources instead for improved performance.
IgnoreTimeSlots	Boolean	No	Specifies if the returned time slots should be ignored. When true list of time slots returned will be empty. It is false by default.
ConsiderAppointments	Boolean	Set this to True for search resource availability API to respect existing Dataverse appointments as bookings on the resource, provided the organization and resource level settings have been set. Appointments with Busy or Completed statuses will be considered as unavailable for scheduling operations.	

Output

Returns	Name(Type)	Description
TimeSlots (List<OutputTimeSlot>)	StartTime (DateTime)	The start time.
	EndTime (DateTime)	The end time.
	ArrivalTime (DateTime)	The arrival time.
	Travel(OutputTimeSlotTravel) OutputTimeSlotTravel • Distance (Double) • TravelTime (Double) • DistanceFromStartLocation (Double) • TravelTimeToEndLocation (Double)	The time slot travel information. Will only be present if the resource requirement contains values for latitude and longitude.
	Effort (Double)	The effort/capacity.
	IsDuplicate (Boolean)	A Boolean value indicating if the time slot is a duplicate.

Returns	Name(Type)	Description
	Resource(OutputResource) OutputResource • Resource (BookableResource) • TotalAvailableTime (Double)	The Resource entity as explained below.

	Location(OutputTimeSlotLocation)
	
	OutputTimeSlotLocation:
	
	• WorkLocation (Enum):
	  ◦ Onsite (0)
	  ◦ Facility (1)
	  ◦ Location agnostic (2)
	
	• LocationSourceSlot (Enum):
	  ◦ Common (1)
	  ◦ Custom GPS entity (2)
	  ◦ Mobile audit (3)
		The entity contains details about the location of a time slot. For more details, see TimeSlotLocation below.

	TimeGroup(TimeSlotTimeGroup) OutputTimeSlotTimeGroup: • TimeGroupId (Guid) • TimeGroupDetail (EntityReference) • TimeGroupDetailStartTime (DateTime) • TimeGroupDetailEndTime (DateTime)	The entity contains details about a time group. For more details, see TimeSlotTimeGroup below.
	AvailableIntervals (`List<<Guide>OutputTimeSlot>`)	A collection of available intervals.
Resources (List<OutputResource>)	Resource (EntityReference)	An entity reference to the bookable resource.
	BusinessUnit (EntityReference)	An entity reference to the bookable resource group.
	OrganizationalUnit (EntityReference)	An entity reference to the organizational unit.
	ResourceType (Int)	The resource type. See the resourcetype attribute on the BookableResource entity for possible values.
	PoolId (Guid)	The Id of the pool that the resource is a member of for the duration of the time slot.
	CrewId (Guid)	The Id of the crew that the resource is a member of for the duration of the time slot.
	Email (String)	The resource's email address.
	Phone (String)	The resource's phone number.
	ImagePath (String)	The path to the resource's image.
Requirements (List<OutputRequirements>)	Requirement (EntityReference)	An entity reference to the Resource Requirement record.
	ConstraintBag (String)	Requirement constraint in ufx bag(internal)
	Resources (`List<<EntityReference>EntityReference>`)	Entity reference list of resource that is available to the requirements.
ProposalResourceAssignmentSets (List<OutputProposalResourceAssignmentSet>)	IntervalStart (DateTime)	Start time for each proposal resource assignment set.

Returns	Name(Type)	Description
	ProposalResourceAssignments (List<OutputProposalResourceAssignments> OutputProposalResourceAssignments: • RequirementId (Guid) • ResourceId (Guid)	List of Resources assigned to Requirement.
PagingInfos (OutputPagingInfo)	MoreResults (Boolean)	If there are more results or not.
	PagingCookie (String)	Paging cookie that can be used in the future search.

Example

HTTP

```
{
  "RequestName": "msdyn_SearchResourceAvailabilityForRequirementGroup",
  "Parameters": [
    {
      "Key": "Version",
      "Value": "1.0.0"
    },
    {
      "Key": "RequirementGroup",
      "Value": {
        "Id": "6927721a-0137-42be-8092-26995625a9d9",
        "LogicalName": "msdyn_requirementgroup",
        "Name": null,
        "KeyAttributes": [],
        "RowVersion": null
      }
    }
  ],
  "RequestId": null
}
```

Response

JSON

```
{
  "ResponseName": "msdyn_SearchResourceAvailabilityForRequirementGroup",
  "Results": [
    {
      "Key": "TimeSlots",
      "Value": {....}
    },
    {
      "Key": "Requirements",
      "Value": {....}
    },
    {
      "Key": "ProposalResourceAssignmentSets",
      "Value": {....}
    },
    {
      "Key": "PagingInfos",
      "Value": {....}
    }]
}
```

Create Requirement Group Bookings API

Use the following input and output parameters for the Create Requirement Group Bookings (**msdyn_CreateRequirementGroupBookings**) API.

Parameters

Name	Type	Required	Description
Version	String	Yes	The version number of the API. The version number identifies the version of the API that should be invoked. The version number is a semantic version number of the format major.minor.patch. The request does not have to contain the complete version number.
RequirementGroup	EntityReference	Yes	An entity reference to the requirement group entity, usually is a GUID, as shown in the below sample.
Start	DateTime	Yes	Start time of the Timeslot.
Duration	Integer	Yes	The Duration of the Booking to be created.
ResourceAssignments	EntityCollection	Yes	It is an entity collection of the Resource Assignments that are to be made for the Bookings to be created. Look at the Resource Assignment entity table for more details

Resource Assignments

Name	Type	Required	Description
RequirementId	Guid	Yes	The resource requirement Id of the Requirement for which the booking record is to be created.
ResourceId	Guid	Yes	The bookable resource Id of the Resource for which you want to create the booking.
BookingStatusId	Guid	Yes	The booking status Id of the booking to be created.
Effort	Integer	No	The capacity of the Bookable Resource that is consumed by this booking.
TravelTime	Integer	No	The travel time in minutes.

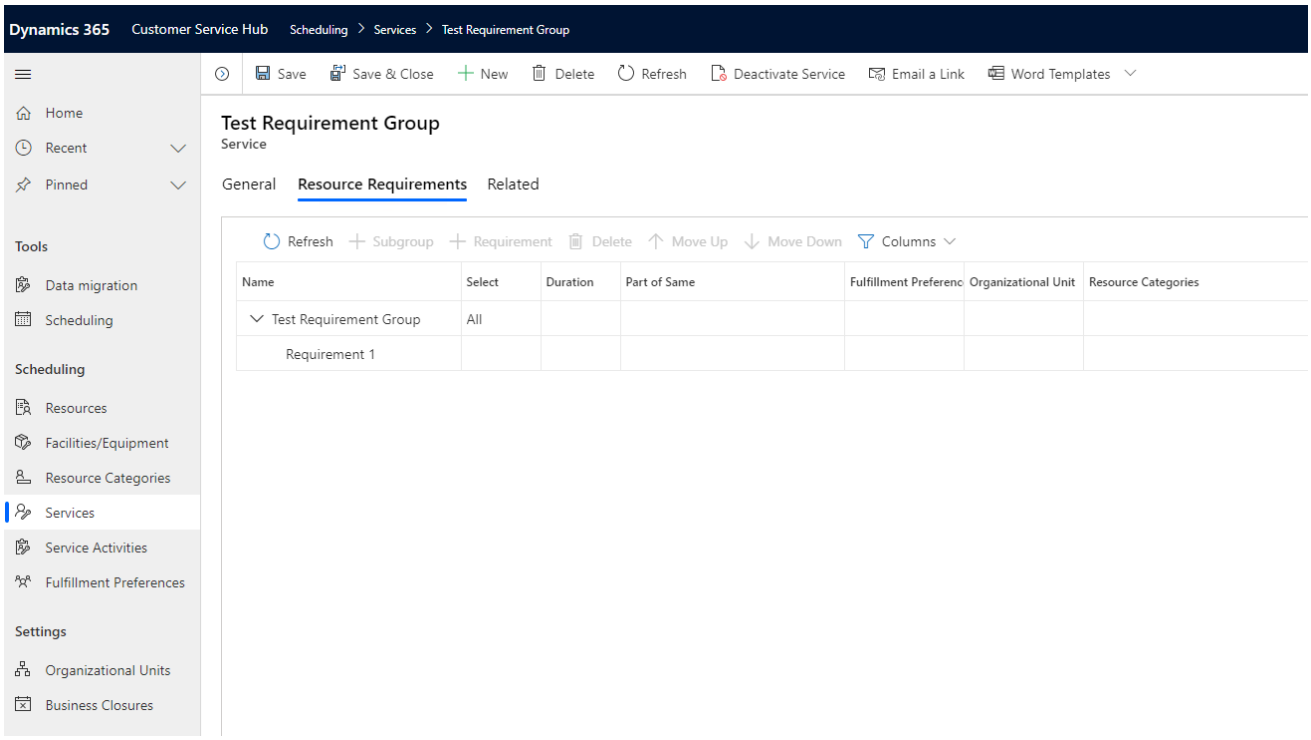
Output

Returns `HandlerExecuted` value which is of Boolean type.

Using the Requirement Group API

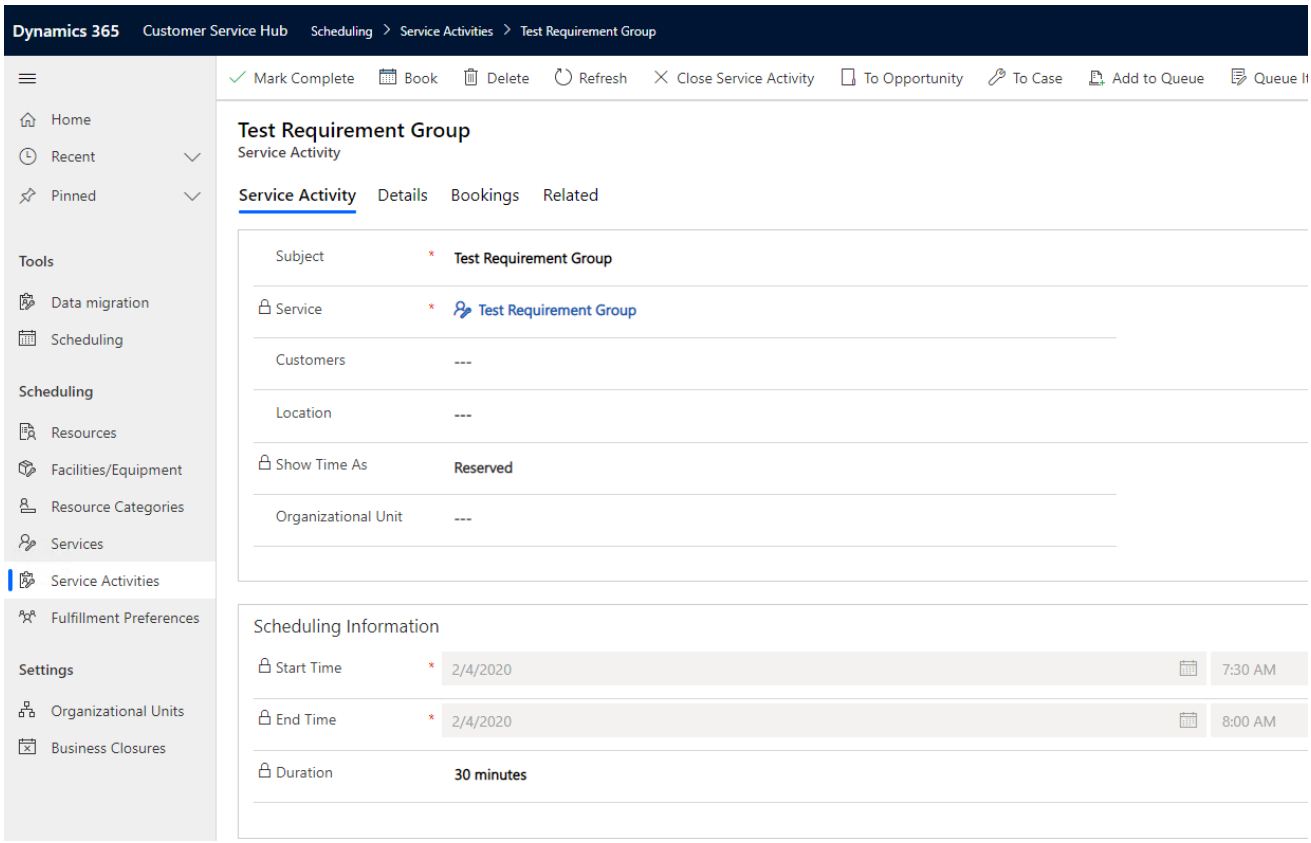
In the following scenario, you schedule a requirement group via API. You'll need a service created with resources before you can schedule a booking. Follow these steps to create a service activity.

Service configuration



1. In the site map, under **Scheduling**, select **Service**.
2. Go to **Resource Requirements**.
3. Create a service activity. For this example, we've created **Test Requirement Group**.

Service Activity configuration



1. In the site map, under **Scheduling**, select **Service Activities**.
2. Go to **Service Activities**.
3. For **Subject**, select **Test Requirement Group**.
4. For **Service**, select **Test Requirement Group**.

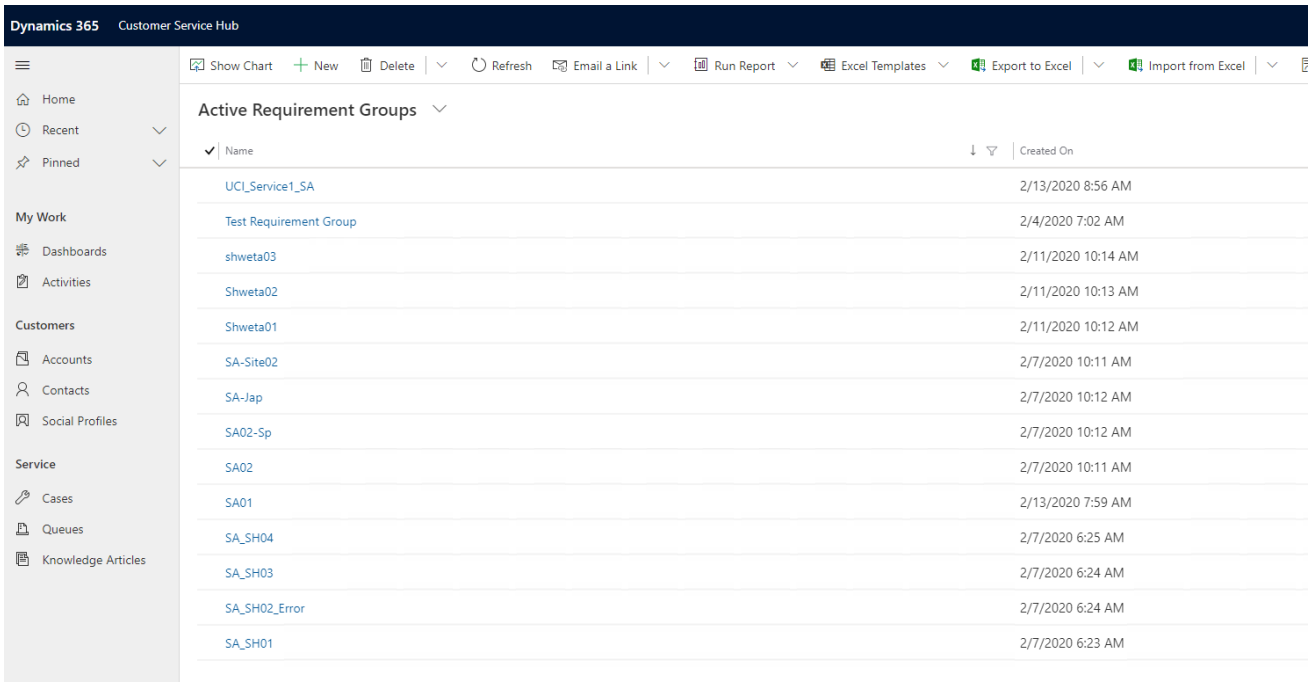
> ⓘ Note

This automatically creates a resource requirement group that has the same name as the service activity.

Now you have a requirement group automatically created that has one technician (resource) to be scheduled to perform service at your customer's location.

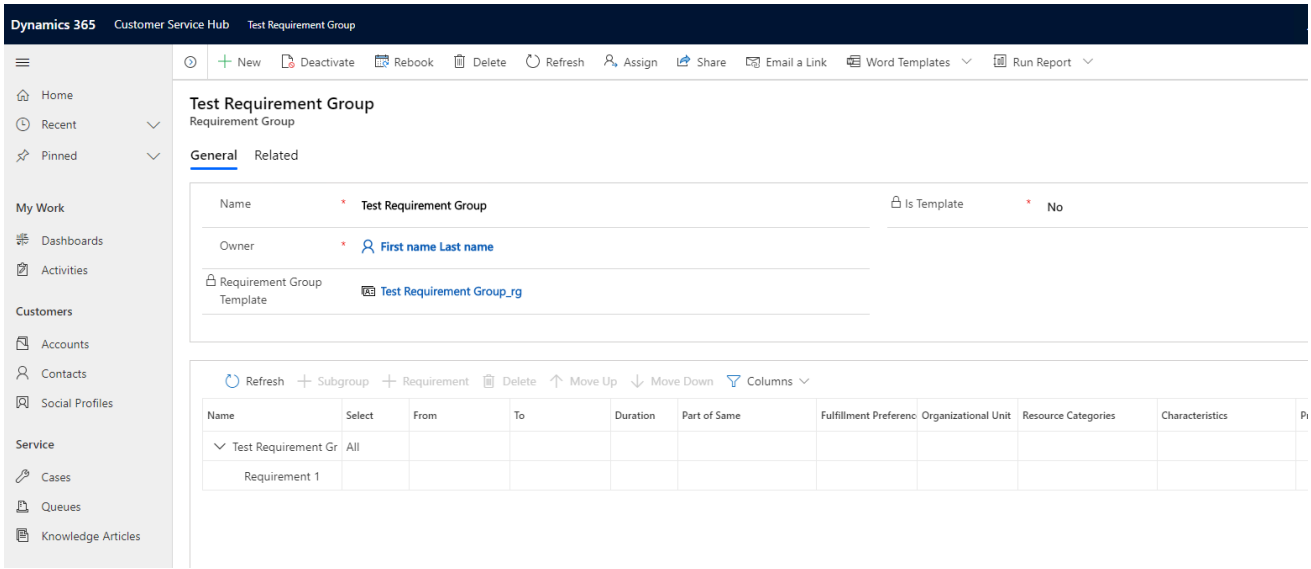
Resource Requirement Group grid

The following image is an example configuration of the Resource Requirement Group page.



> **Note**
>
> To access the **Requirement Group** page from the Customer Service Hub app, you need to navigate there via a URL.

> **Important**
>
> Use the following URL to reach the **Resource Requirements Group** page: `<<YourOrgURL>YourOrgURL>?appid=guid&pagetype=entitylist&etn=msdyn_requirementgroupr`.



3. Go to **General**.
4. Name field **Test Requirement Group**.

5. Enter name in **Owner** field.
6. Template field.
7. Template Required, select **No**.

Search against your organization

In this next scenario, we show how to pass values for a specific requirement group (Entity Reference - GUID), Required Resources to complete work and match the resource to the organizational unit.

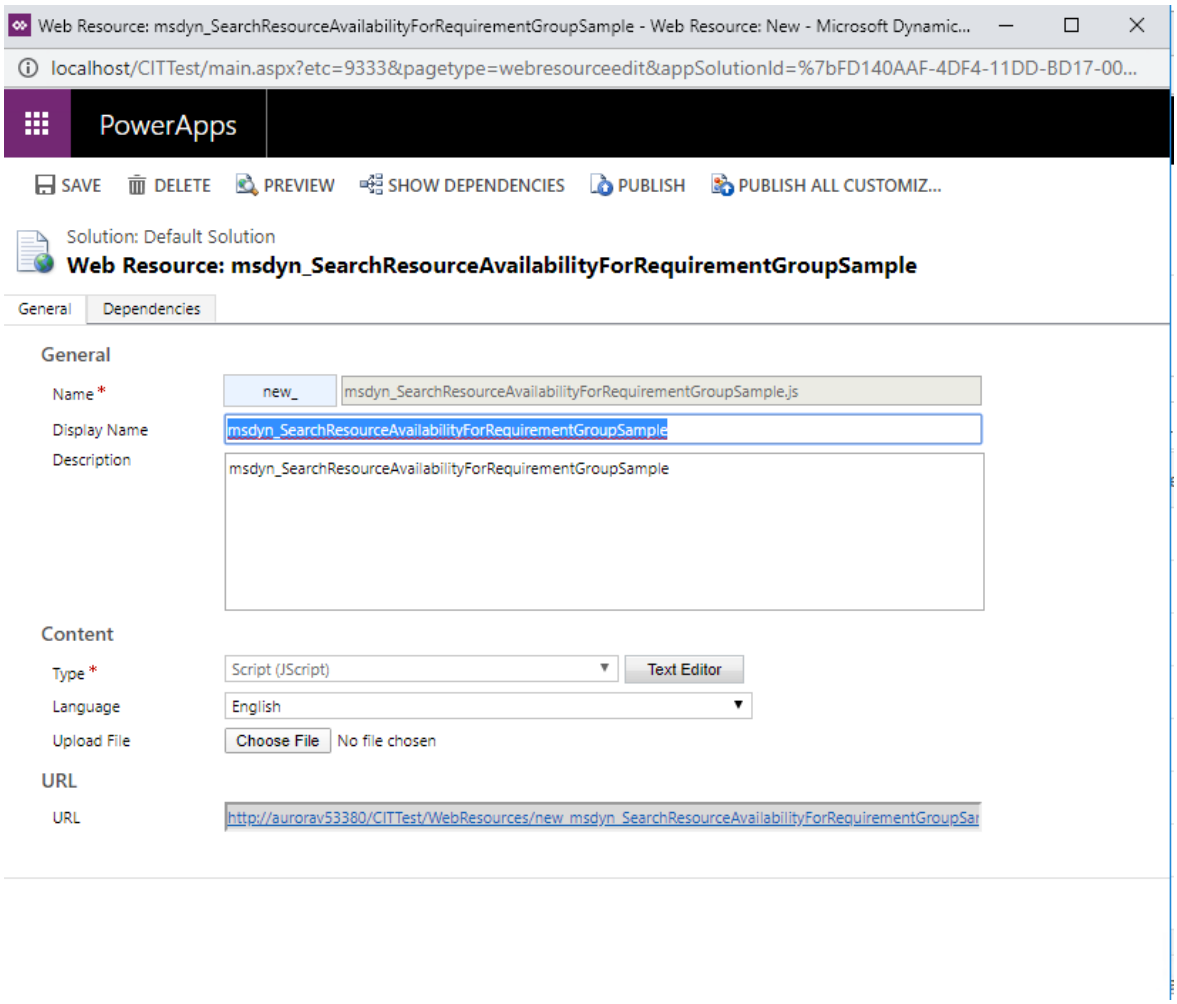
> **Important**
>
> - To run the Requirement Group API, you need GUIDs for:
>   - Requirement group
>   - Bookable resources
>   - Organizational unit (which can be retrieved by using the **Web API**)
> - If the API is called from a client (browser or canvas app) based on JavaScript, you need to have the extended SOAP SDK. The extended SOAP SDK is not an official Microsoft release, but you can is provided in the downloadable sample files for guidance.
> - We recommend that you test this search in your development or test environments to validate your scenarios and results before running it in your production environment.
> - This API uses the complex object type in the input and output, so it only supports the SOAP endpoint. It does not support the OData endpoint.

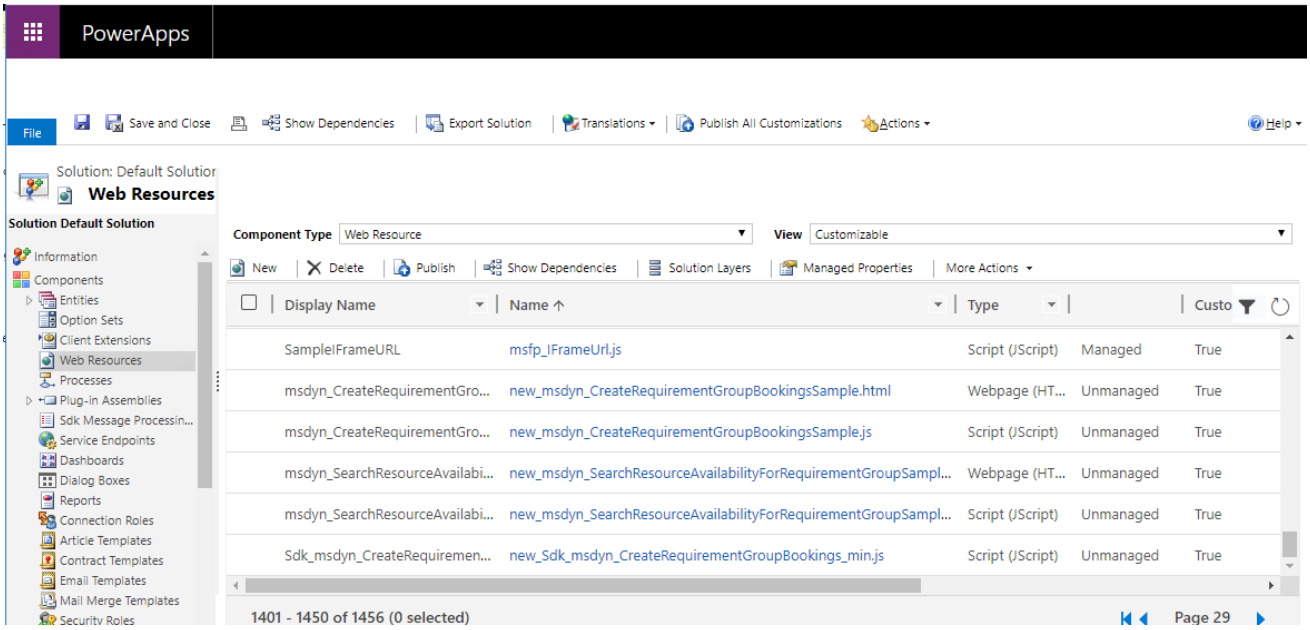
To execute this search against your organization, you need to download the sample files, and then follow the steps below:

1. Modify the hard-coded input parameters in the msdyn_SearchResourceAvailabilityForRequirementGroupSample.js file to reflect the GUIDs of records in your org. (Example: requirement group, resources, organizational unit).

Sample Search Requirement Group

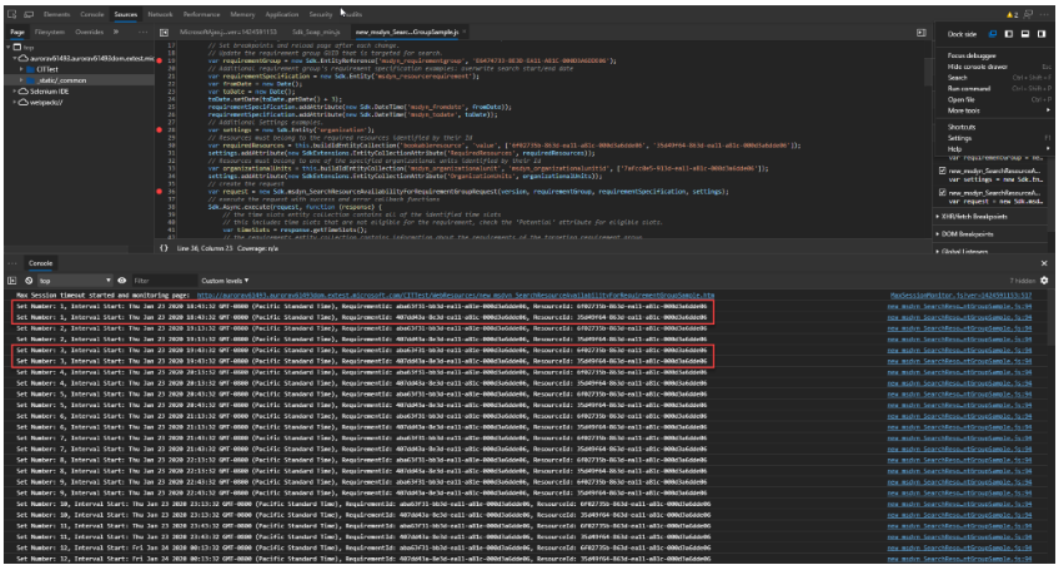
2. Add the files in the sample folder as web resources in your organization





3. Navigate to the newly added new_msdyn_SearchResourceAvailabilityForRequirementGroupSample.htm page. Example: `<<YourOrgURL>>//WebResources/new_msdyn_SearchResourceAvailabilityForRequirementGroupSample.htm`

4. Open the browser's developer tools by using the F12 function key. Set breakpoints as needed, and inspect the request/responses in the developer tool's console.



We can see there are multiple sets of time slots that are returned with each Set corresponding to a matching available Resource mapped to the underlying Requirement of the Requirement Group.

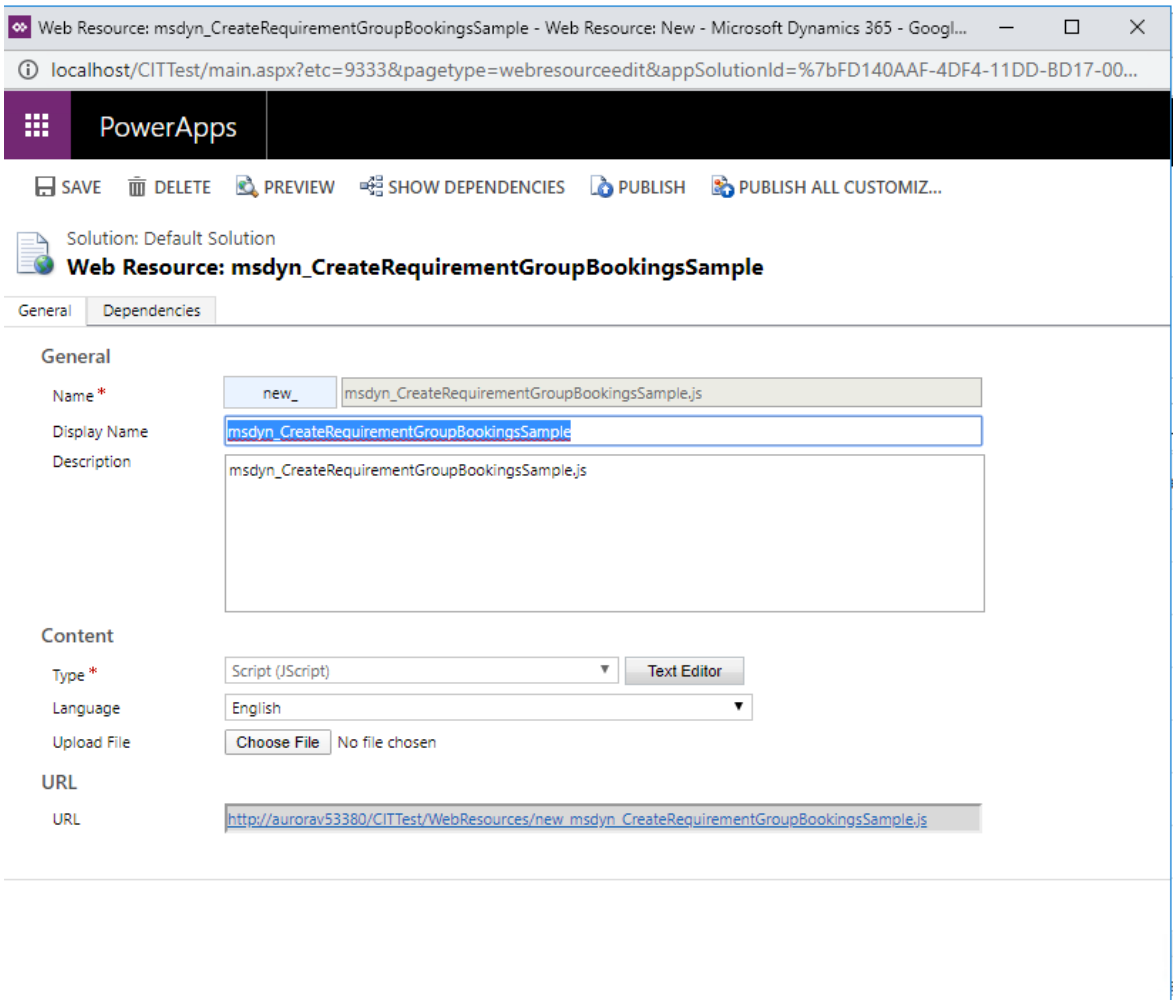
After the time slot Sets are returned by the API, you can display them on your custom web portal, app, or a Power App (model/canvas).

5. After you choose a specific time slot set (Set number 1 in this example), update your new_msdyn_CreateRequirementGroupBookingsSample.js web resource in your org to pass the Resource Assignments (Requirement guid, Resource guid) and the Requirement Group as shown in the example below:

```
"use strict";
/* tslint:disable:no-console */
var SampleCreateRequirementGroupBookings = /** @class */ (function () {
    function SampleCreateRequirementGroupBookings() {
    }
    /**
     * Sends a msdyn_CreateRequirementGroupBookings request and logs output to the console.
     */
    SampleCreateRequirementGroupBookings.prototype.sendRequest = function () {
        // enable the extended behavior that allows nested entities to be present in the SOAP payload.
        SdkExtensions.Mode.enableNestedEntities(true);
        // version is a required parameter
        var version = '1';
        // Update the Guid identifiers to match identifiers in your dev/test organization.
        // Selectively change or comment/uncomment some of the below values to see the impact on the results.
        // Set breakpoints and reload page after each change.
        // Update the requirement group GUID that is targeted for search.
        var requirementGroup = new Sdk.EntityReference('msdyn_requirementgroup', 'D4D0E0B7-0216-EA11-A81C-000D3AC4134D');
        // update the bookings start time.
        var start = new Date(Date.now());
        // update the bookings duration.
        var duration = 60;
        // update the resource assginments for each requirement in the requirement group
        var resourceAssignmentscollection = new Sdk.EntityCollection();
        this.addResourceAssignments('DBD0E0B7-0216-EA11-A81C-000D3AC4134D', '68DA7A1C-F6FE-4C48-BA54-D1C26E49CB90', resourceAssignmentscollection);
        this.addResourceAssignments('D6D0E0B7-0216-EA11-A81C-000D3AC4134D', '13E393FB-5153-4E92-BA9B-EA90066383FE', resourceAssignmentscollection);
        // create the request
        var request = new Sdk.msdyn_CreateRequirementGroupBookingsRequest(version, start, duration, resourceAssignmentscollection, requirementGroup);
        // execute the request with success and error callback functions
        Sdk.Async.execute(request, function (response) {
            // the time slots entity collection contains all of the identified time slots
            // this includes time slots that are not eligible for the requirement, check the 'Potential' attribute for eligible slots.
            var handlerExecuted = response.getHandlerExecuted();
            console.log("Handler Executed: " + handlerExecuted);
        }, function (error) {
            console.log(error.message);
        });
    };
    /**
     * Creates an entity collection of mappings of requirment and resource assignments.
     * @param requirementId The requirement Id.
     * @param resourceId The resource Id.
     * @param resourceAssignmentscollection the resource assignments for each requirement in the requirement group.
     */
    SampleCreateRequirementGroupBookings.prototype.addResourceAssignments = function (requirementId, resourceId, resourceAssignmentscollection) {
        var assignment = new Sdk.Entity('organization');
        assignment.addAttribute(new Sdk.Guid('RequirementId', requirementId));
        assignment.addAttribute(new Sdk.Guid('ResourceId', resourceId));
        resourceAssignmentscollection.addEntity(assignment);
    };
    return SampleCreateRequirementGroupBookings;
}());
// execute the request now
```

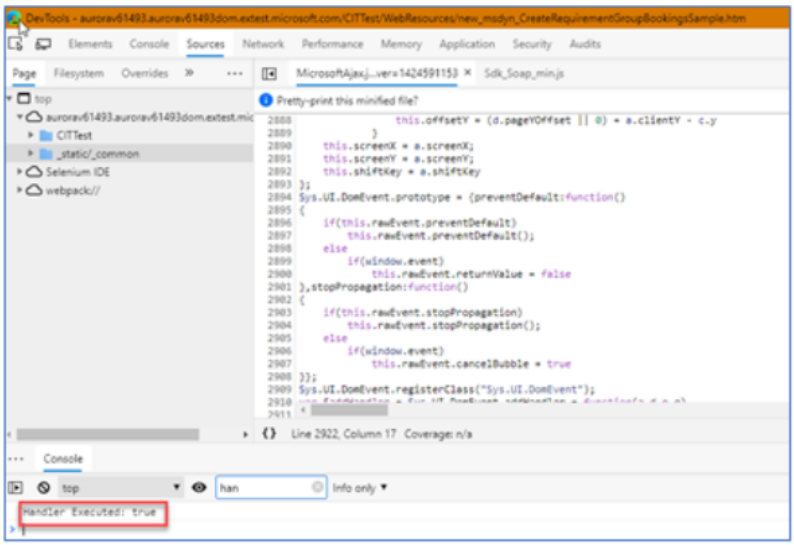
> **Important**

Find the complete sample code here: **Create Requirement Group**.

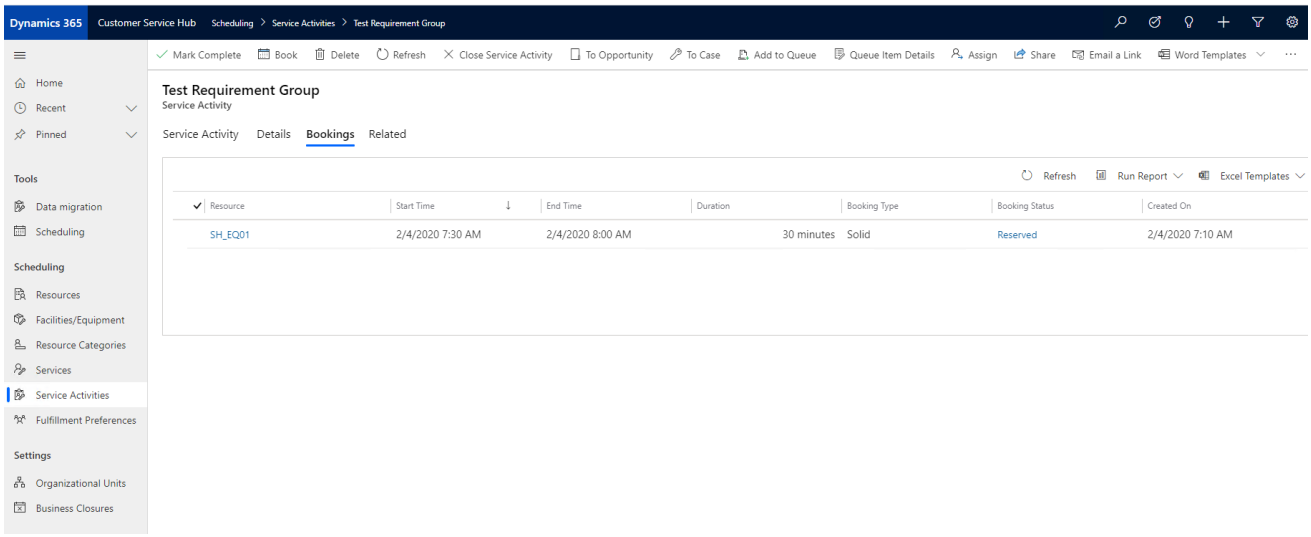


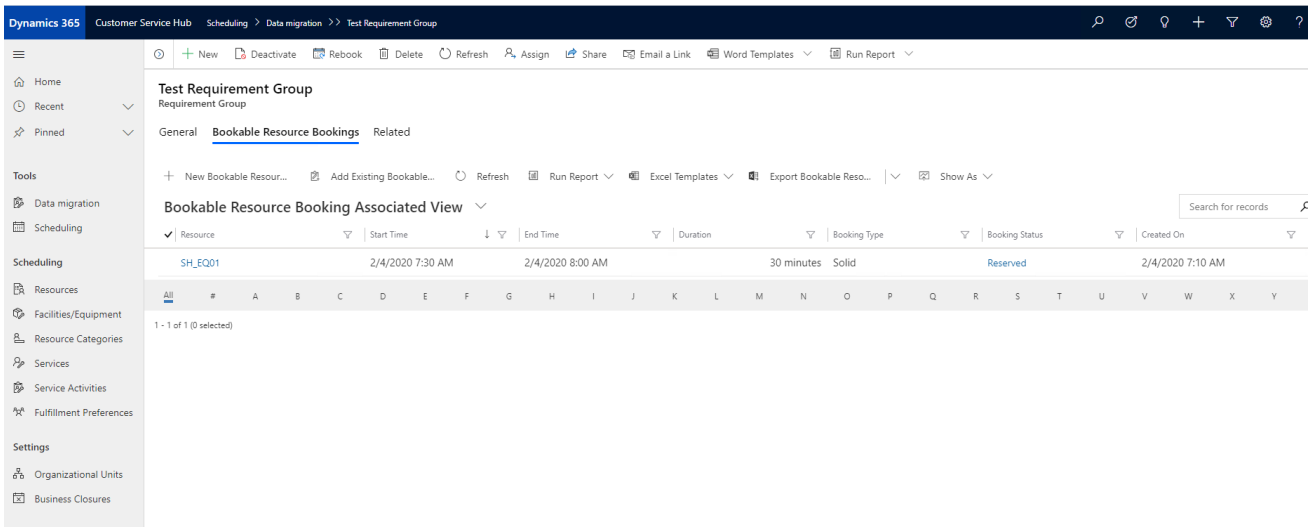
6. Navigate to the newly added new_ msdyn_CreateRequirementGroupBookingsSample.htm page. (Example: `<<YourOrgURL>>//WebResources/new_msdyn_CreateRequirementGroupBookingsSample.htm`) to invoke a call to the Booking API and create the booking.

7. Open the browser's developer tools by using the F12 function key. Here you'll see that the Handler executed value is set to True, indicating that the bookings were created successfully.



We can also verify this by going back into the organization and checking the associated bookings of the Service/Requirement group we created, as shown in the following illustrations.





Other possible scenarios that might leverage these APIs are:

- Build a custom web app or a Dynamics 365 portal to provide appointment scheduling for users. The app will show available time slots for the service or product being offered by using multiresource requirements (requirement groups).
- Build a Power Apps canvas app to support self-scheduling scenarios for line-of-business apps.

See the Additional resources section for links to additional help resources.

Sample code

The following sample code shows how to implement `msdyn_SearchResourceAvailabilityForRequirementGroup` message.

static

```
        {
            // Authentication
            String machineName = "contoso?????";
            String orgName = "?????";
            String domain = $"{machineName}dom.extest.microsoft.com";
            String uri = $"http://{machineName}.{domain}/{orgName}/XRMServices/2011/Organization.svc";
            String username = "?????";
            String password = "?????";

            OrganizationServiceManager osm = new
            OrganizationServiceManager(new Uri(@uri), username, password, domain);
            _serviceProxy = osm.GetProxy();
            _service = (IOrganizationService)_serviceProxy;
            searchResourceAvailabilityForRequirementGroup();
            createRequirementGroupBookings();
```

```
        }

        static void searchResourceAvailabilityForRequirementGroup()
        {
            var req = new OrganizationRequest()
            {
                RequestName = "msdyn_SearchResourceAvailabilityForRequirementGroup"
            };

            //Version
            req["Version"] = "1.0.0";
            req["RequirementGroup"] = new EntityReference("msdyn_requirementgroup", Guid.Parse("e5e4f033-150d-
eb11-a822-000d3aaf102a"));

            Entity requirementSpecification = new Entity();
            requirementSpecification.Attributes.Add("msdyn_fromdate", DateTime.Today.AddDays(1));
            requirementSpecification.Attributes.Add("msdyn_todate", DateTime.Today.AddDays(3));
            req["RequirementSpecification"] = requirementSpecification;

            try
            {
                var response = _service.Execute(req);
                Console.WriteLine("Response from search: {0}", JsonConvert.SerializeObject(response));
            }
            catch (Exception e)
            {

                Console.WriteLine("msdyn_SearchResourceAvailabilityForRequirementGroup failed with the following
error: {0}", e.Message);
            }
        }

        static void createRequirementGroupBookings()
        {
            var req = new OrganizationRequest()
            {
                RequestName = "msdyn_createRequirementGroupBookings"
            };

            req["Version"] = "1.0.0";
            req["RequirementGroup"] = new EntityReference("msdyn_requirementgroup",
            Guid.Parse("d74260ee-180d-eb11-a822-000d3aaf102a"));
            req["Start"] = DateTime.Today.AddDays(1);
            req["Duration"] = 60;
            EntityCollection resourceAssignment = new EntityCollection();
            var entity = new Entity();
            entity["RequirementId"] = Guid.Parse("df4260ee-180d-eb11-a822-000d3aaf102a");
            entity["ResourceId"] = Guid.Parse("268e3d0d-5e0c-eb11-a822-000d3aaf102a");
            entity["BookingStatusId"] = Guid.Parse("10de5842-cf5e-4092-9006-d0aa9f9c1f74");
            resourceAssignment.Entities.Add(entity);
            req["ResourceAssignments"] = resourceAssignment;

            try
            {
                var response = _service.Execute(req);
                Console.WriteLine("Response JSON : " + JsonConvert.SerializeObject(response));
            }
            catch (Exception e)
            {
                Console.WriteLine("msdyn_createRequirementGroupBookings request failed with the following
exception: {0}", e.Message);
            }
            Console.ReadKey();
        }
```

How to migrate from the legacy API to Universal Resource Scheduling

To migrate from the legacy Search API and Book API to the Universal Resource Scheduling API, use the following required input and output fields to map the APIs.

Input mapping data for the Search API

Legacy input	Universal Resource Scheduling input	Description
ServiceId	Requirement group	Service/requirement group GUID
SearchWindowStart	Start date	Start date for the appointment search
SearchWindowEnd	End date	End date for the appointment search
Duration	Duration	Appointment duration
No of results	Page size	Total number of proposals or number of appointments on a page
Sites	OrganizationUnits	Site/OU GUID
RequiredResource	Preferred Resources	Resources the customer prefers to schedule
Constraints	Constraints	Customer entity(ufx)
RecurrenceDuration		In a recurrence appointment search, the duration of the appointment
RecurrenceTimeZoneCode		Time zone for a recurring request
SearchDirection		Forward or backward search for slots, based on the dates given
AnchorOffSet		Offset in hours from midnight
UserTimeZoneCode		Time zone that's been set for the user
SearchRecurrenceRule		Frequency, interval, count and so on
	Resource Types	Type of resource
	Restricted Resources	Restricted for scheduling the appointment

Output mapping for the Search API

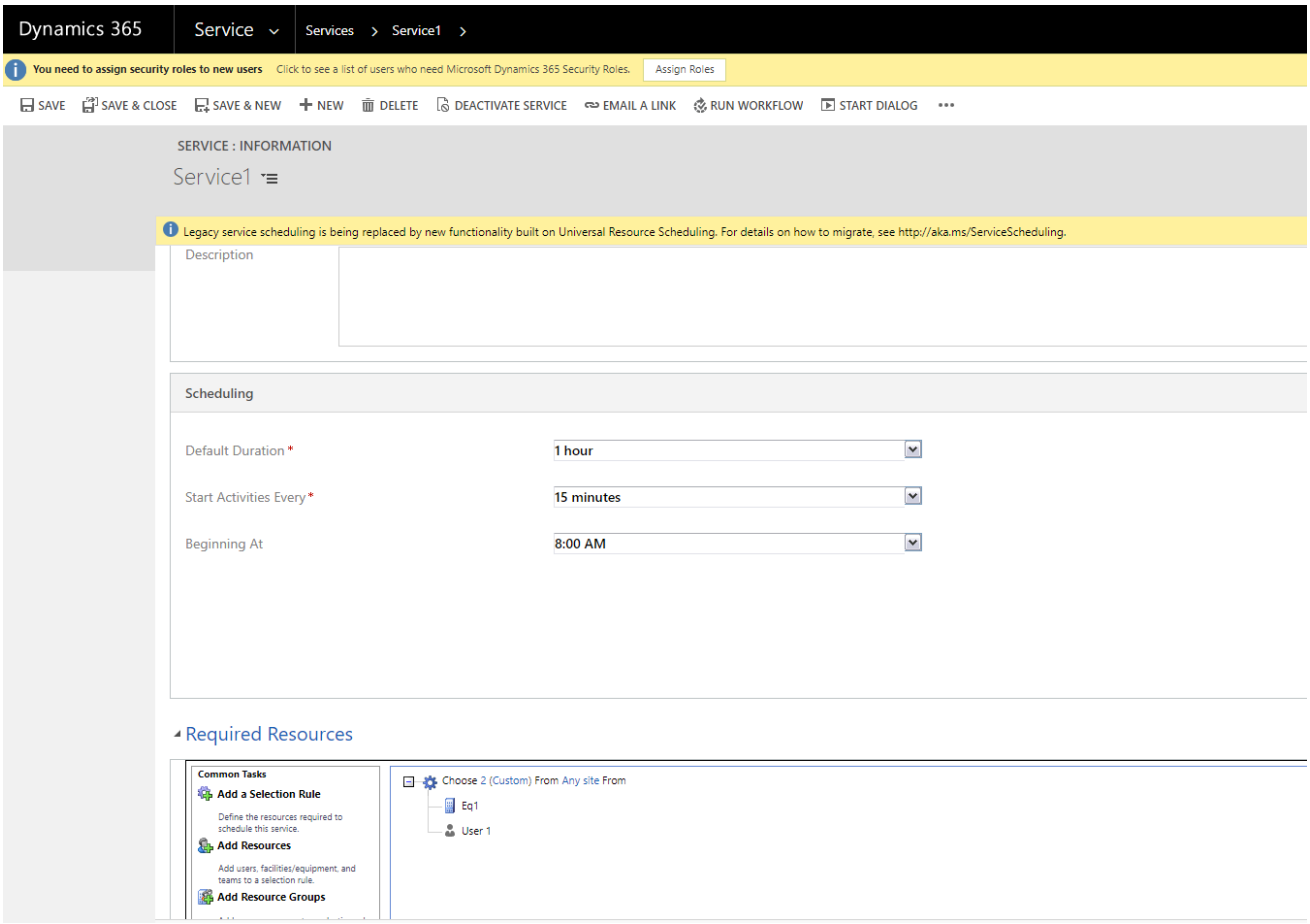
Legacy output	Universal Resource Scheduling output
Appointment proposals	ProposalsResourceAssignmentSet
TraceInfo	
ExtensionDataObject	
	Time Slots
	Requirements(constraintbag)
	PagingInfos

Example scenarios for migrating from the legacy scheduling API to Universal Resource Scheduling

The scenario-based examples in this section add more details about mapping from the legacy API to the new Universal Resource Scheduling API.

Scenario 1: Get two resources for each schedule proposal

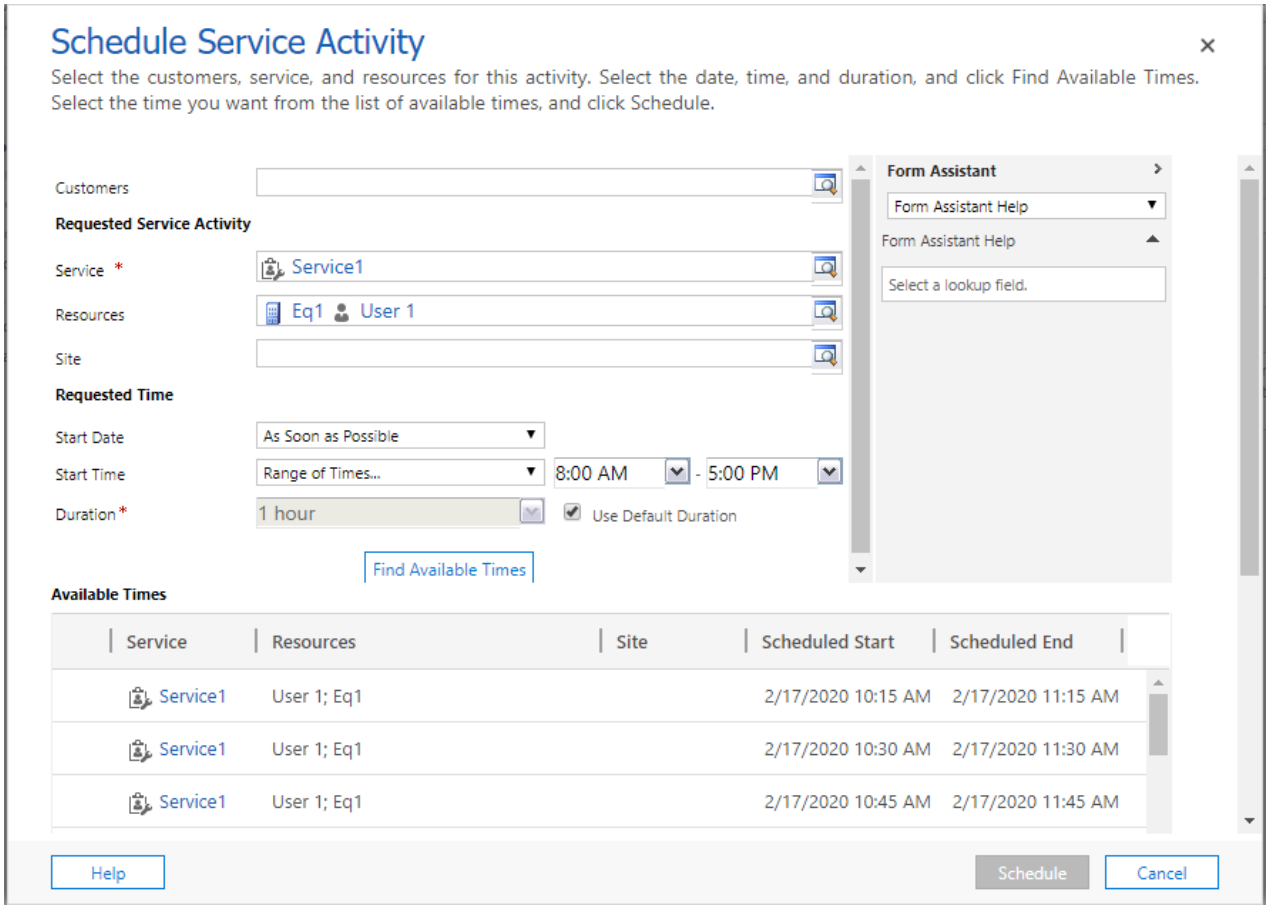
The following screenshot from the legacy API is provided for reference in this scenario.



1. Create one site (**Site1**), one user (**User1**), and one equipment resource (**Facility/Equipment** tab), with the name **Eq1**, with the site set to **Site1**.

2. Create the business closure and work hours for the user (8:00 AM to 6:00 PM) and the equipment (8:00 AM to 6:00 PM).

3. Create a new service (**Service1**), and then add **required resources** as **Choose 2** from User1, Eq1. Save and close the service.



4. Go to the homepage and schedule a service activity and then, select **Service1**, and then select **Schedule** > **Find available slots**.

5. Verify that two resources are returned for each proposal in accordance with the criteria you set.

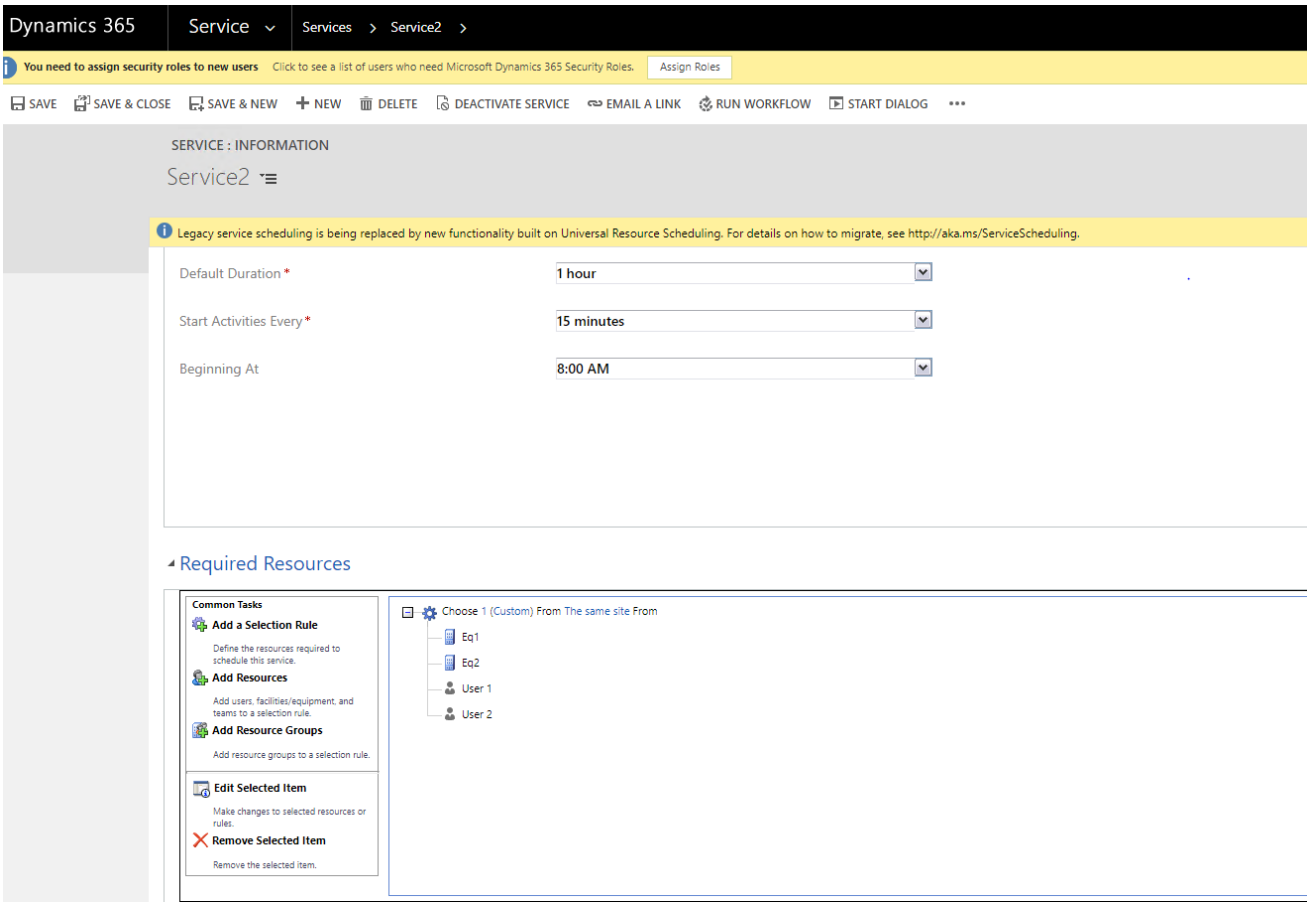
Universal Resource Scheduling API code for scenario 1

C#

```
void searchRequirementgroup(Microsoft.Pfe.Xrm.OrganizationServiceManager osm)
{
var req = new Microsoft.Xrm.Sdk.OrganizationRequest()
{
RequestName = "msdyn_SearchResourceAvailabilityForRequirementGroup"
};

  req["Version"] = "1.0.0";
  Entity requirementSpecification = new Entity();

  //Setting from date

  requirementSpecification.Attributes.Add("msdyn_fromdate", DateTime.Parse("2019-12-
  26T18:30:00.000Z"));

  //Setting to date

  requirementSpecification.Attributes.Add("msdyn_todate", DateTime.Parse("2019-12-
  27T18:29:00.000Z"));

  //Requirement group GUID
  req["RequirementSpecification"] = requirementSpecification;
  req["RequirementGroup"] = new
  Microsoft.Xrm.Sdk.EntityReference("msdyn_requirementgroup", Guid.Parse("XXXXXXXX"));

  //Executing the request and getting response
  var response = osm.GetProxy().Execute(req);
  response.ToString();
  response.Dump();
}
```

Scenario 2: Verify that search results are correct for scheduling

The following screenshot from the legacy API is provided for reference in this scenario.

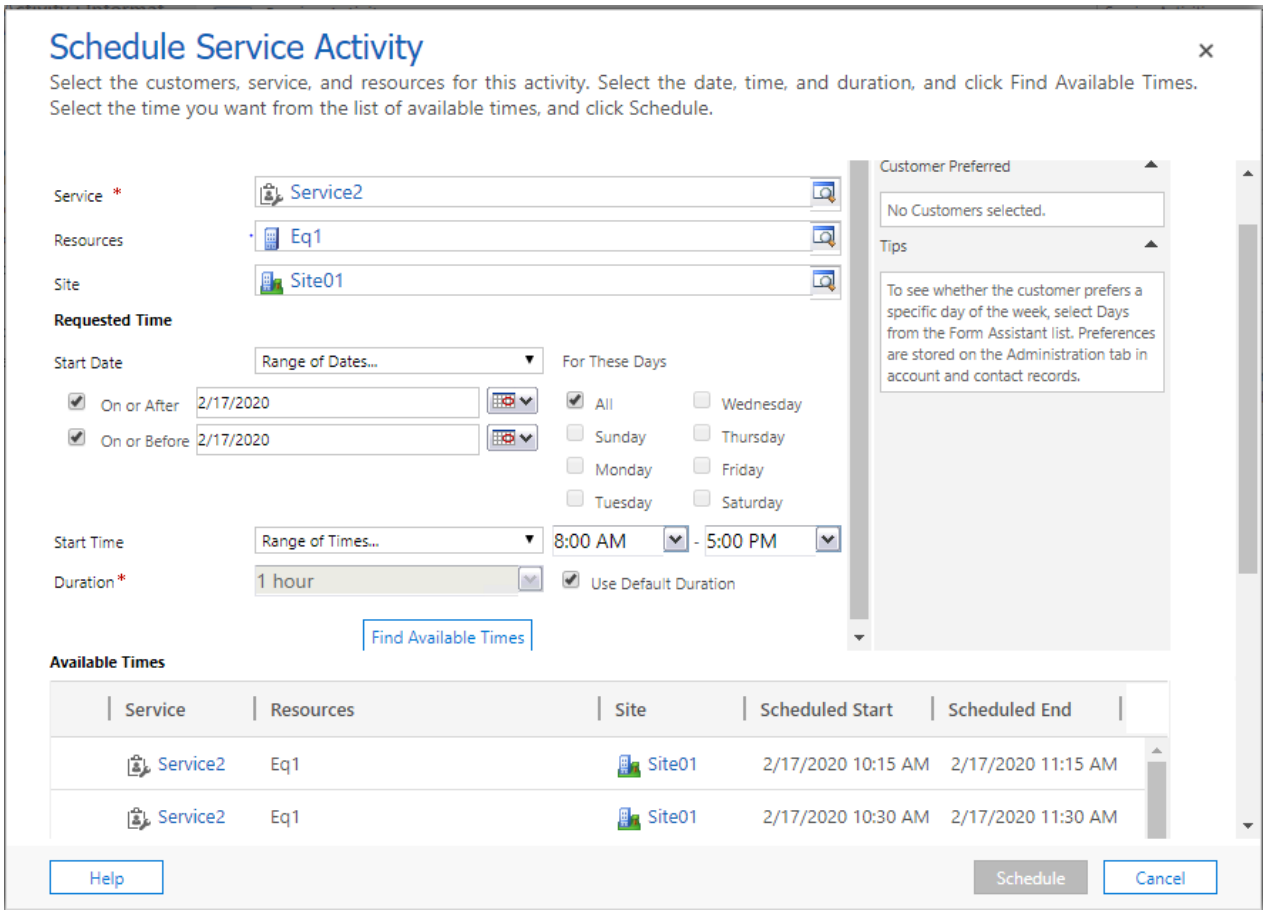


1. Create the following:

- Two sites: Micr0s0ftSite1 and Site2
- Two users: User1 and User2 (Site2)
- Go to **Settings**> **Service management** tab and create a site(with the name `Site1`), two resources on the **Facility/Equipment** tab (namely, Eq1 and Eq2) and go to setting> Security and create a user(User1). Two equipment resources on the **Facility/Equipment** tab (Eq1, Eq2), where Eq1 belongs to Site1 and Eq2 belongs to Site2

2. Create the business closure and work hours for the user (8:00 AM to 6:00 PM) and the equipment (8:00 AM to 6:00 PM).

3. Create a new service with status **Reserved** and required resources as **Choose 2** from **same site** from User1, User2, Eq1, Eq2. Save and close the service.



4. Go to the homepage > **Service Activity** > **Schedule**, and then select the service you created in step 3. Select the site as **Site1**, and then click on **Find available time**.

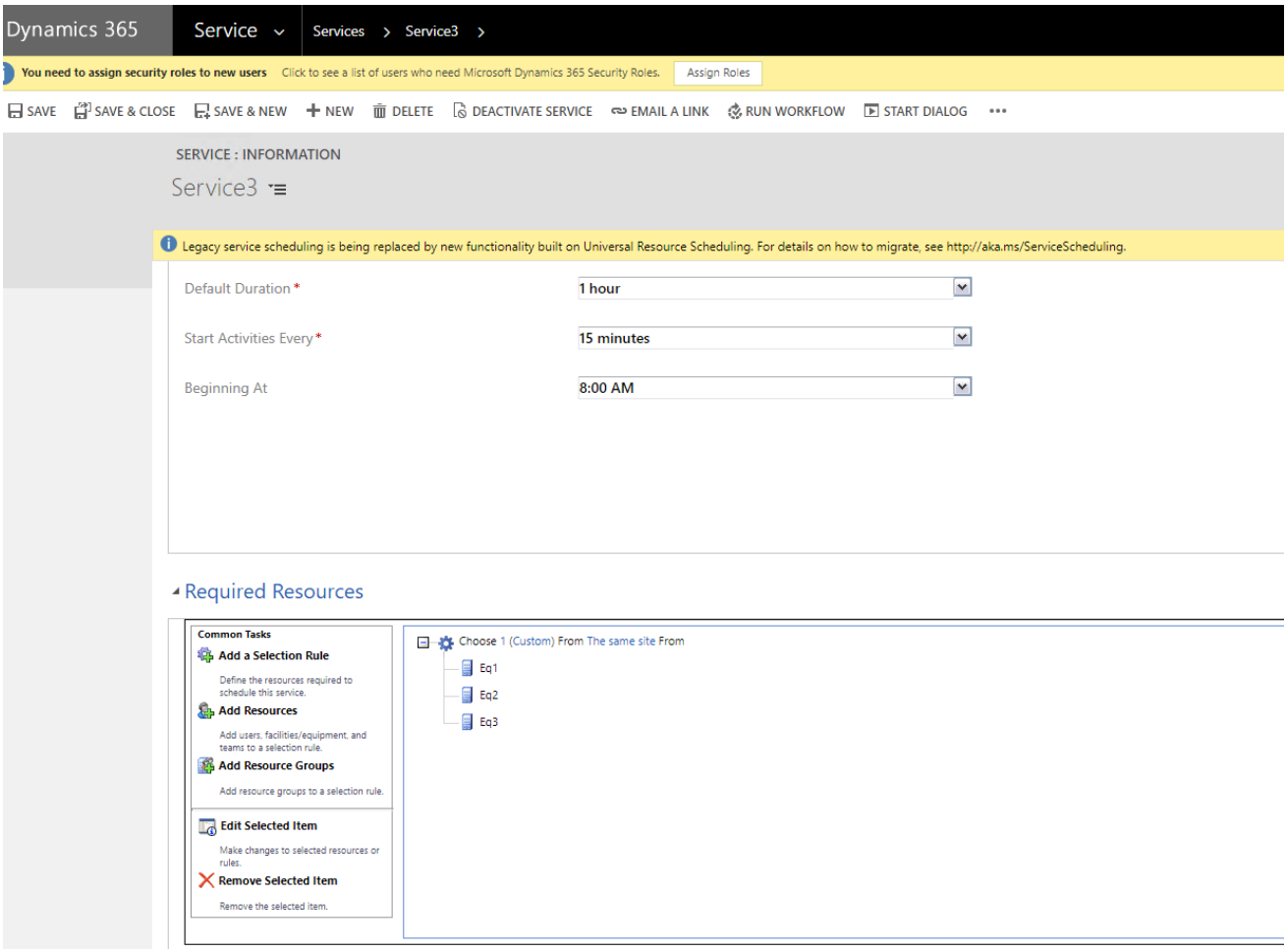
5. Verify that the search results that are returned are correct for the site selected in the search criteria.

Universal Resource Scheduling API code for scenario 2

C#

```
void searchRequirementgroup(Microsoft.Pfe.Xrm.OrganizationServiceManager osm)
{
  var req = new Microsoft.Xrm.Sdk.OrganizationRequest()
  {
  RequestName = "msdyn_SearchResourceAvailabilityForRequirementGroup"
  };
req["Version"] = "1.0.0";
Entity requirementSpecification = new Entity();

//Setting from date
requirementSpecification.Attributes.Add("msdyn_fromdate", DateTime.Parse("2019-12-26T18:30:00.000Z"));

//Setting to date
requirementSpecification.Attributes.Add("msdyn_todate", DateTime.Parse("2019-12-27T18:29:00.000Z"));

req["RequirementSpecification"] = requirementSpecification;

//Requirement group GUID
req["RequirementGroup"] = new EntityReference("msdyn_requirementgroup", Guid.Parse("XXXXXX"));

var response = osm.GetProxy().Execute(req);
response.ToString();
response.Dump();

}
```

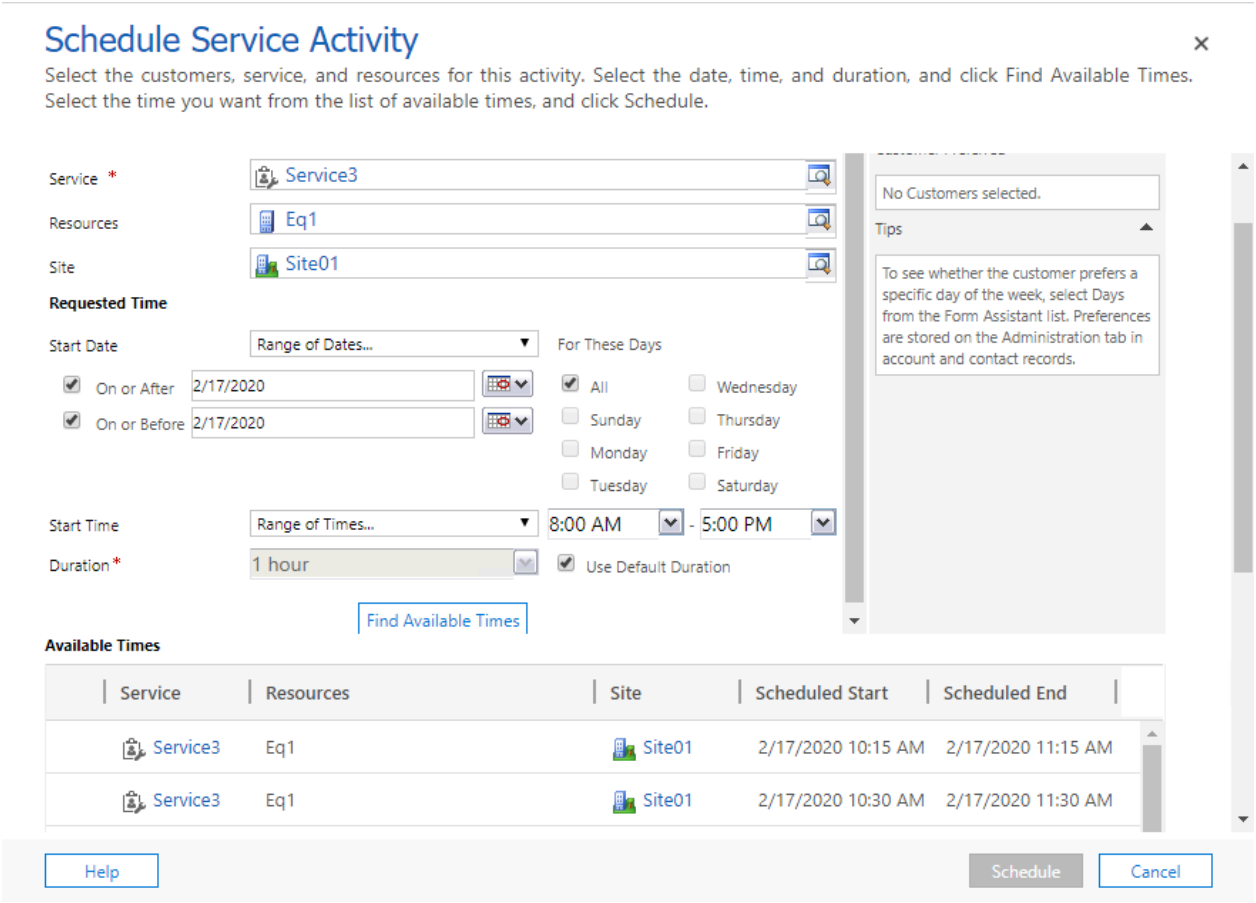
Scenario 3: Get proposed schedules that occur within the working hours for an equipment resource



1. Create two sites (Site1, Site2), and then create three equipment resources (Eq1, Eq2, Eq3).

2. Create the business closure and work hours for all equipment (3:00 PM to 6:00 PM).

3. Create a new service (**Service1**) Choose 1 from (Random) Eq1, Eq2, #q3.



4. In the **Schedule Service Activity** dialog box, search for proposals for Service1 by adding a required resource as **Eq1** for a specific date range.

5. Verify that the proposed schedules that are returned occur within the working hours of the equipment for that date.

Universal Resource Scheduling API code for scenario 3

C#

```
void searchRequirementgroup(Microsoft.Pfe.Xrm.OrganizationServiceManager osm)
{
var req = new Microsoft.Xrm.Sdk.OrganizationRequest()
{
RequestName = "msdyn_SearchResourceAvailabilityForRequirementGroup"
};
req["Version"] = "1.0.0";
Entity requirementSpecification = new Entity();

//Setting start date
requirementSpecification.Attributes.Add("msdyn_fromdate", DateTime.Parse("2019-12-26T18:30:00.000Z"));
//Setting end date
requirementSpecification.Attributes.Add("msdyn_todate", DateTime.Parse("2019-12-27T18:29:00.000Z"));

//Setting the eq1 as required resource

requirementSpecification.Attributes.Add("msdyn_resourcerequirementid",Guid.Parse("XXXXXX"));
req["RequirementSpecification"] = requirementSpecification;

//Setting the requirement group GUID
req["RequirementGroup"] = new EntityReference("msdyn_requirementgroup", Guid.Parse("XXXXX"));

//Executing the request and getting response.
var response = osm.GetProxy().Execute(req);
response.ToString();
response.Dump();
}
```

Additional resources

Resource	Description
Service Scheduling Guide	Read how you can plan and schedule service activities for your customers.
Service scheduling FAQ	Frequently asked questions on service scheduling
Multiresource scheduling with requirement groups	Use requirement groups to mix and match different types of resources.
Search Resource Availability API for single resource requirements	Blog on how to use the Search resource availability API
Overview of Dynamics 365 Field Service	The Dynamics 365 Field Service business application helps organizations deliver onsite service to customer locations.
Documentation for resource scheduling	Get started with using Universal Resource Scheduling.
Learning path for resource scheduling	Learn how to use Universal Resource Scheduling in Microsoft Dynamics 365 for Field Service
Field Service YouTube Channel	Video resources on Dynamics 365 Field Service
Dynamics 365 application ideas	Use this portal to contribute product feedback and ideas for resource scheduling.
Community forum	Use the community forum to ask questions, find answers, and see upcoming events.
Dynamics 365 blog	Read the Dynamics 365 blog for release notes and posts from the product team.

Connected Customer Service - Overview

Article • 01/15/2022

Connected Customer Service enables organizations to transform their service model into a proactive and predictive service model with the availability of IoT diagnostics, IoT device update, and case management on one platform. Agents using Customer Service Hub can diagnose and fix issues remotely, which leads to cost savings and improved customer satisfaction.

Key benefits of Connected Customer Service:

- Reduce downtime by connecting to IoT devices to diagnose problems before customers are aware of an issue
- Address issues faster by remotely monitoring and updating devices and keeping customers in the loop

There are two ways you can connect IoT-enabled devices to the Customer Service solution:

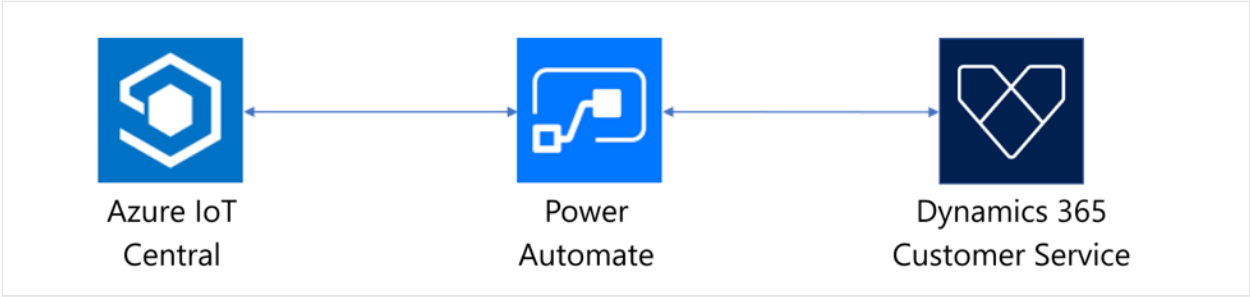
- Connected Customer Service for Azure IoT Central
- Connected Customer Service for Azure IoT Hub

The following sections describe the differences between these solutions.

Connected Customer Service for Azure IoT Central

Connected Customer Service for IoT Central provides a direct integration of Dynamics 365 Customer Service with Microsoft Azure IoT Central, a fully managed IoT software-as-a-service (SaaS) solution.

Microsoft Azure IoT Central enables builders to configure rules and actions. Based on those actions, IoT alerts will be created in Connected Customer Service. Also, based on service activities in Connected Customer Service, information can be sent back to IoT Central. This is accomplished by using Power Automate, a SaaS offering for automating workflows across applications and services.



The below end-to-end integration processes can be easily implemented based on a pure configuration experience:

- Azure IoT Central can send information about device anomalies to Connected Customer Service (as an IoT Alert) for diagnosis
- Connected Customer Service can create cases or work orders triggered from device anomalies

Azure IoT Central requires no extensive cloud development or coding skills to get an IoT solution up and running.

With Power Automate templates, users can connect their accounts, take advantage of our pre-built templates, and customize their own flows.

Check out our Connected Customer Service for IoT Central tutorial to get started.

Connected Customer Service for Azure IoT Hub

Connected Customer Service for Azure IoT Hub is an add-on solution that brings Azure IoT platform-as-a-service (PaaS) offering into Dynamics365 for Customer Service. With this offering, you can run a deployment app to put all of the Azure IoT services and Dynamics puzzles together. All Azure IoT services run in your own Azure cloud subscription. Additionally, we provide an enterprise-ready template that you can customize for each Azure IoT service.

Privacy details for Connected Customer Service

After you install Connected Customer Service for Dynamics 365 and provide your Azure subscription information, the Azure resources are deployed. Your Customer Engagement instance will send data such as commands, to Azure to enable IoT–enabled scenarios that register devices. Then, commands will be sent to and received from the registered devices.

The Azure components and services that are involved with Connected Customer Service functionality are described in the following sections.

Service bus queue

This provides a queue for both inbound and outbound messages (commands) flowing between Dynamics 365 for Customer Engagement and Azure. When an IoT alert is sent to Dynamics 365 for Customer Engagement, or a command is sent from Dynamics 365 for Customer Engagement to the IoT hub, it will be queued here.

Logic Apps

This provides an orchestration service that uses a Customer Engagement connector and a Queue connector. Dynamics 365 for Customer Engagement connectors are used to construct entities that are specific to Customer Engagement and Queue connectors are used for polling the queue.

Stream analytics

This provides a fully managed, real-time event processing engine that helps to unlock deep insights from data. Stream Analytics makes it easy to set up real-time analytic computations on data streaming from devices, sensors, web sites, social media, applications, infrastructure systems, and more. It is functioning as a funnel to send selective IoT alerts to Dynamics 365 for Customer Engagement.

IoT Hub

Connected Customer Services uses the IoT Hub to manage the state of registered devices. In addition, the IoT Hub sends commands and notifications to connected devices—and tracks message delivery with acknowledgment receipts. Device messages are sent in a durable way to accommodate intermittently connected devices.

Simulator

This is a test web app for emulating the device that is sending commands or receiving commands from the IoT hub.

Azure SQL Database

Connected Customer Service uses SQL Azure to store device heartbeat messages for later use by Power BI to show the status of devices in Dynamics 365 for Customer Engagement.

Azure Blob Storage

Queries that Stream Analytics uses are stored to Azure Blob storage.

- Connected Customer Service Device Readings (Preview) uses Azure Time Series Insight (Preview) to store, process, and query IoT devices measurements from IoT

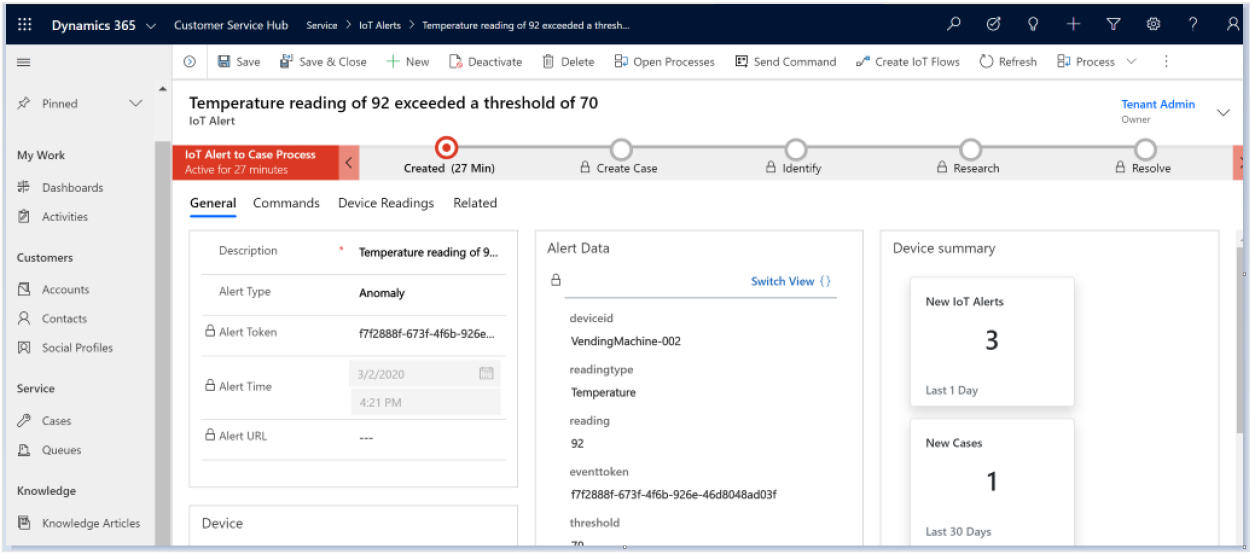
Hub.

> **Note**
>
> For more information about additional Azure service offerings, see the **Microsoft Azure Trust Center**.

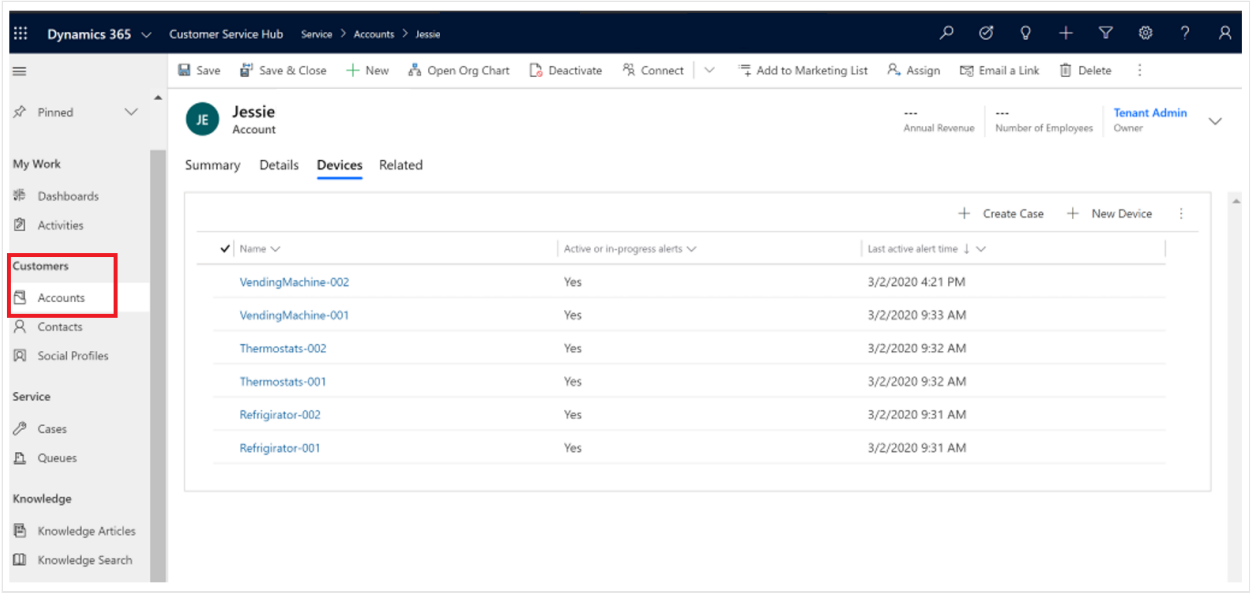
User experience for Connected Customer Service

A list of Connected Customer Service actions that agents can take is as follows:

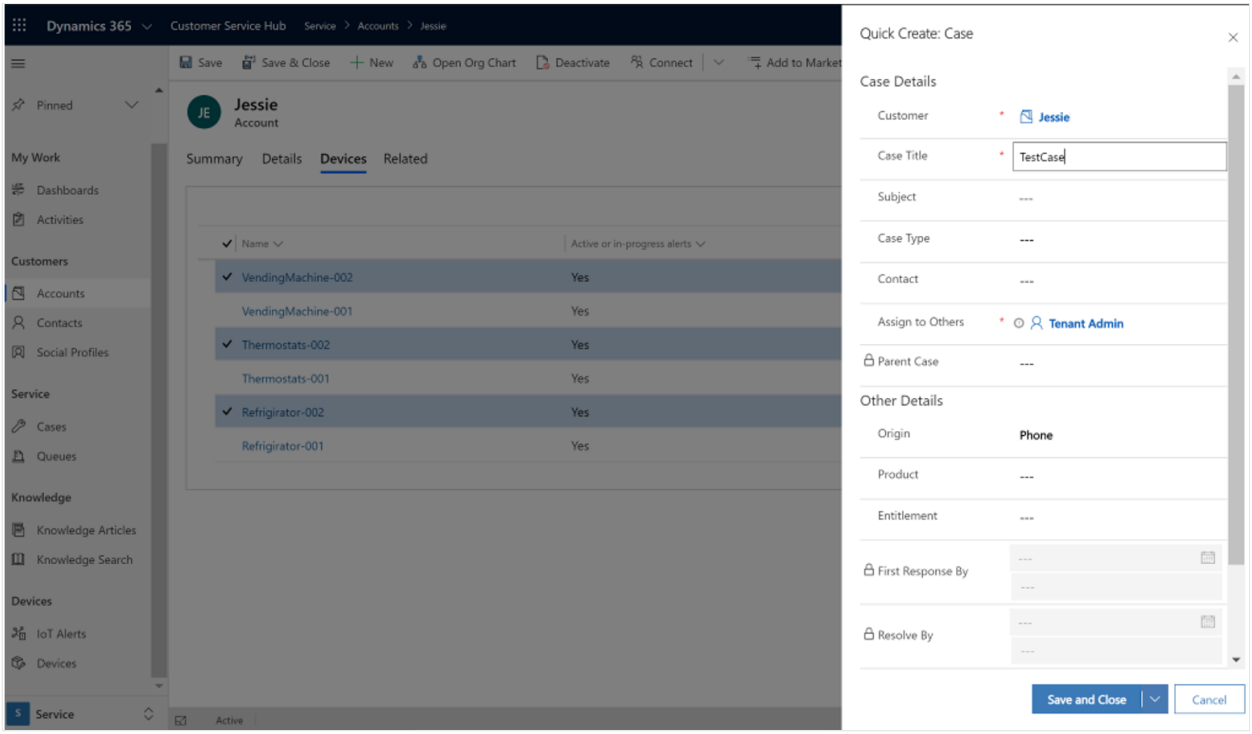
1. **Convert an IoT alert to a case**: Agents can convert an IoT alert to a case that includes pre-populated IoT alert details.



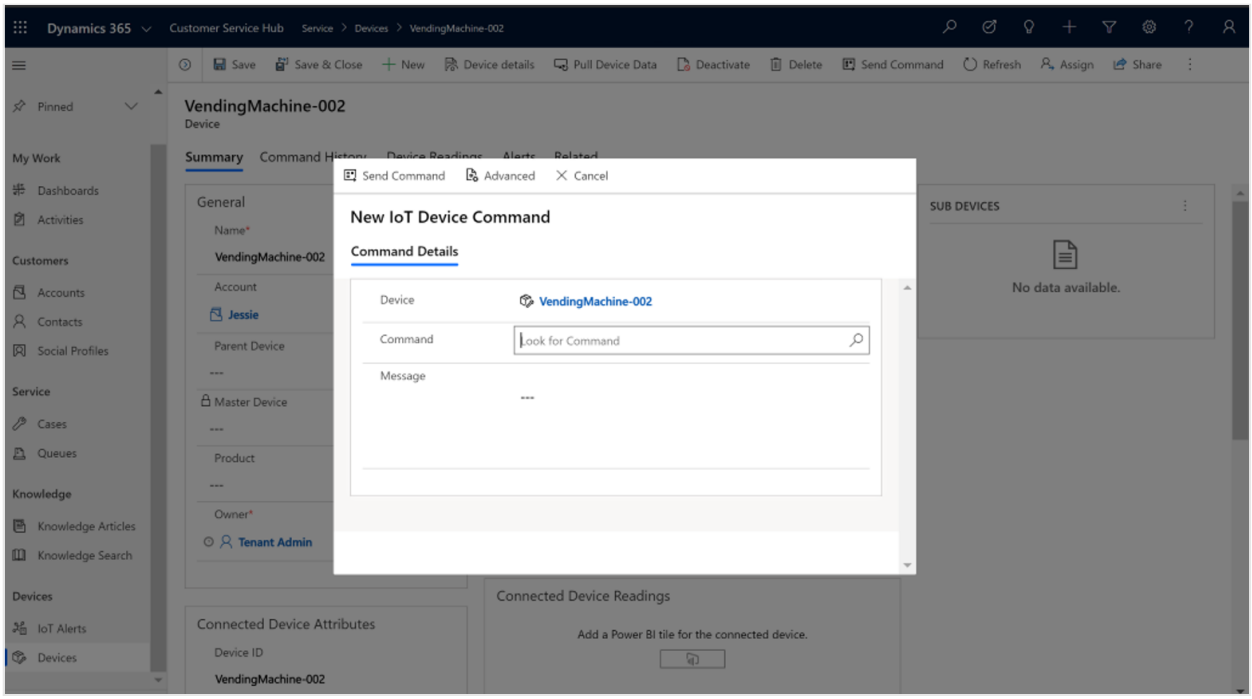
2. **View a customer's device alert history**: Agents can view a customer's device alert history by selecting the customer's account.



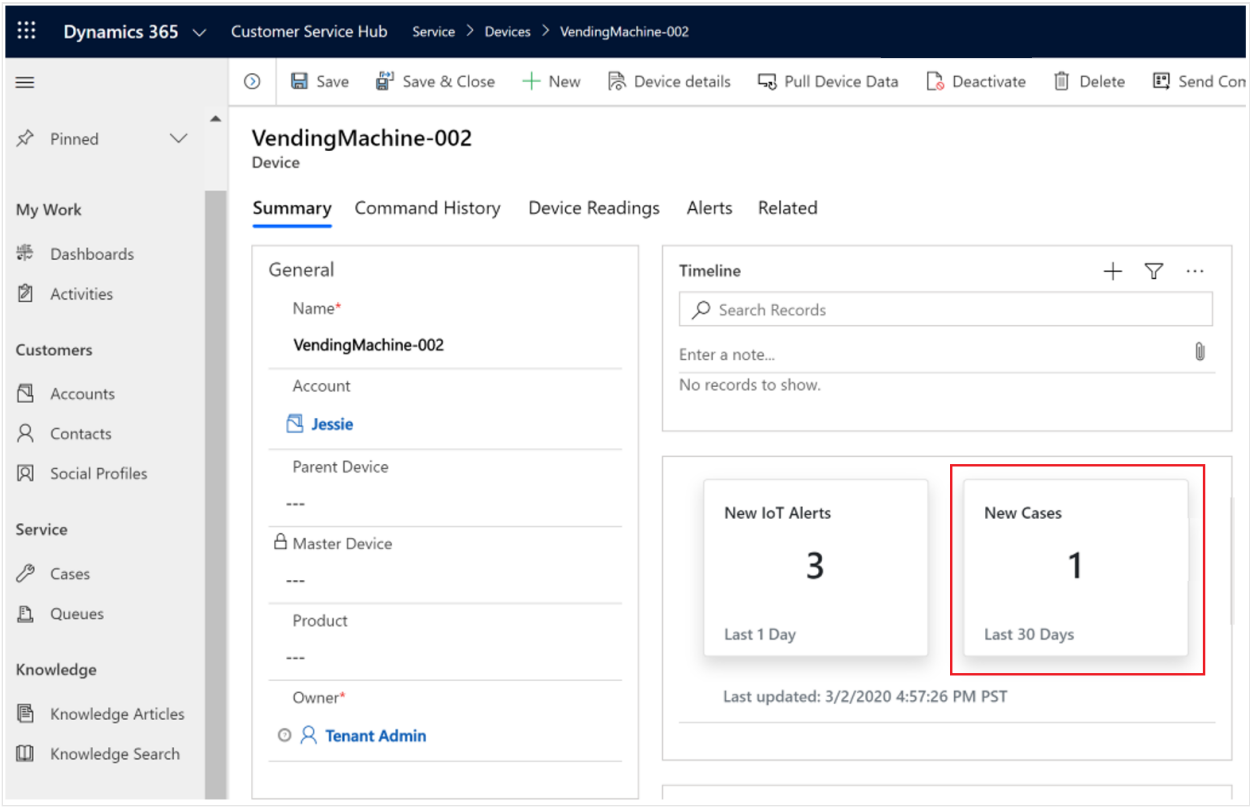
3. **Create a case with multiple devices**: Agents can create a case by selecting multiple devices.



4. **Send commands to IoT devices**: Agents can send commands to IoT devices.

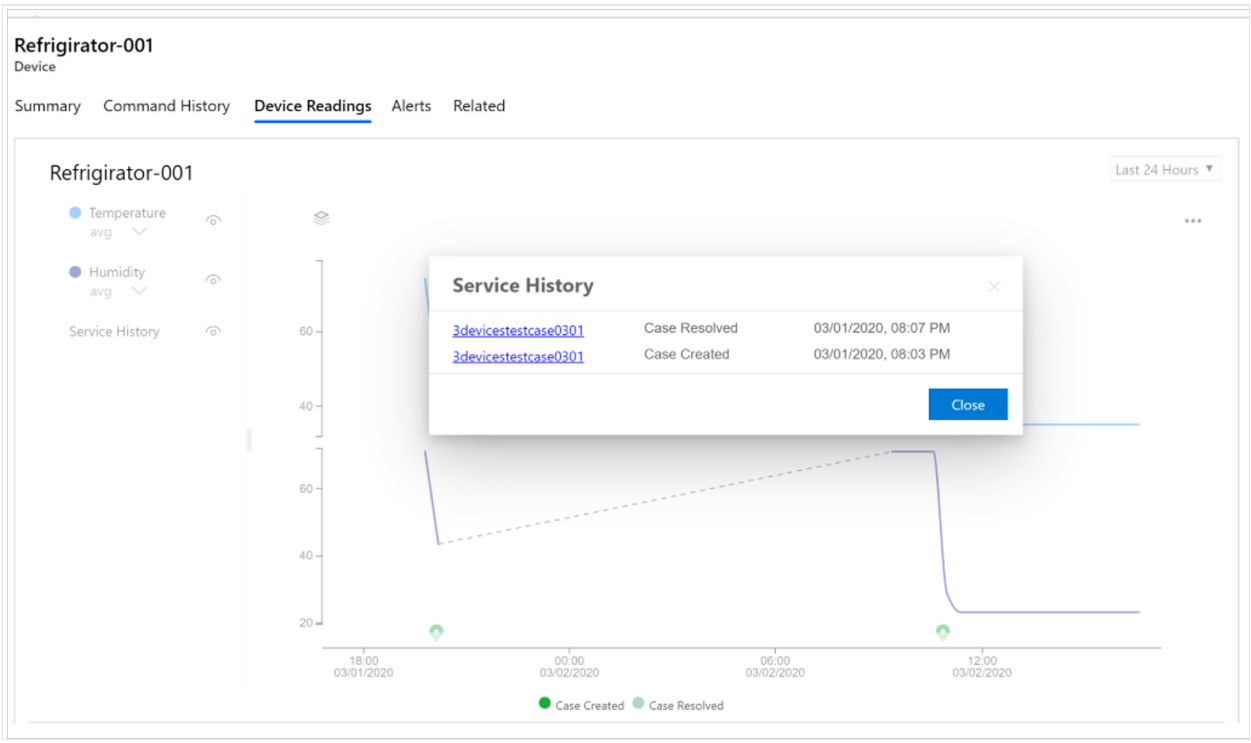


5. **View device history summaries**: Agents can view a device's history summary.



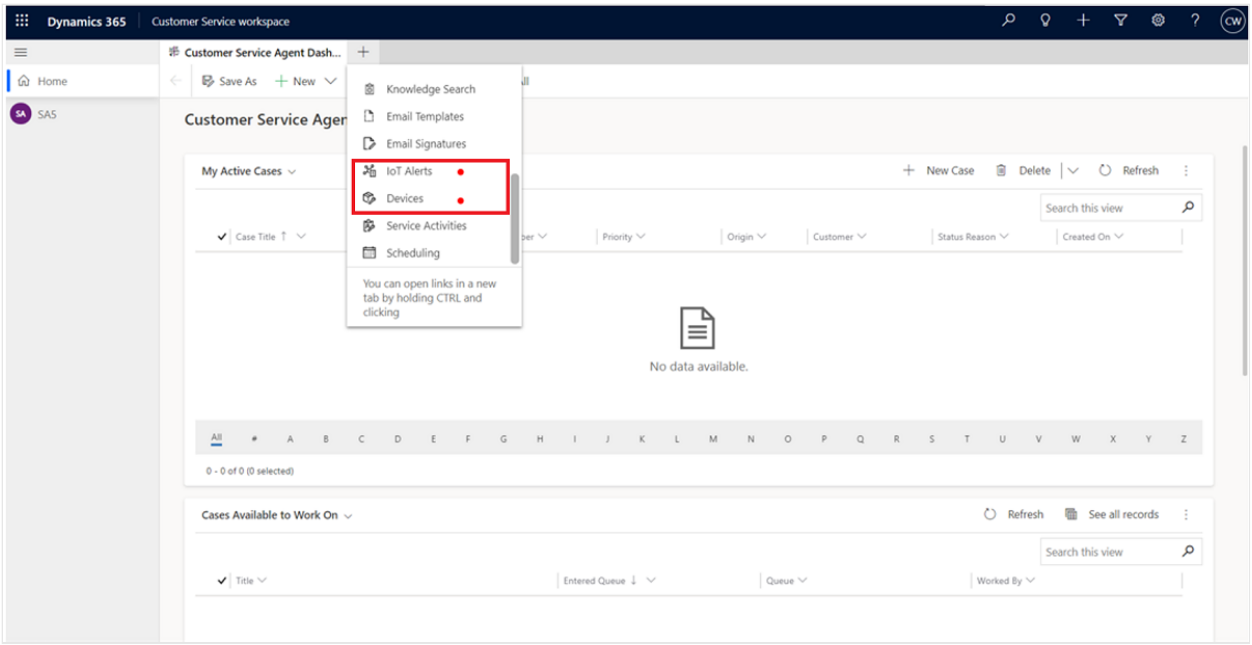
6. **Check real-time device readings**: Agents can check real-time device readings.

7. **View case histories on devices**: Agents can check a case history on a device.



Connected Customer Service in Customer Service workspace

The Connected Customer Service solution is available in Customer Service workspace:

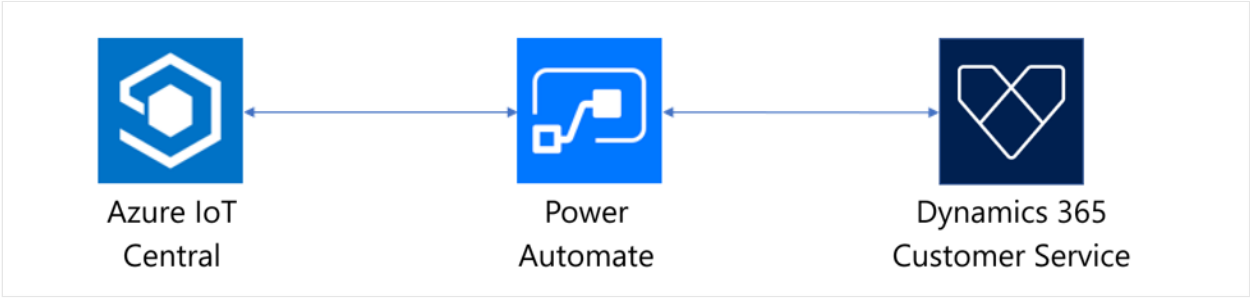

Dynamics 365
Customer Service workspace
Customer Service Agent Dash...
Home
SAS
Save As
New
Knowledge Search
Email Templates
Email Signatures
IoT Alerts
Devices
Service Activities
Scheduling
You can open links in a new tab by holding CTRL and clicking
Customer Service Ager
My Active Cases
New Case
Delete
Refresh
Search this view
Case Title
Priority
Origin
Customer
Status Reason
Created On
No data available.
All
0 - 0 of 0 (0 selected)
Cases Available to Work On
Refresh
See all records
Search this view
Title
Entered Queue
Queue
Worked By

Connected Customer Service for Azure IoT Central - Overview

Article • 01/15/2022

Connected Customer Service for Azure IoT Central provides a direct integration of Dynamics 365 Customer Service with Azure IoT Central, a fully managed IoT software-as-a-service (SaaS) solution.

Azure IoT Central enables builders to configure rules and actions. Based on those actions, IoT alerts will be created in Connected Customer Service. Also, based on service activities in Connected Customer Service, information can be sent back to Azure IoT Central. This is accomplished by using Power Automate, a SaaS offering for automating workflows across applications and services.



The below end-to-end integration processes can be easily implemented based on a pure configuration experience:

- Azure IoT Central can send information about device anomalies to Connected Customer Service (as an IoT Alert) for diagnosis
- Connected Customer Service can create cases or work orders triggered from device anomalies

Azure IoT Central requires no extensive cloud development or coding skills to get an IoT solution up and running.

With Power Automate templates, users can connect their accounts, take advantage of our pre-built templates, and customize their own flows in an easy visual designer without the need for coding experience.

Learn more about Azure IoT Central

- What is Azure IoT Central?
- Tour of Azure IoT Central user interface
- Create a new application in Azure IoT Central - tutorial

Prerequisites for setting up Connected Customer Service for Azure IoT Central

Article • 08/09/2022

Ready to connect Azure IoT Central to Connected Customer Service (CFS) using Power Automate to see how you can harness the power of the Internet of Things (IoT) and improve customer service (without writing any code)?

Before you take these tutorials, you need to complete three tasks:

- Provision the Azure IoT Central solution using the sample Legacy template.
- Get a Dynamics 365 Customer Service tenant with system administrator credentials.
- Install the Dynamics 365 Connected Customer Service add-on from the Dynamics 365 admin center.

This topic provides you with links to everything you need and walks you through the steps to get started.

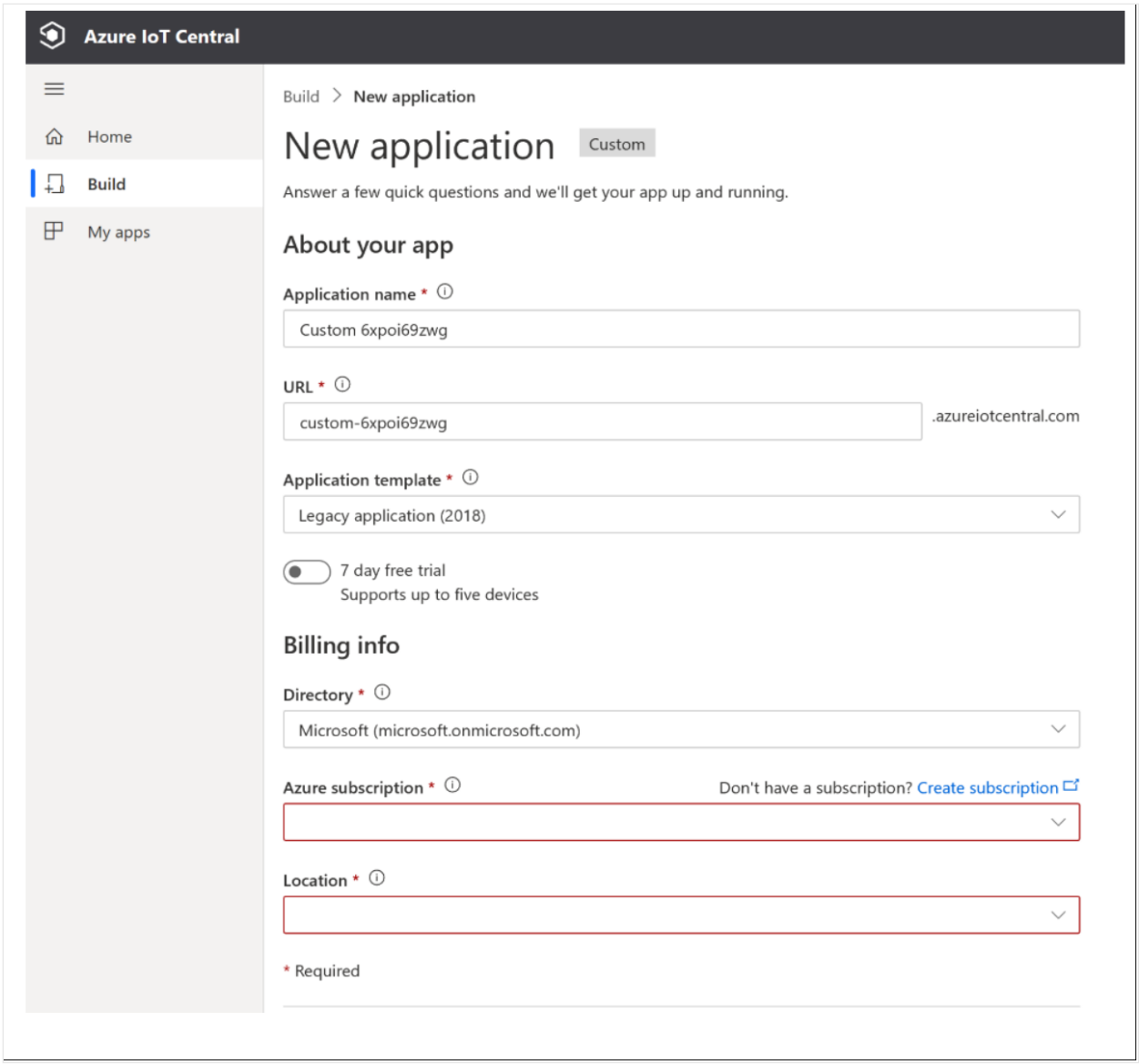
Provision the Azure IoT Central solution using the Legacy template

The various industry templates for retail, energy, government, and healthcare contain device templates that you can use for testing purposes.

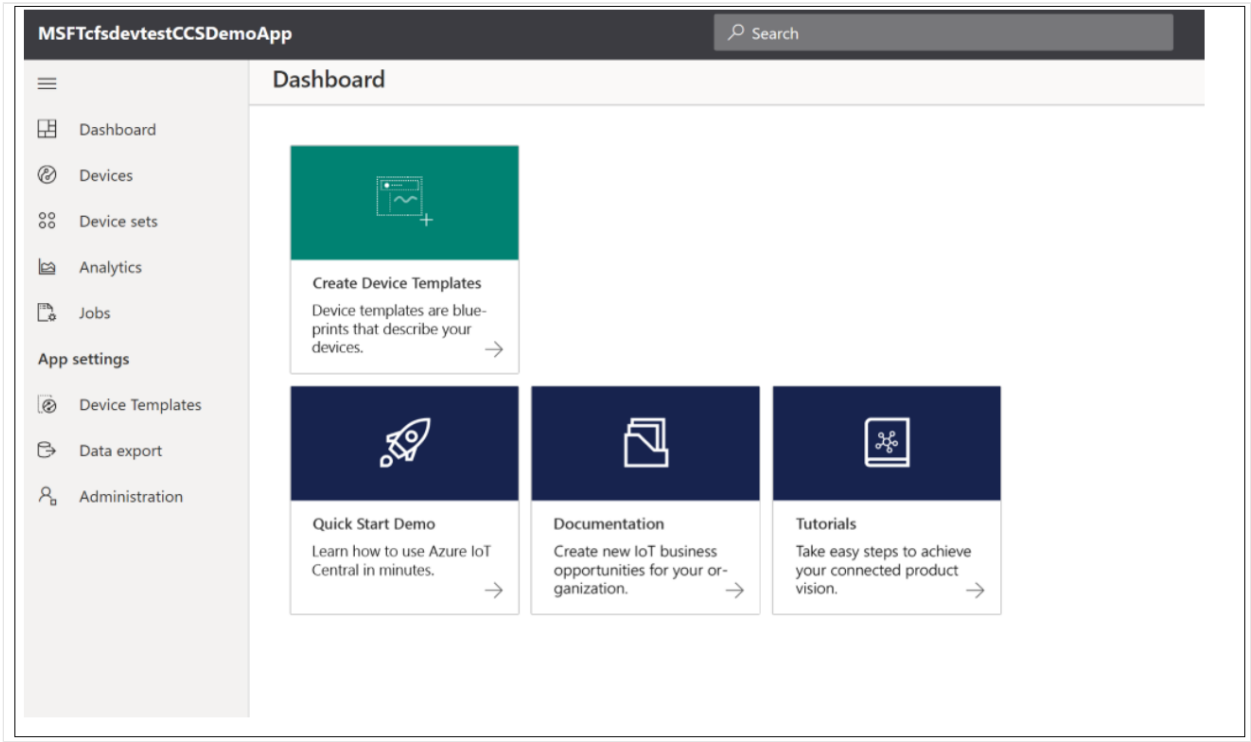
First, navigate to Azure IoT Central. To start creating your new Azure IoT Central application, select **Create Custom App**.

On the **Create Custom App** dialog:

1. Select the Preview or Legacy template of your choosing (recommended for demo) or create a custom app to start from scratch.
2. Then select **Create**.



After a few seconds, you'll see the App home page.



Get a Dynamics 365 Customer Service tenant with system administrator credentials

You'll need a Dynamics 365 Customer Service tenant that you can connect your IoT solution to.

New to Customer Service and need a tenant? No worries. Sign up for a free trial for development purposes.

1 - Receive IoT alerts in Connected Customer Service from Azure IoT Central

Article • 01/26/2022

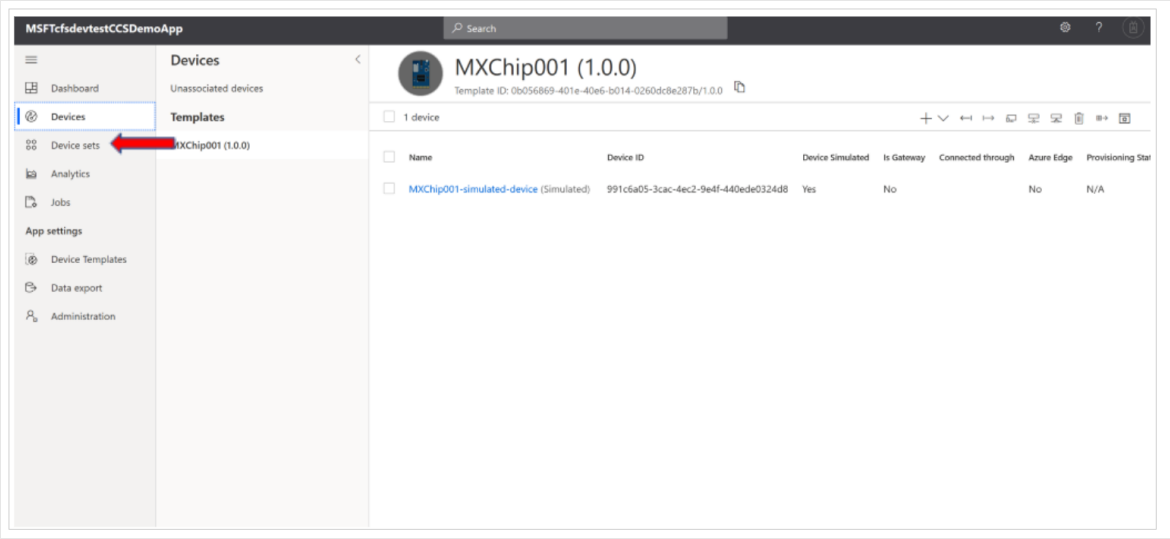
At the end of this step in the tutorial, you'll be able to receive and see alerts from Azure IoT Central in your instance of Connected Customer Service. IoT alerts will display on your dashboard and relate to relevant work orders that have been created automatically.

Goal

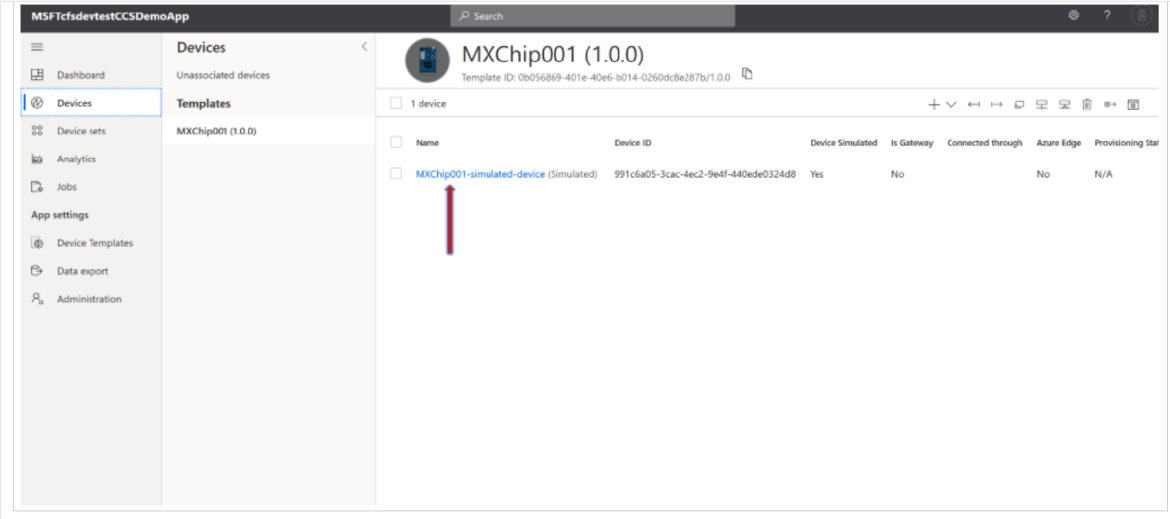
Connect Azure IoT Central to Connected Customer Service by configuring the "Create Connected Service alerts from IoT Central" template in Power Automate.

Steps

1. Sign in to your Azure IoT Central application and navigate to **Devices**.

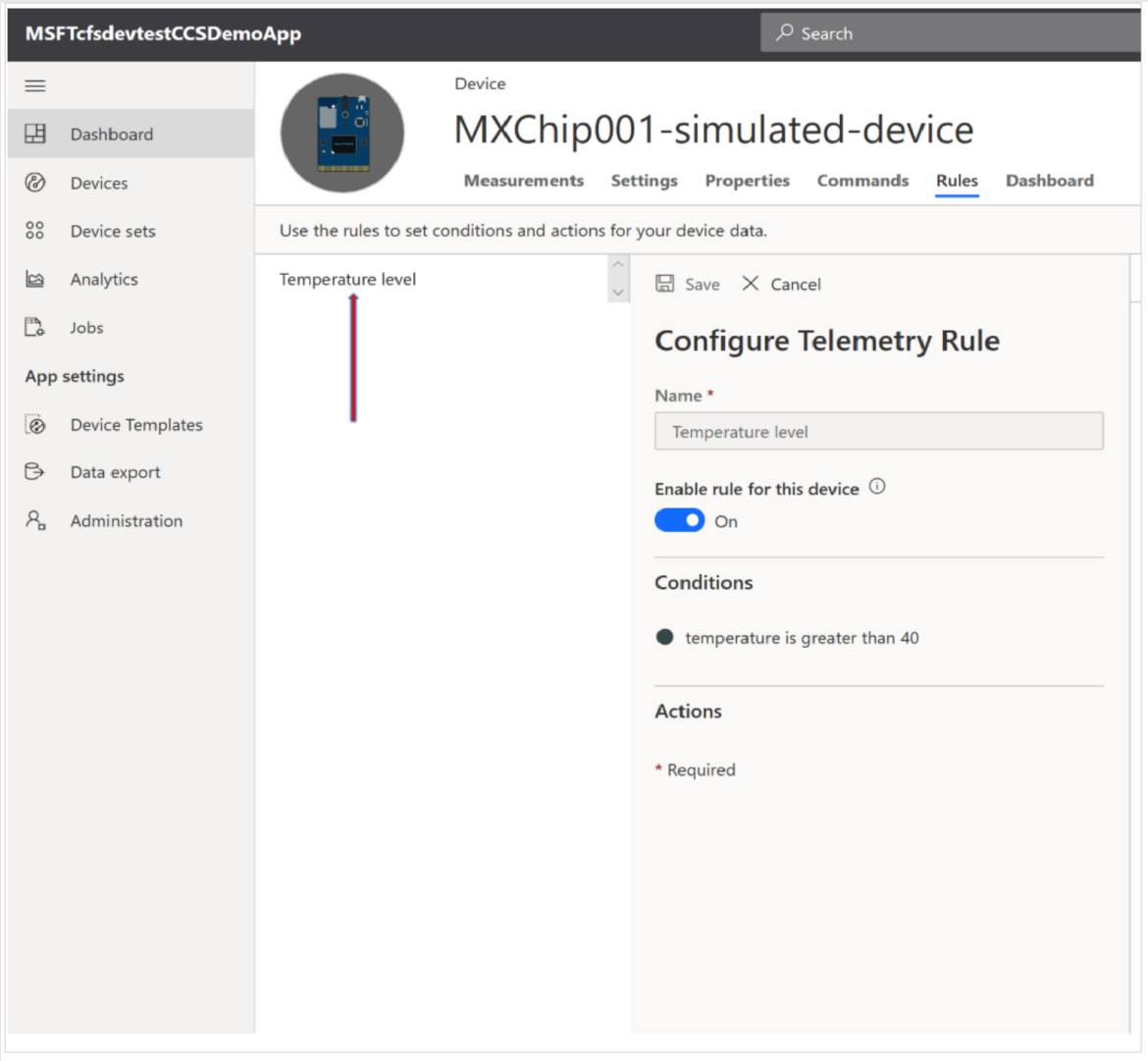


2. From the list of devices, select **MXChip001**.

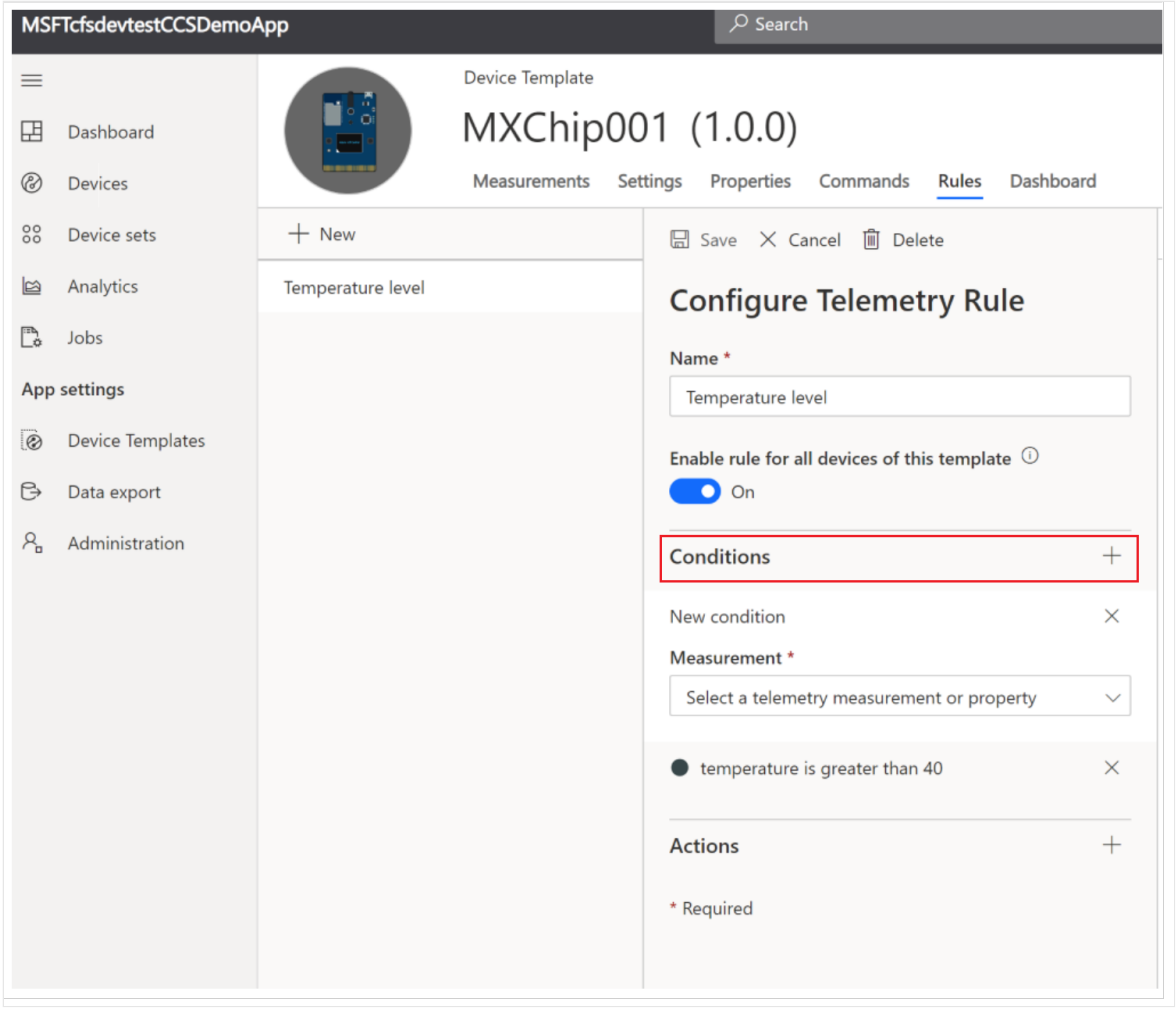


The MXChip001 detail page is displayed.

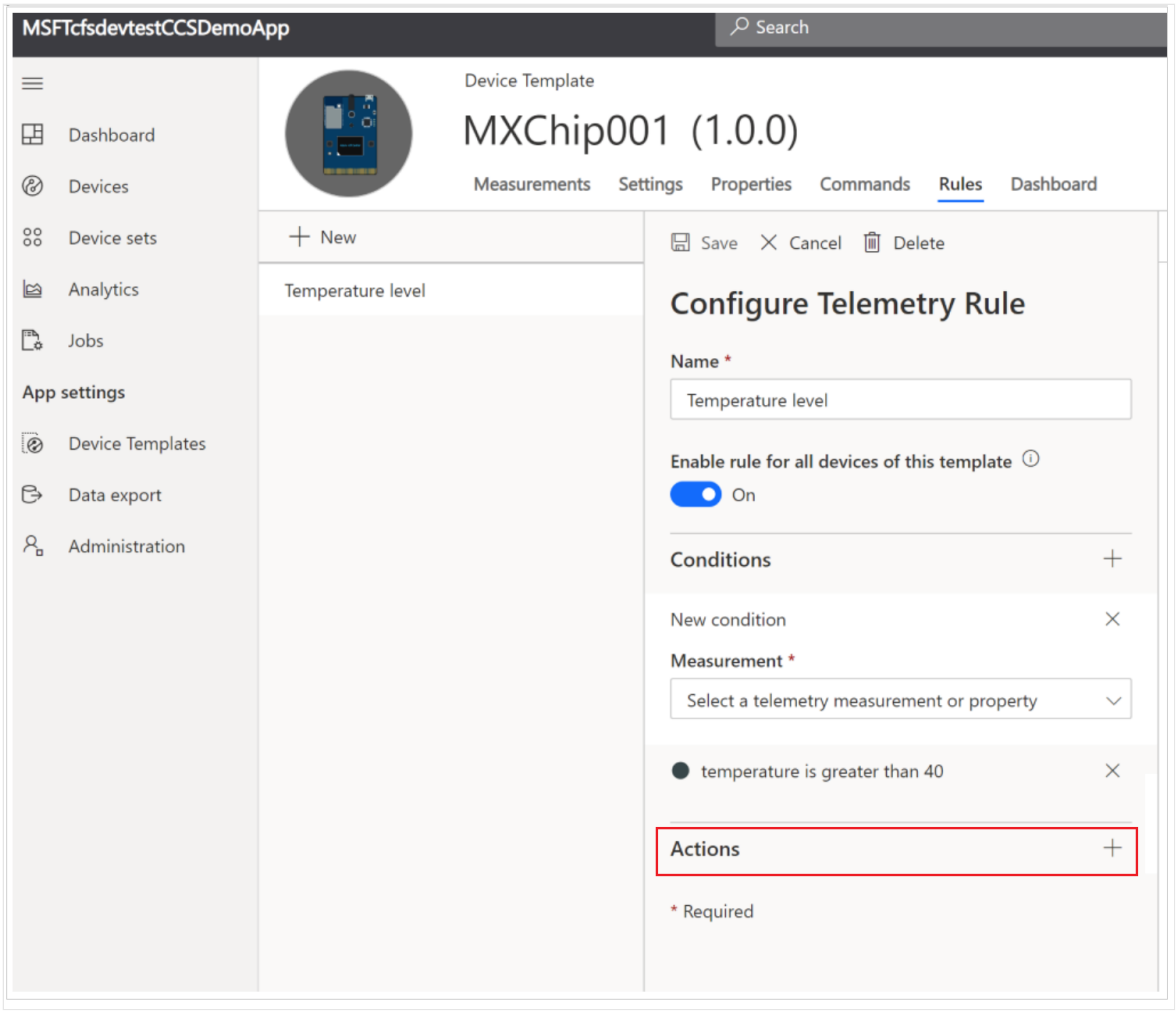
3. Select the **Rules** tab, and then create the rule, **Temperature level**. More information: IoT Central tutorial.

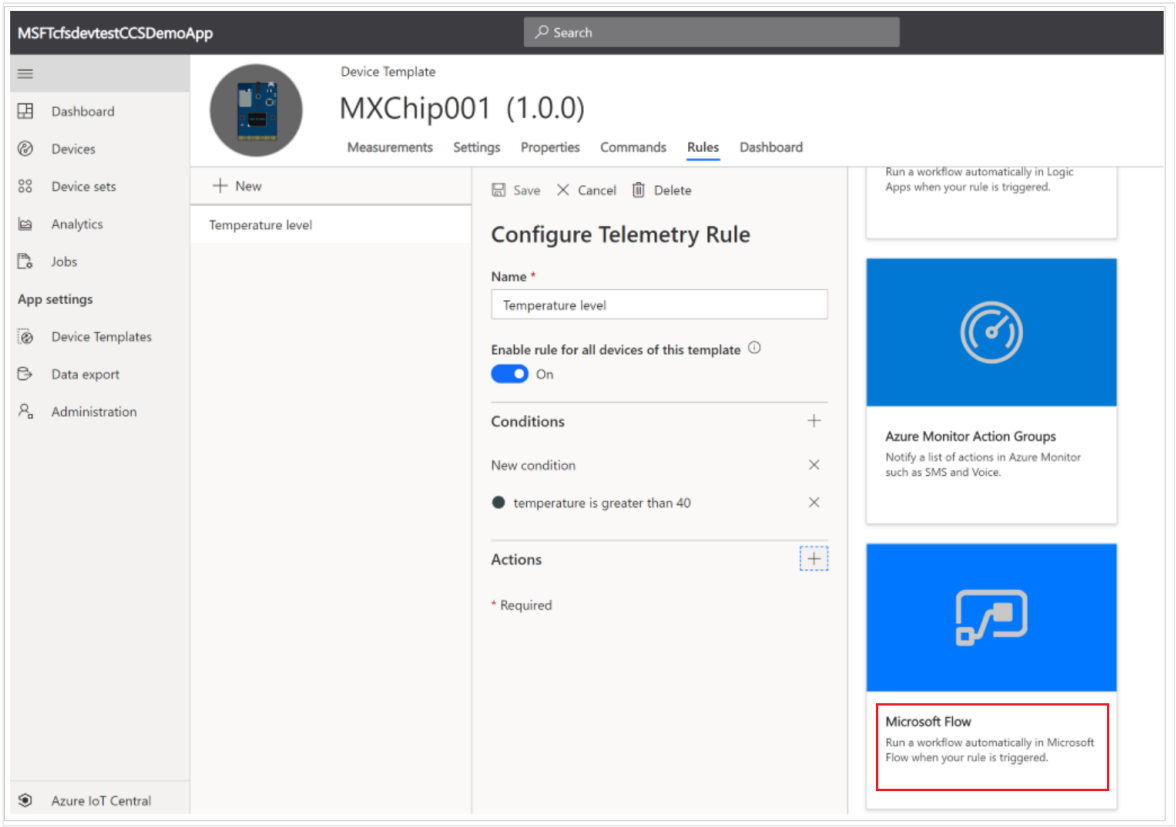


4. Select the plus sign (+) next to **Conditions** to set up the alert trigger threshold.



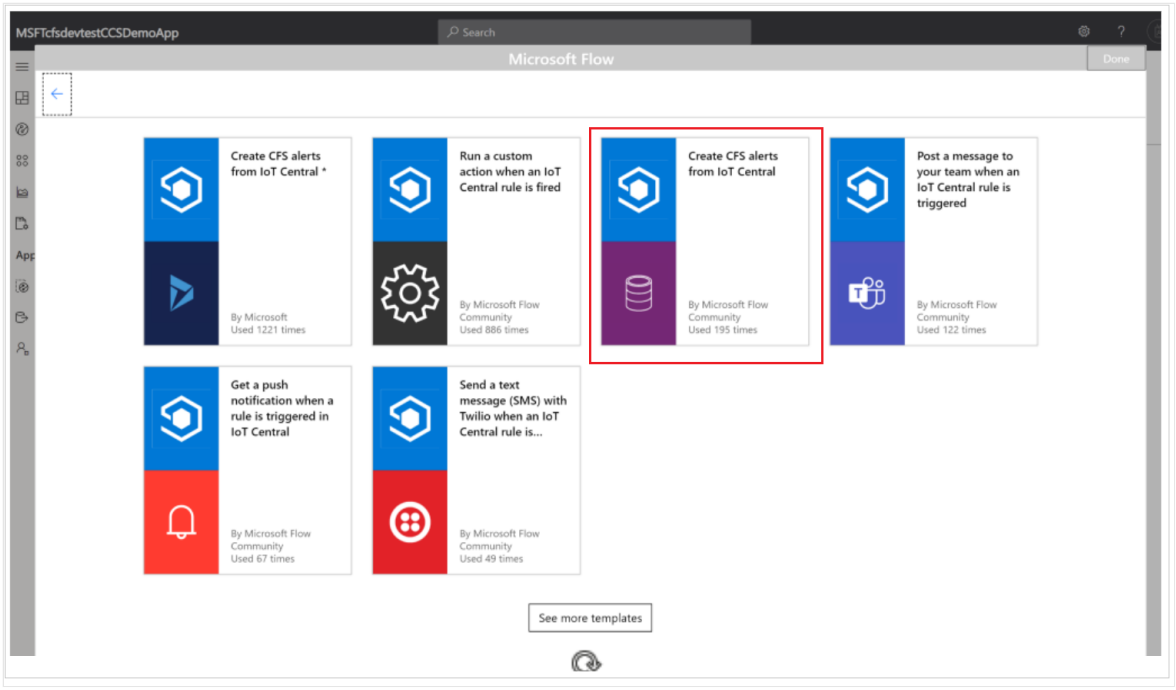
5. Select the plus sign (+) next to **Actions**, and then select **Microsoft Flow**. This is where you'll set up your integrations.

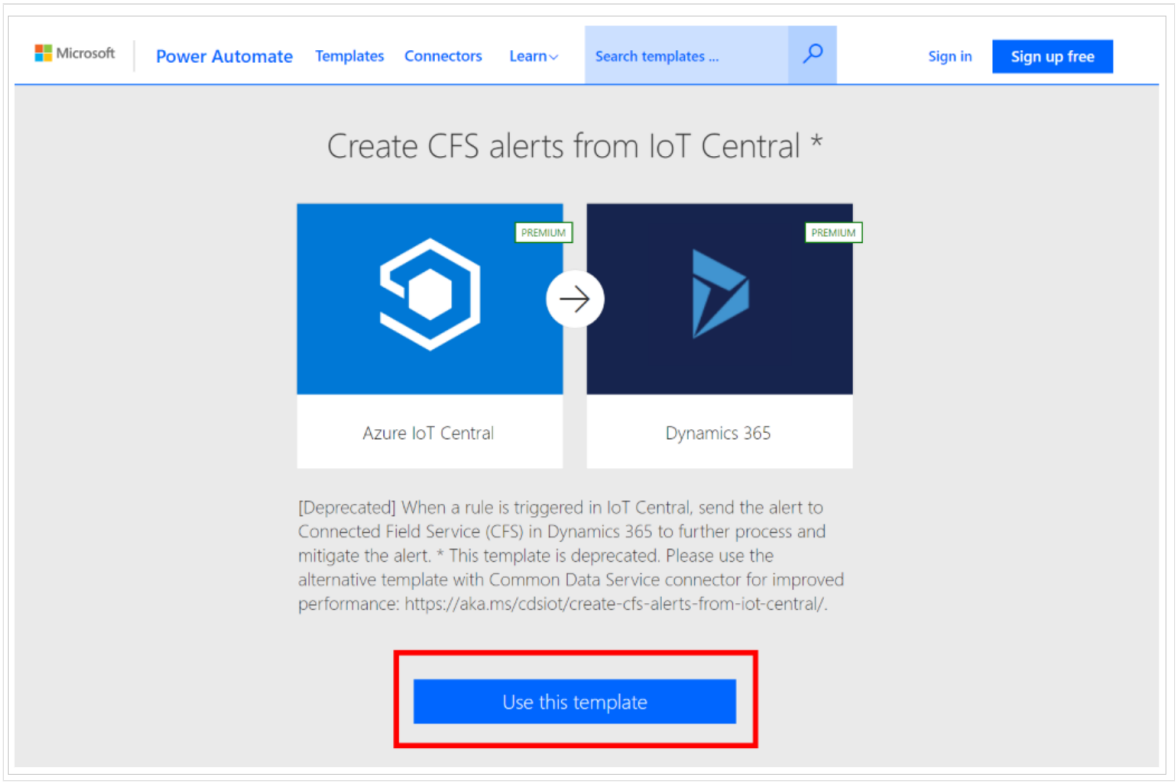




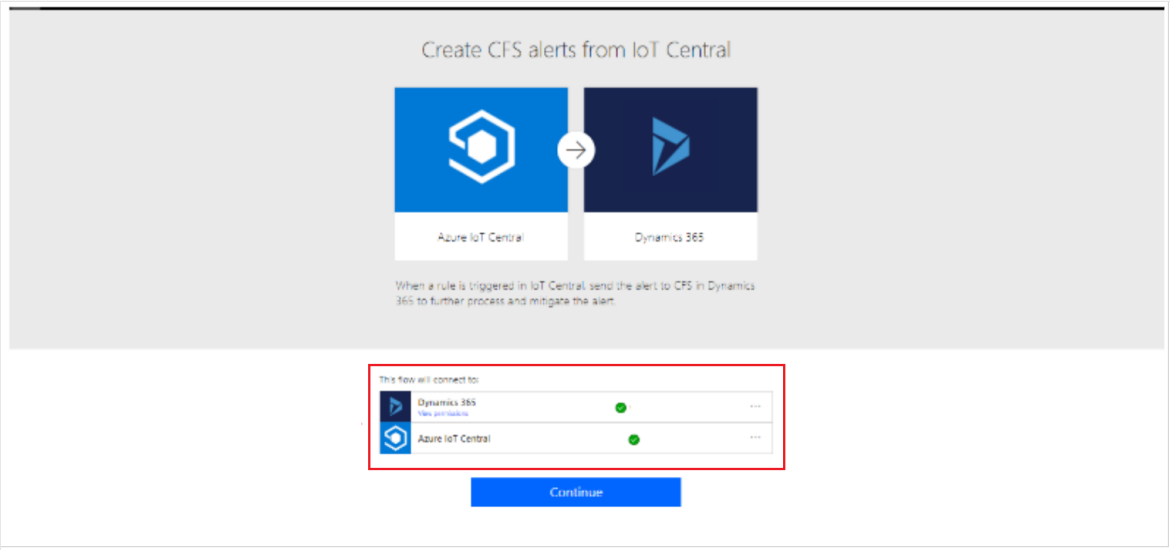
The Power Automate template page for **Create Connected Service alerts from IoT Central** is displayed.

6. Select **Use this template**. (If you can't find these templates, go to the Power Automate Templates page and search for "CDS").





7. You'll be prompted to sign in to both IoT Central and Dynamics 365 accounts. Select your accounts from each, and then select **Continue**.



Now you'll see the actual flow.

8. Because this is a template, you only need to take the following actions:

   a. Select your Azure IoT Central application name.

   b. Set **IoT rule** as the one you created earlier. In our suggested example, it would be: "Temperature level".

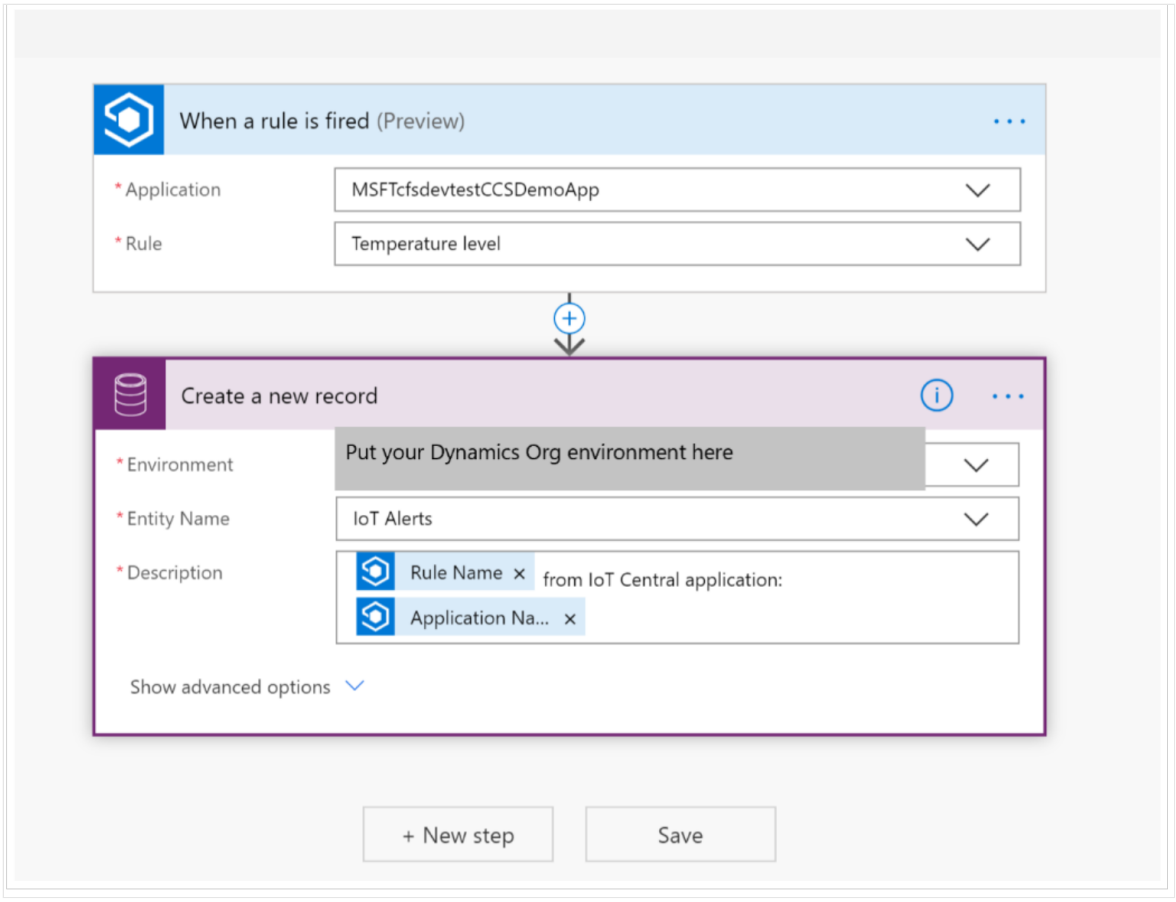
   c. Select your Dynamics 365 organization name.

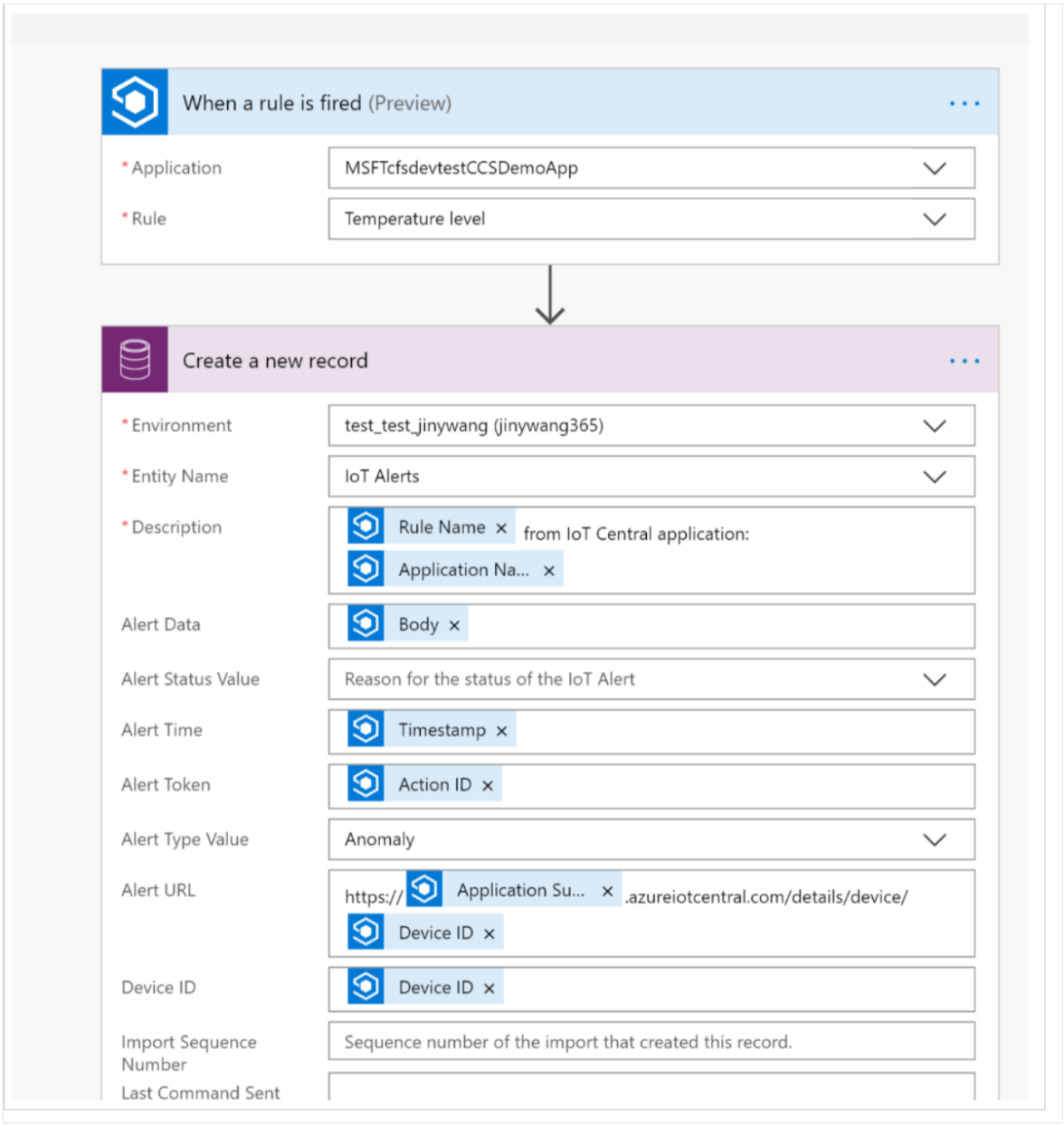
   d. Set **Entity Name** to **IoT Alerts.**

   e. Select **Show advanced options** to reveal several hidden customers.

   f. Set **Alert Type Value** to **Anomaly**.

   g. Save the flow.

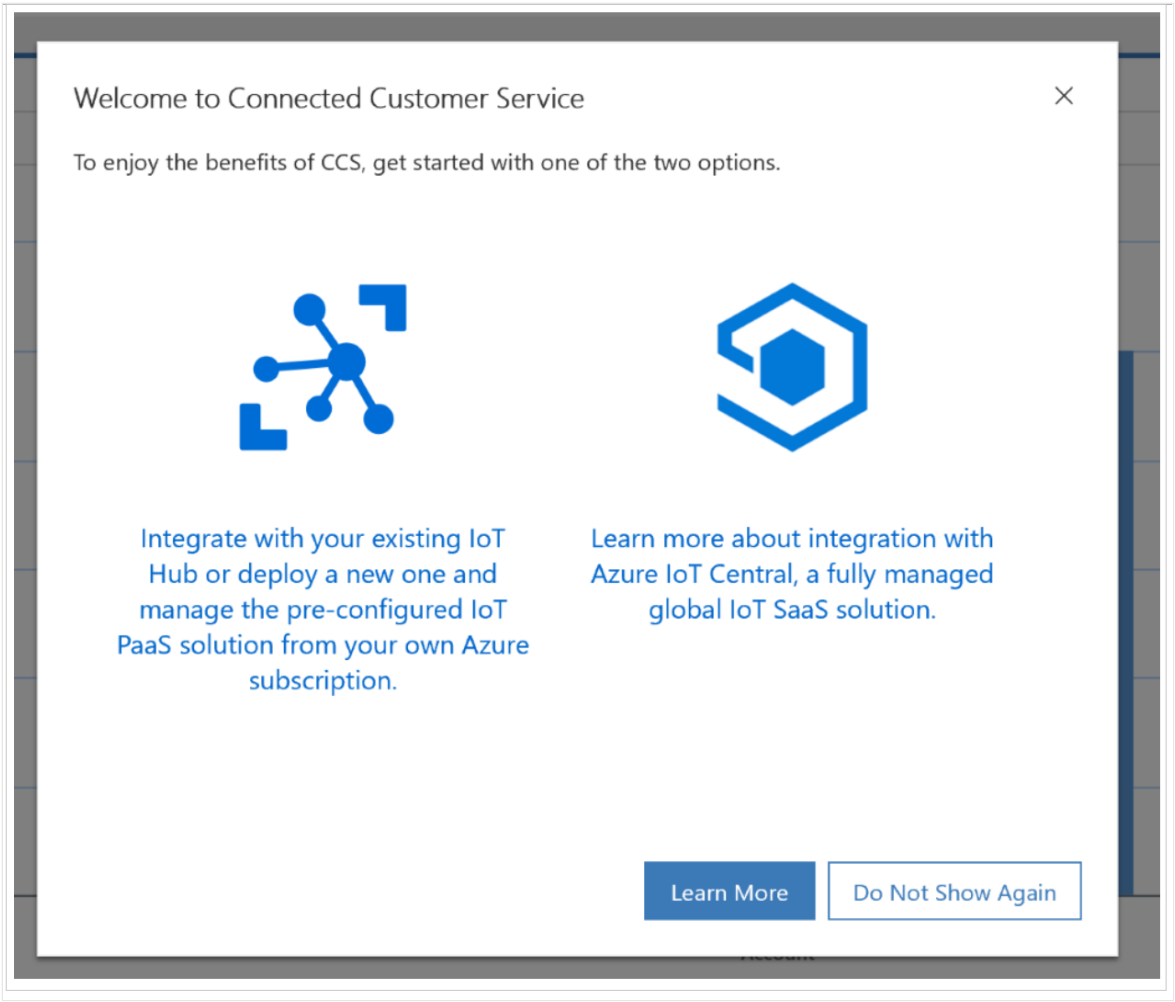

When a rule is fired (Preview)
* Application
MSFTcfsdevtestCCSDemoApp
* Rule
Temperature level
Create a new record
* Environment
Put your Dynamics Org environment here
* Entity Name
IoT Alerts
* Description
Rule Name
from IoT Central application:
Application Na...
Show advanced options
+ New step
Save



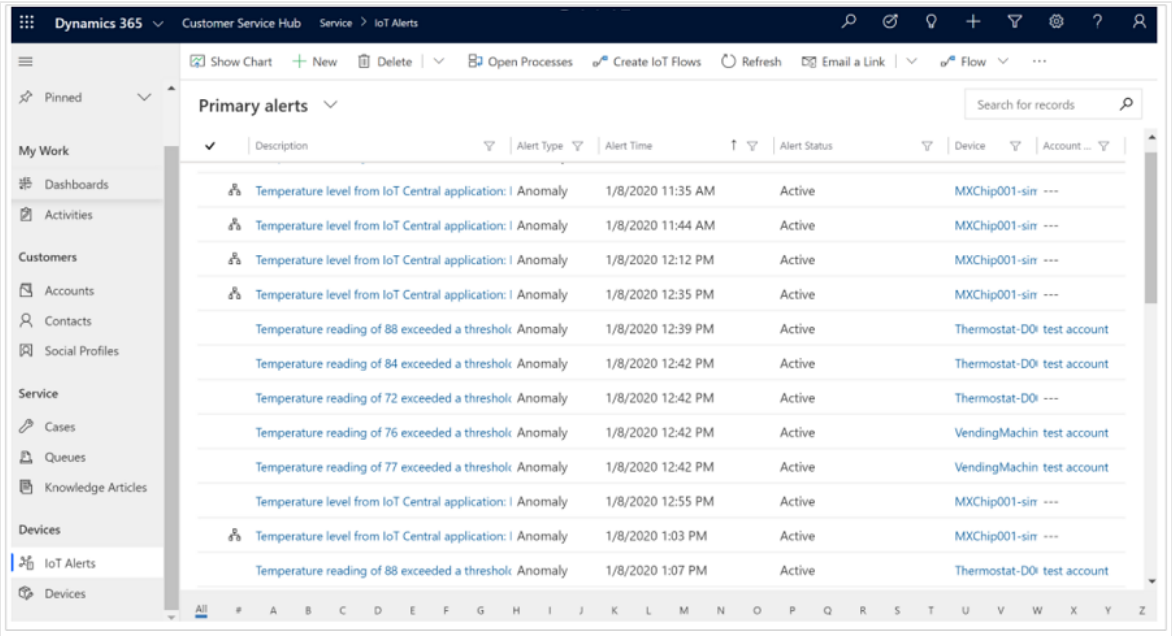
From here, the workflow will trigger based on the alert type.

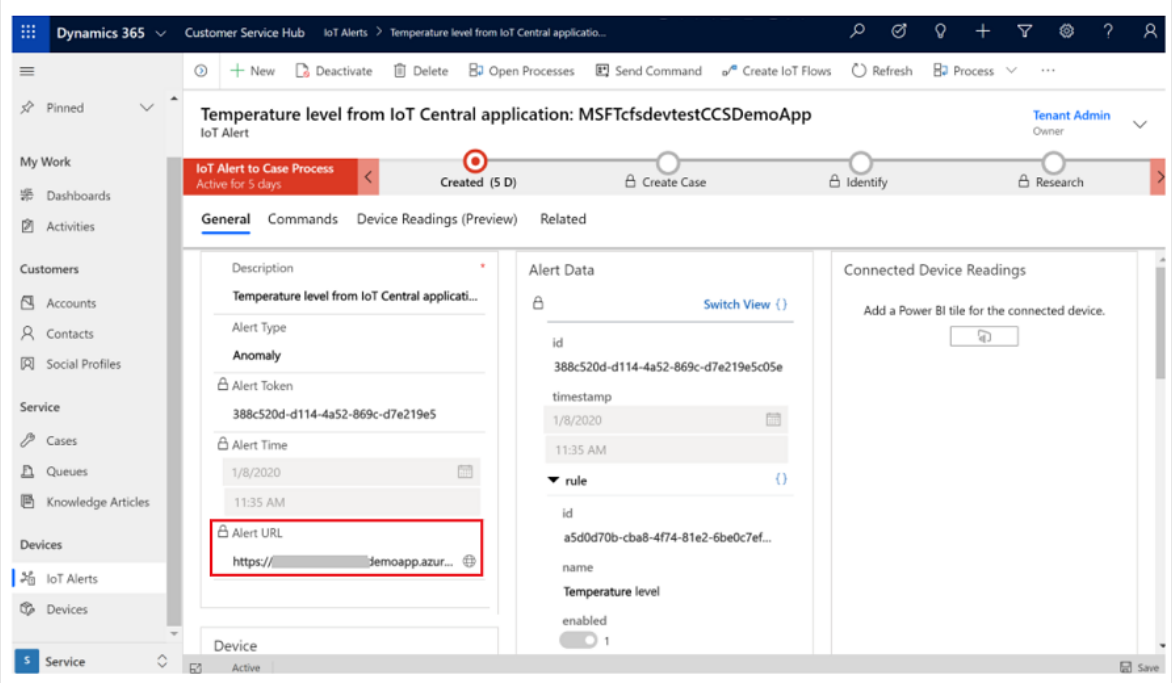
See the results

1. After you've saved your flow, sign in to Dynamics 365 Customer Service, and then select **Connected Customer Service**. You might see a window that offers a few links to learn more about Connected Customer Service and Azure IoT offerings. You can choose to learn more, or just dismiss this window.



2. In Connected Customer Service, you should now see incoming alerts from Azure IoT Central on the dashboard. You can select one of these alerts to see more details, including device information, threshold, and the violated rules. You can also select the IoT Central alert URL that will take you back to IoT Central.





See also

Prerequisites for setting up Connected Customer Service for Azure IoT Central

Associate devices with customer accounts in Connected Customer Service

2 - Associate devices with customer accounts in Connected Customer Service

Article • 01/26/2022

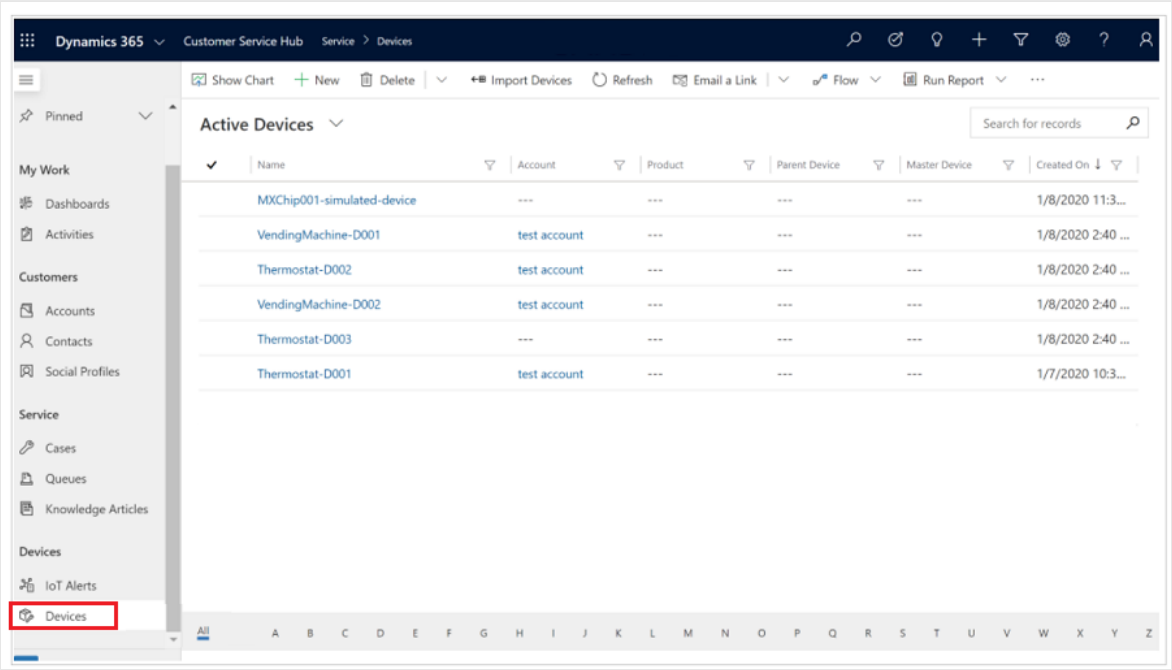
If an IoT device isn't associated with a customer account in Connected Customer Service, the system won't be able to generate work orders or cases for incoming alerts. In this tutorial, we'll walk through how to associate a device with a customer account. While customer accounts are an optional association in Azure IoT Central, they're required in Connected Customer Service.

Goal

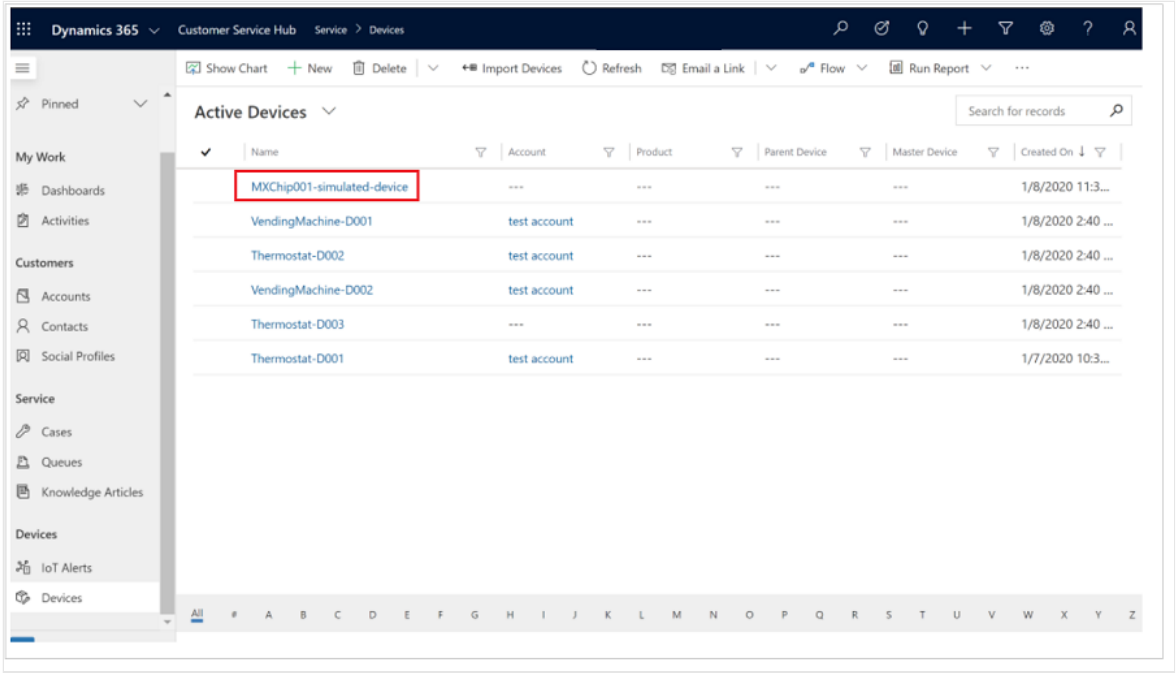
Associate a device in Connected Customer Service with a customer account so that work orders or cases can be generated against incoming IoT alerts.

Steps

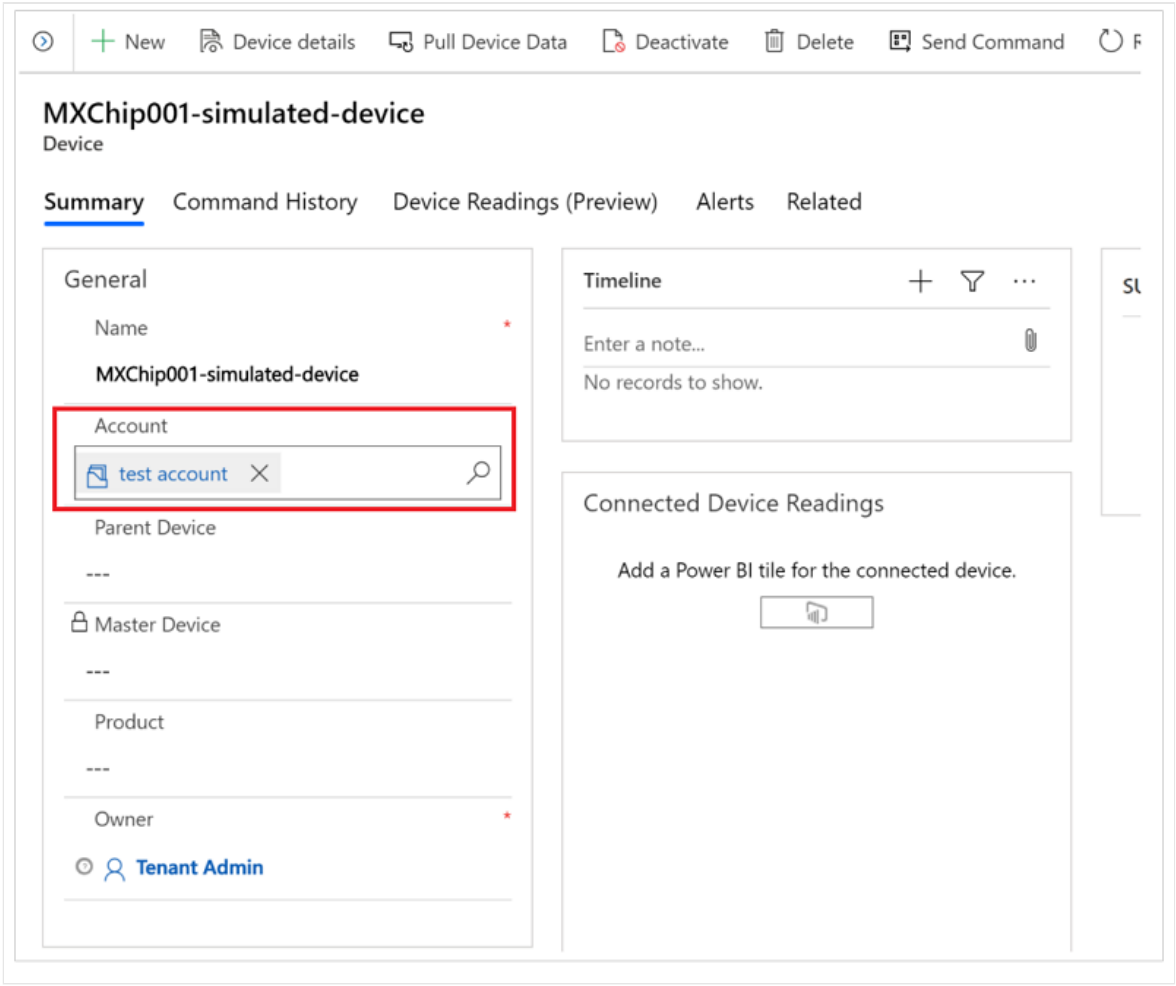
1. In your Connected Customer Service application, select **Devices** from the left pane.



2. On the **Active Devices** page, select one of the devices that doesn't have an account already associated with it.



3. On the device detail page, start typing the name of the customer account in the **Account** field.



4. Save the changes.

See the results

This device will now be associated with a customer account, and can receive IoT alerts from Azure IoT Central.

See also

Prerequisites for setting up Connected Customer Service for Azure IoT Central
Receive IoT alerts in Connected Customer Service from Azure IoT Central

Develop customized IoT solutions in Connected Customer Service

Article • 08/09/2022

Connected Customer Service for Dynamics 365 integrates Internet of Things (IoT) devices with Dynamics 365 for Customer Engagement to enable their registration, monitoring and management into established business processes. This guide explains the component architecture, supplied interfaces and customization points, and explains the approach to develop customized IoT solutions.

The initial release of Connected Customer Service supports the following two primary development scenarios:

- Extend Connected Customer Service for Dynamics 365 so that manufacturers and hardware service organizations can register, monitor, and manage—including controlling and correcting—IoT devices. Future releases will provide additional support for predicative and prescriptive maintenance capabilities.
- Provide an IoT Platform that ISVs and partners can build on to IOT-enable their Dynamics 365 for Customer Engagement custom entities and managed solutions.

To enable the first scenario, the following capabilities are supported:

- Abstract device registration in an action, so that devices can be easily registered using the CRM web client or the mobile client
- Enable any CRM entity to be IOT-enabled, enabling straightforward IoT integration within existing business processes by using Connection entities
- Receive service alerts and automating their response with a customized workflow
- Send remote commands to IoT devices, for example after diagnosing a problem to correct a malfunctioning device
- Analyze incoming device data, and displaying aggregate, trend and other metrics in custom dashboards

Architecture of Connected Customer Service with IoT Hub

Article • 07/07/2021

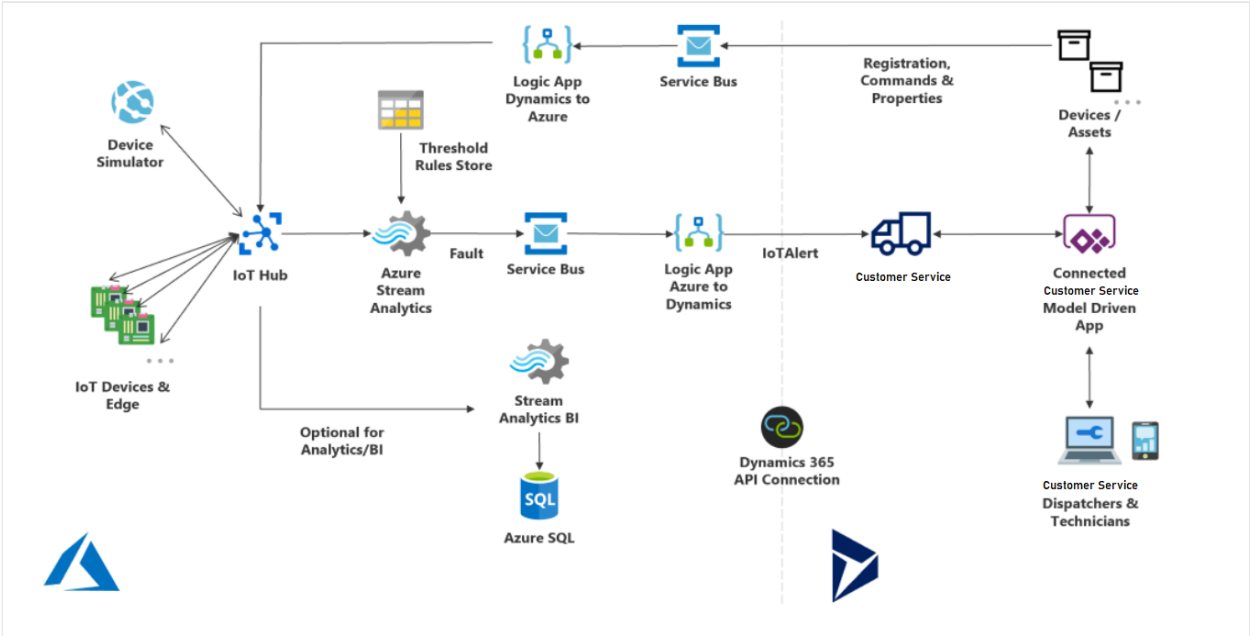
Connected Customer Service with IoT Hub brings together Azure IoT and Dynamics 365 Customer Service. In this topic, you will find an explanation of the architecture and how it all works together.

Prerequisites

To understand what's covered in this topic, you need to know that Connected Customer Service (CCS) refers to a set of solutions, entities, and processes built inside the Dynamics 365 Customer Service Hub app. As of Customer Service Hub 9.0.20034.20XX, CCS is included as part of Customer Service.

For this topic, the words **data** and **telemetry** refer to information sent from an IoT device to the cloud. The words **devices** and **sensors** refer to Internet-connected things like thermometers, gyroscopes, magnetometers, pressure readers, and more that take specific measurements. An **asset** is a piece of equipment that can have one or more sensors connected to it.

Architecture



- **IoT Devices & Edge**: Internet-connected sensors on equipment send data to IoT Hub typically via WiFi or cellular connectivity. A single piece of equipment can have

multiple sensors, each taking different measurements such as temperature and pressure. If a building or area has a collection of equipment each with multiple sensors, then an **Edge device** can be used to organize them and broker telemetry sent to IoT Hub.

- **Device Simulator**: Administrators can simulate devices and telemetry for testing and development purposes before the hardware is set up. This lets them see how simulated alerts flow to Dynamics 365 Customer Service and create work orders.
- **IoT Hub**: The gateway to the cloud, capable of ingesting data on a large scale. IoT Hub is a collection of applications and processes tailored to connected device scenarios that are also customizable. Deploying IoT Hub will deploy a resource group with this collection of applications and processes.
- **Azure Stream Analytics**: Queries device data as it enters IoT Hub. Data only passes through and is not stored.
- **Threshold Rules Store**: Helps decide if device data is abnormal and beyond acceptable boundaries. Abnormal data is characterized as a **Fault**.
- **Service Bus**: Takes faults and enters them into a queue to systematically keep track of them. The queue is helpful for scenarios where faults fail to get transferred to Dynamics 365 and should be attempted again after some time.
- **Stream Analytics & Azure SQL**: Used to store device data for longer time periods to perform data analysis. For example, this would be an option for organizations interested in analyzing large amounts of historical data to predict device failures in the future. This generally incurs a greater Azure cost.
- **Logic App Azure to Dynamics**: Connects Azure with Dynamics 365 (and other applications and platforms). Serves as a way to apply more logic, map entities, and trigger the appropriate actions in Dynamics 365, such as the creation of an **IoT Alert** record. Compare this to IoT Central, which uses Power Automate.
- **IoT Alert**: Faults are passed from IoT Hub to Dynamics 365 in the form of IoT alerts, which is an entity in Customer Service. An IoT alert is the first part of the process inside Dynamics 365. An IoT alert is a subset of all device data that requires attention and potentially an action from the customer service or customer service department.
- **Connected Customer Service Model Driven App**: A set of entities and processes built on Dynamics 365 Customer Service. Among other things, Connected Customer Service allows you to connect IoT devices (sensors) with Customer Service customer assets.

- **Customer Service Agent**: The end users of Connected Customer Service who interact with IoT alerts and cases, on their phones, tablets, and computers.
- **Devices**: Entities in Connected Customer Service in Dynamics 365 that help you manage the sensors and equipment that your organization manages.
- **Registration, Commands & Properties**: Processes used in Connected Customer Service to interact with and send data back to IoT Hub and finally to the device, making CCS a bi-directional solution. For example, commands allow you to execute actions on devices such as reboot. Another example is to display a message on the device for someone to view..
- **Logic App Dynamics to Azure**: The reverse of the previously explained Logic App, this adds detail to data and actions that need to be sent to IoT Hub from Dynamics. IoT Hub will then send the data or action to the connected device.

Component data flow diagram

A data flow between the Azure IoT Hub and Connected Customer Service components is detailed in this downloadable diagram. It details each information flow, its flow direction and relative order for a standard installation of Connected Customer Service for Dynamics 365.

Quickstart: Build your own Connected Customer Service (IoT) solution

Article • 06/28/2022

This article shows you how to get up and running quickly to build your own Connected Customer Service solution that integrates IoT data with Dynamics 365 Customer Service.

What is Connected Customer Service?

Connected Customer Service enables businesses to actively look for issues with customers' devices through IoT signals and proactively resolve those issues, simultaneously increasing customer satisfaction and reducing assisted support service costs.

What you need to get started

Here are the 3 things you need to get started building your own IoT solution:

- **Dynamics 365 Customer Service with system administrator credentials**

  You'll need a Dynamics 365 Customer Service tenant so that you can import your IoT solution on top of it. You'll build an IoT app within that Customer Service tenant.

  New to Customer Service and need a tenant? No worries. Sign up for a free trial for development purposes.

- **Azure subscription with admin credentials**

  The Azure IoT services you'll deploy need to be associated with an Azure subscription.

  New to IoT and need an Azure subscription? We've got you covered. Sign up for an Azure free trial.

- **Dynamics 365 Connected Customer Service add-on**

  The free Connected Customer Service add-on automatically provisions a number of Azure IoT services with predefined demo data seamlessly on top of Dynamics 365 Customer Service. The add-on comes with demo data that enables you to see

the capabilities IoT data brings to Customer Service, including command modeling, customer asset to device mapping, IoT alert – to – case workflow, and more.

Documentation resources

Learn about Azure IoT extensibility, analytics, and more

See a component architecture diagram and learn which Azure IoT resources are included in a standard installation

Check out more Azure documentation resources

Azure subscription prerequisites for Connected Customer Service with IoTHub

Article • 08/31/2023

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

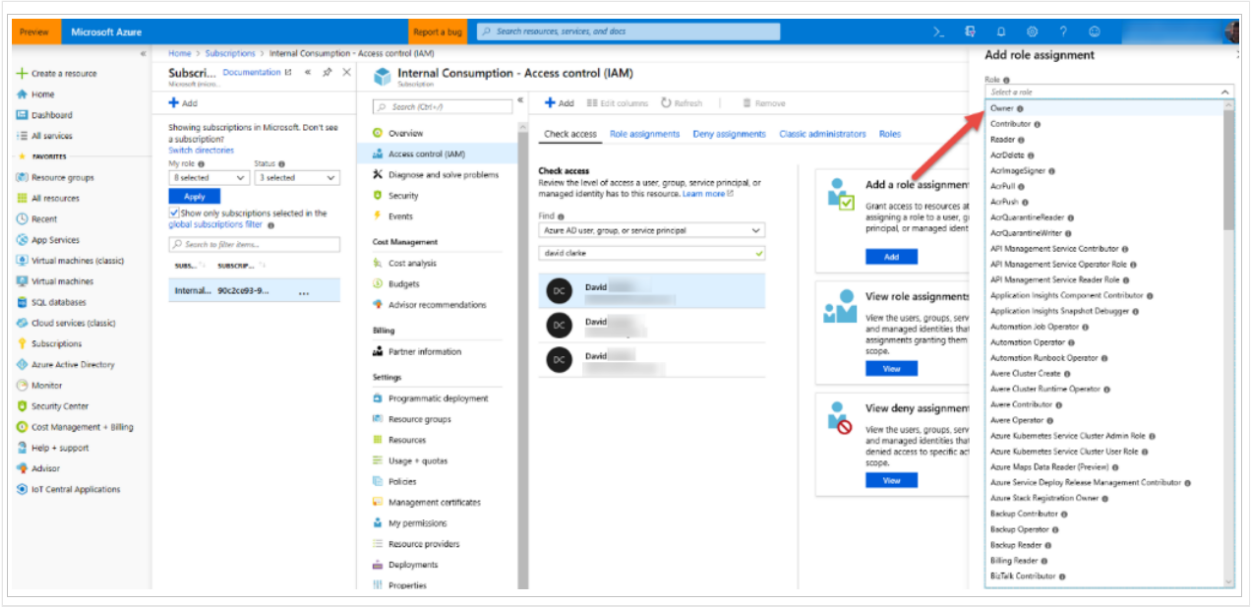
When you're deploying and administering Connected Customer Service with IoTHub, you must make sure of the considerations and prerequisites for your Azure subscription.

Prerequisites

1. You can deploy and administer Connected Customer Service with IoTHub in one Azure tenant only, which should be the home (first) Azure tenant tied to your credentials.

2. To deploy and administer IotHub, you must have one of the following Azure security roles:

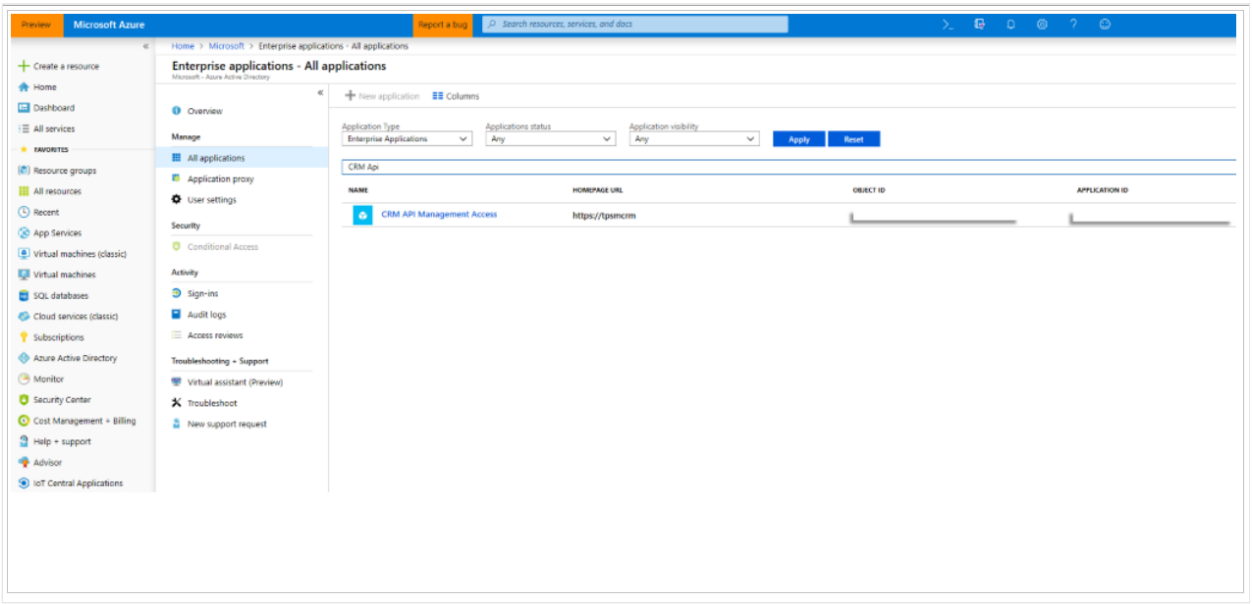
- Owner in role assignments (see the following screenshot)
- One of the following administrator roles:
  - Co-administrator
  - Service administrator
  - Account administrator



3. You'll see subscriptions that are tied to your sign-in **primary active directory** only. For example, david@contoso.com will see subscriptions from the contoso.com directory only. If jason@fabrikam.com invites David into their fabrikam.onmicrosoft.com subscription, David won't be able to use the fabrikam subscription on the deployment app.

4. Organizational Azure accounts only can be used to deploy CCS with IoTHub; personal accounts such as Outlook or Gmail can't be used.

5. Your user must have permission to use the Dynamics API within the Microsoft Entra ID tenant.



Installation and setup - Connected Customer Service for IoT Hub

Article • 04/04/2022

This guide provides the steps required for getting up and running with Connected Customer Service (CCS) for IoT Hub. If you're looking for information about CCS for IoT Central, be sure to visit our tutorial on getting set up.

Prerequisites

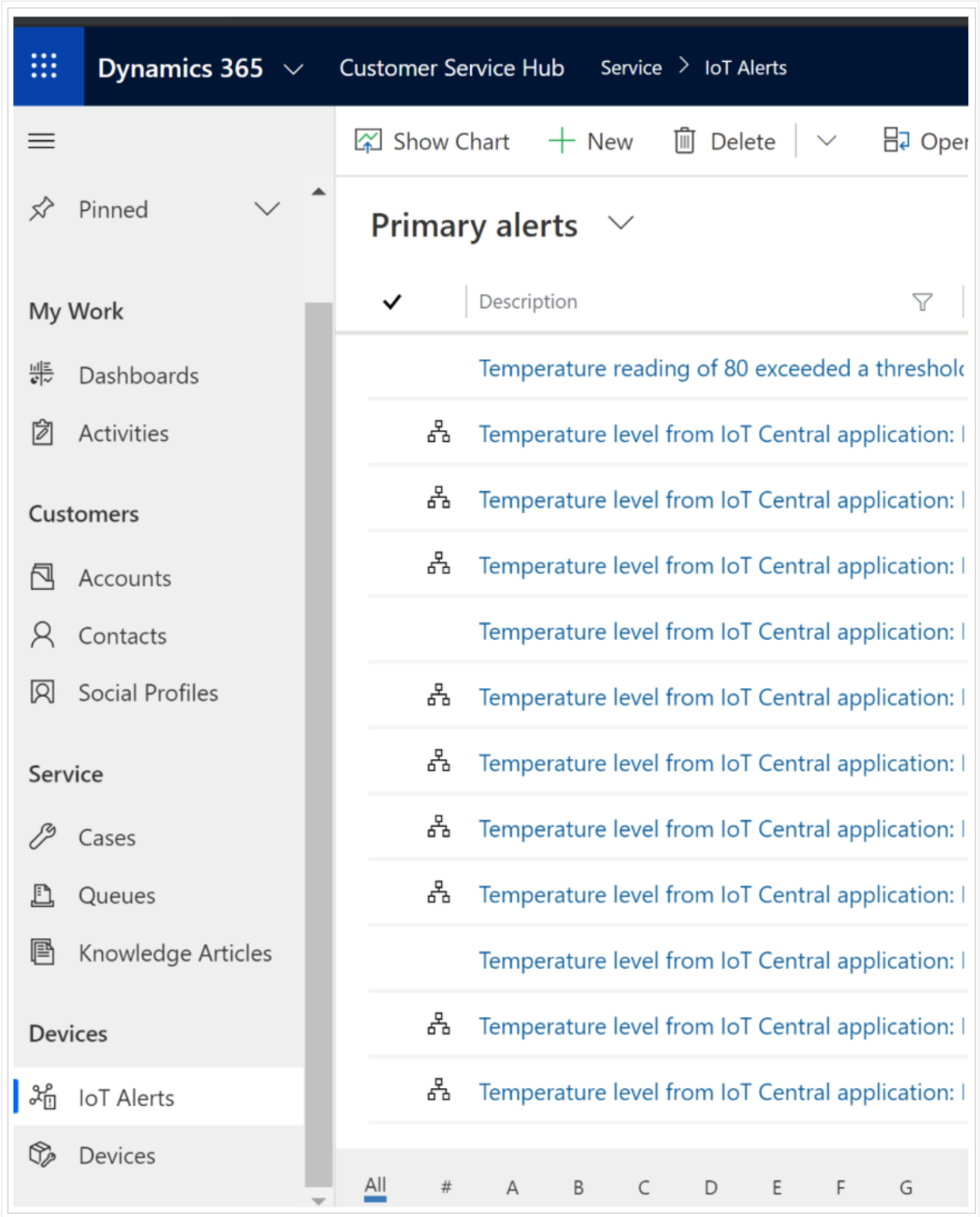
Before you install Connected Customer Service, make sure you have the following:

- Dynamics 365 system administrator credentials. For users with Microsoft 365 global administrator access, they must be assigned the **System Administrator** security role within the Dynamics 365 organization.
- An IoT – Administrator role in the IoT solution (to access IoT entities and IoT functionality), plus another role, like Customer Service – Dispatcher (to access Dynamics 365).
- An active Azure subscription with appropriate privileges. See our topic on Azure prerequisites for more information.
- Microsoft Power BI PRO and the sample report template. More information: Download the Power BI Template for Connected Customer Service

Install Connected Customer Service

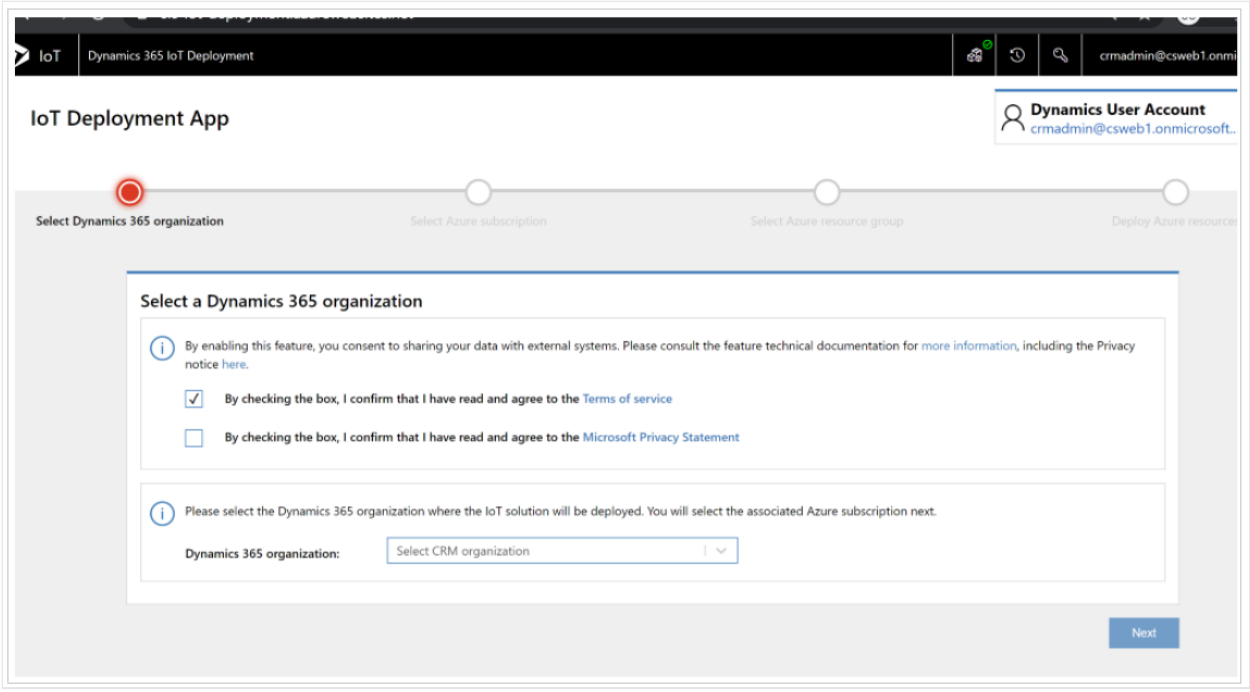
Connected Customer Service is included with Dynamics 365 Customer Service. Creating a new Customer Service environment or upgrading an existing one to v9.0.20034.20XX+ will automatically include the following Connected Customer Service entities and related processes:

- Devices
- IoT alerts



Verify you have the Connected Customer Service entities in your environment.

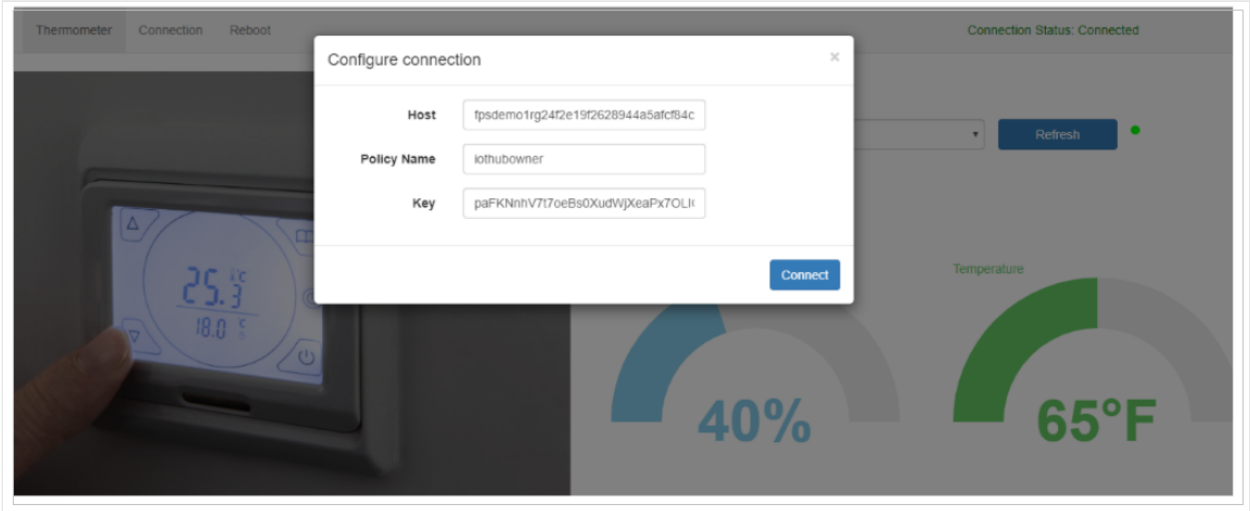
Next, deploy and connect Azure IoTHub to your Customer Service environment by going to https://iotdeployment.dynamics.com/ and following the instructions.



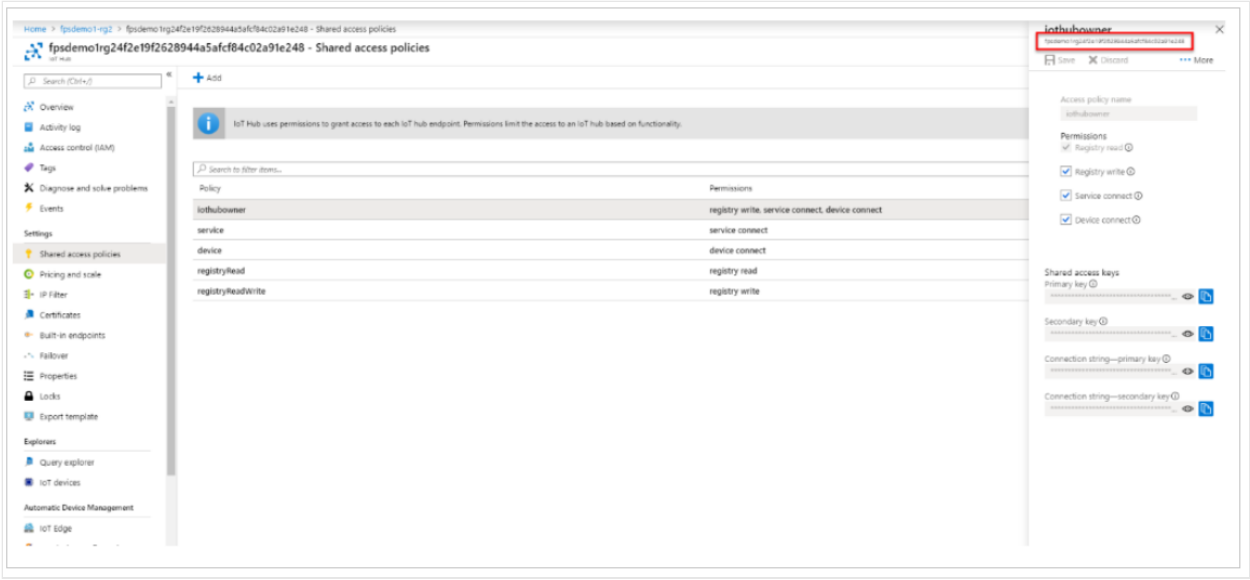
Set up the sample simulator (optional)

To find the simulator URL, sign in to your Azure subscription, and then select the App Service resource type under the newly created resource group. You'll see the URL is in the top-right corner. Copy the URL and complete the following steps:

1. Paste the URL into your browser's address bar to load the page.
2. When the simulator page opens, click **Configuration**.
3. Enter the IoT hub host name and key. The host is simply the name of the IoT Hub resource in Azure portal.



The key can be accessed by clicking on the IoT Hub resource and going to the shared access policies, then copying the primary key for **iothubowner** as seen in the following screenshot.



4. Select the IoT hub in the **Resource Group**.

5. On the left under **General**, click **Shared access policies** to get the host name and primary key.

6. Make sure **Connection status** is marked as **Connected** and then close the dialog box.

   Now you can send a test command by using the sample simulator. For example, click the temperature and increase it to above 70 degrees.

Set up a Power BI chart (optional)

Set up Power BI accounts and open the sample .pbix report.

1. Go to https://powerbi.microsoft.com and create a free Power BI account.

2. Install Power BI Desktop.

3. Sign in to Power BI Desktop with the Power BI user credentials (we recommend that this user is the same as the Dynamics 365 user).

4. Download and open the sample Power BI template.

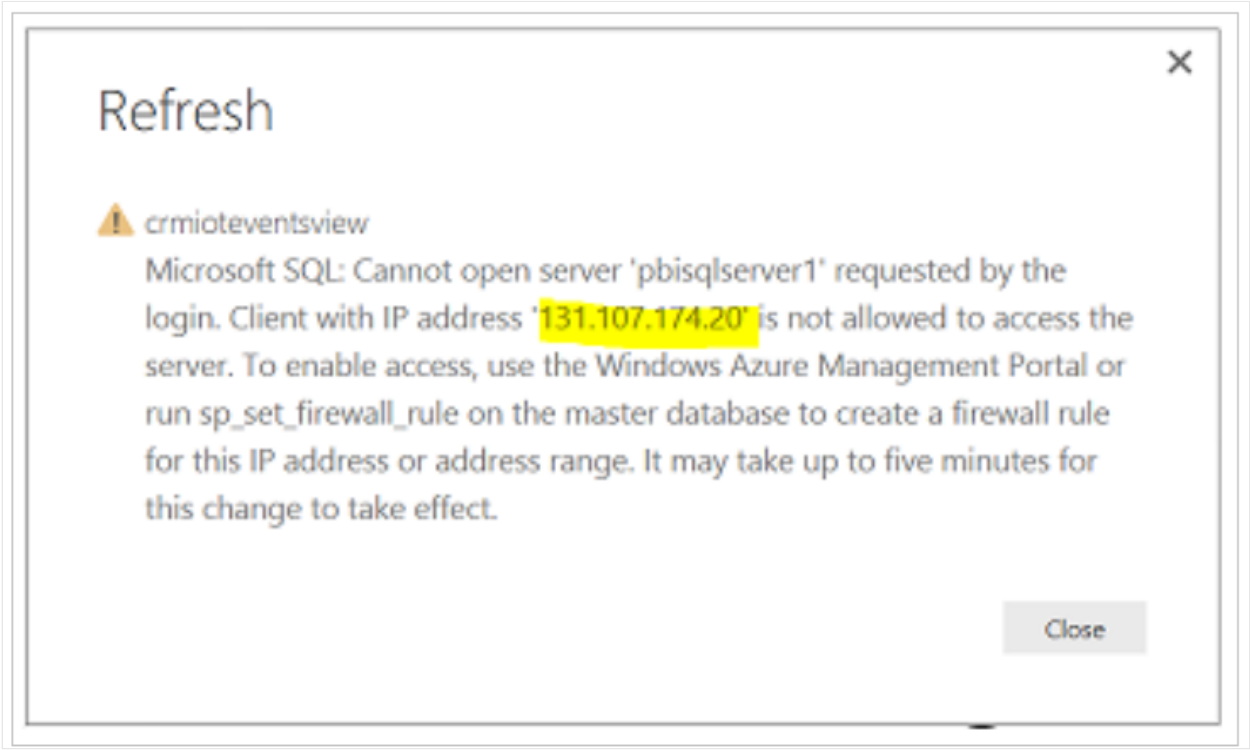
   The Power BI report will open with errors because it was created with a sample SQL database and user. Update the query with your SQL database and user, and then publish the report to Power BI.

Update the query to point to your SQL database

1. Select **Edit Queries**.

2. Select **Advanced Editor**.
3. Replace the source SQL database with the database provisioned in your Azure resource group.
4. Select **Close and Apply**.

   You can find your SQL server name in the SQL database in the Azure portal.
5. Add your IP address to the SQL server firewall to allow Power BI Desktop to connect to the SQL server.
6. Copy the IP address when you see this message.



7. Go to the Azure portal, open the SQL server, and add your IP address to the firewall.

Publish to your Power BI account

1. Save your changes and publish.
2. Once you publish, Power BI Desktop will provide a link and message that instructs you to open the report and provide credentials.
3. Once the report is open, you'll see notifications to edit your credentials.
4. Enter the SQL server admin user name and password to allow Power BI to access your database.

5. In the Power BI sidebar, open the report and pin these tiles to a dashboard. You can create a dashboard or pin to an existing one.

6. Save the dashboard, and then share it with any users who have permissions to see the dashboard and tiles.

    - In the top-right corner of the dashboard, click **Share**, enter the users email address, and click the **Share** button.

Pin the tile in Dynamics 365

1. Open the device, alert, or asset form.

    > **Important**
    >
    > The device that is related to any of the open forms must have a device ID and be registered; otherwise, the PowerBI section will be hidden.

2. The first time you will need to specify the tile you want pinned. After that, the tile will load when you go to the page.

    a. Select the **Add** button.

    b. A configuration window displays. Sign in if prompted.

    c. Pick your dashboard and tile.

    A preview of the tile will load; however, if you have not run the simulator for that device, there will be no data, as shown here.

3. Save the tile.

4. The config window closes, and the Power BI section reloads with the pinned tile.

5. The tile is filtered to the device ID of the current entity.

6. The next time you load any of the device, alert, or asset forms, the Power BI section will load the tile automatically, filtered to the current entity device ID (if there is a device ID and the device has been registered).

Categorize devices

You can also manage devices by categorizing them. For example, you can categorize devices by the commands they support, the type of device, or by devices that break

down more often.

Create a new IoT device category

You can create a new IoT device category in the Customer Service Hub or on Customer Service admin center app.

1. Go to one of the apps, and perform the following steps.

   Customer Service admin center

   a. In the site map, select **Miscellaneous** in **Operations**.

   b. In the **Device Categories** section, select **Manage**.

      The **Active IoT Device Categories** view is displayed. You can switch between various system views using the drop-down list.

2. On the command bar, select **New**.
3. Enter a **Name** for the device category.
4. Use the helpful tooltips to fill in information.
5. When you're done, select **Save**.
6. Open the IoT device category record that you created.
7. In the **Devices** section, click **Add IoT Device record**, and then add a device to the category.

Add devices to an existing category

1. From the main menu, select **Internet of Things** > **Registered Devices**.
2. Select an IoT device record to open it.
3. In the **Category** field, use the search button to find and add the device to a category.

View device readings

After a device is registered, you can open the record to view the readings sent by the device. For example, if you're monitoring a thermostat, your reading will show the thermostat temperature.

By default, you can view the last 20 readings. You can change the default setting in the Power BI report by using Power BI Desktop.

1. To view a device reading, from the main menu, click **Customer Service** > **Devices**.
2. From the list of devices, choose a device and open the record.
3. Refer to the **Connect Device Readings** section to view the device readings.

Remotely send commands to a registered device

When a device isn't working properly, the system receives an alert. To troubleshoot the issue remotely, you can send a command by choosing a registered device or by using an existing IoT alert.

> ⓘ **Note**
>
> When you receive multiple alerts from the same device, the alerts will be listed in hierarchical order. You can change the grouping by changing the IoT - Parent IoT Alerts workflow.

Send commands from a registered device

1. From the main menu, click **Customer Service** > **Devices**.
2. From the list of devices, choose a registered device.
3. On the command bar, click **Send Command**.
4. Enter a **Name** for the command.
5. In the **MESSAGE TO SEND** box, copy and paste one of these supported commands. `{"CommandName":"Reset Thermostat","Parameters":{}}` `{"CommandName":"Notification","Parameters":{"Message":"Technician has been dispatched"}}` `{"CommandName":"Set Values","Parameters":{"Reading":{"Temperature":"30","Humidity":"30"}}}`

> **Note**
>
> Before sending a command, make sure there are no spaces or extra characters in the command.

6. On the command bar, click **Send & Close** to send the command.

Respond to an alert

1. Navigate to **Customer Service** > **IoT Alerts**.
2. Choose an existing IoT alert record.
3. On the command bar, select **Send Command**.
4. Enter a **Name** for the command.
5. In the **MESSAGE TO SEND** box, copy and paste one of the supported commands listed in the section above.
6. On the command bar, click **Send & Close** to send the command.

View history of commands sent to a device

1. From the main menu, click **Customer Service** > **Devices**.
2. From the list, choose a device.
3. Scroll down to the **Command** section to view the history.

Create business process flows to automatically handle incoming IoT alerts

When you receive an alert from a device, your service team can manually monitor the alerts and troubleshoot the issue remotely. If the issue is not resolved by sending a remote command, the service rep can create a case or work order and dispatch a field tech. The provided business process flow guides you through the process of manually responding to IoT alerts. More information: Create a business process flow

View the IoT dashboard

The default IoT dashboard provides data on registered devices and alerts. More information: Create or customize dashboards

1. From the main menu, click **Customer Service** or **Internet of Things**.
2. Select **Dashboard**.
    - The first chart shows alerts that you can sort by clicking the IoT **Alerts by** menu.
    - The second chart shows alerts by time.
    - The third chart shows alerts along with the action taken to resolve the issue.

Privacy notice

By installing Connected Customer Service for Dynamics 365, when you provide your Azure subscription information, the required Azure resources (listed below) will be deployed and your Dynamics 365 for Customer Engagement instance will send data (such as commands and registrations) to Azure to enable IoT–enabled scenarios that register devices and then send and receive commands to the registered devices. An administrator can uninstall Connected Customer Service to remove the functionality and then navigate to the Azure portal to manage any related Azure services that are no longer needed.

Azure components and services that are involved with Connected Customer Service functionality are detailed in the following sections.

Note: For more information about additional Azure service offerings, see the Microsoft Azure Trust Center.

Service bus queue

This provides a queue for both inbound and outbound messages (commands) flowing between Dynamics 365 for Customer Engagement and Azure. When an IoT alert is sent to Dynamics 365 for Customer Engagement, or a command is sent from Dynamics 365 for Customer Engagement to the IoT hub, it will be queued here.

Logic Apps

This provides an orchestration service that uses a Dynamics 365 for Customer Engagement connector and a Queue connector. Dynamics 365 for Customer Engagement connectors are used to construct entities that are specific to Dynamics 365 for Customer Engagement and Queue connectors are used for polling the queue.

Stream analytics

This provides a fully managed, real-time event processing engine that helps to unlock deep insights from data. Stream Analytics makes it easy to set up real-time analytic computations on data streaming from devices, sensors, web sites, social media, applications, infrastructure systems, and more. It is functioning as a funnel to send selective IoT alerts to Dynamics 365 for Customer Engagement.

IoT Hub

Connected Customer Services uses the IoT Hub to manage the state of registered devices and assets. In addition, the IoT Hub sends commands and notifications to connected devices—and tracks message delivery with acknowledgement receipts. Device messages are sent in a durable way to accommodate intermittently connected devices.

Simulator

This is a test web app to emulate the device that is sending commands or receiving commands from the IoT hub.

Azure SQL Database

Connected Customer Service uses SQL Azure to store device heartbeat messages for later use by PowerBI to show the status of devices in Dynamics 365 for Customer Engagement.

Azure Blob Storage

Queries that Stream Analytics will use are stored to Azure Blob storage.

Azure Time Series Insight (Preview)

Authorizing API connections between Dynamics 365 and Azure IoT

Article • 08/11/2022

In order to begin using Connected Customer Service (CCS) with IoTHub, you need to authorize CRM API Management Access, which is the final step when deploying from https://iotdeployment.dynamics.com/. This allows data and actions to be passed between Azure IoTHub and Dynamics 365. More specifically, it allows LogicApps to read and write Dynamics 365 data bi-directionally.

Without completing this step, you will not be able to:

1. Send IotAlerts from IoTHub to Dynamics 365
2. Add a device in Dynamics 365 and register it in IoTHub

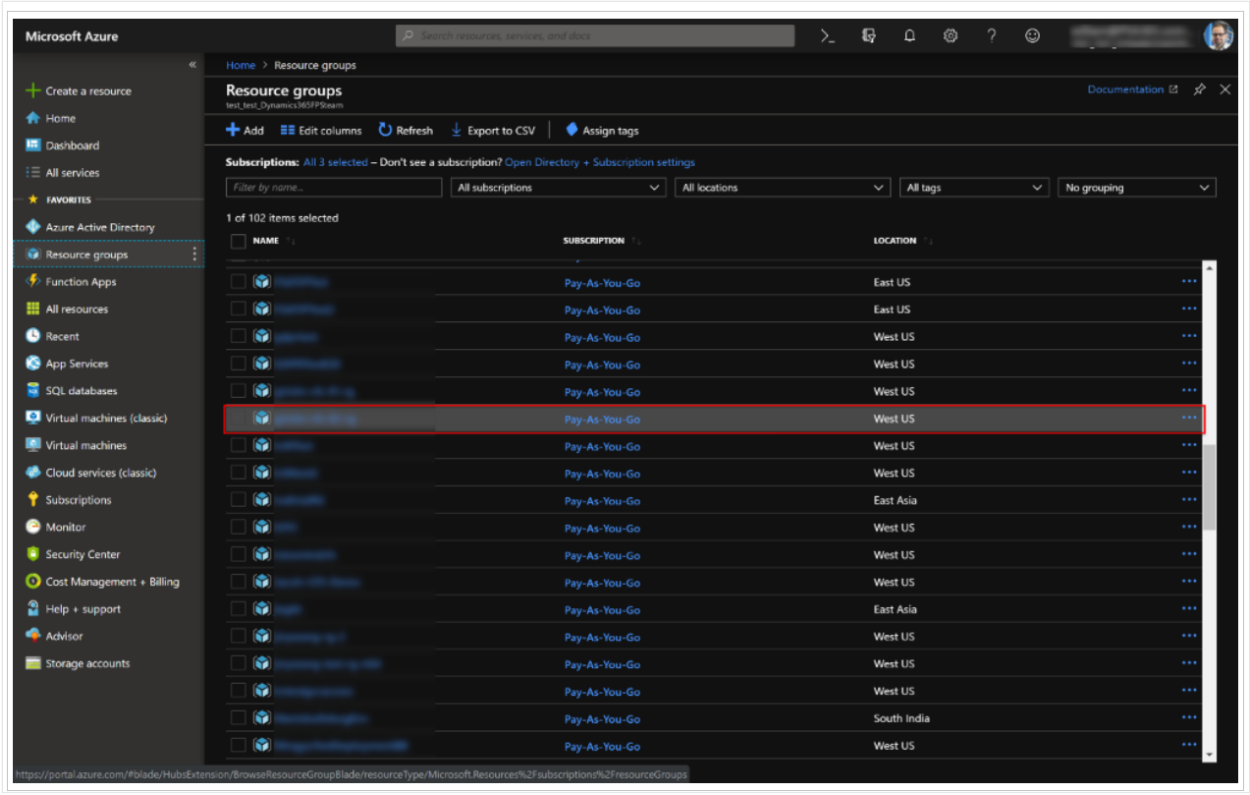
Prerequisites

- Azure account and subscription
- Dynamics 365 Customer Service
- CCS with IoTHub deployed though deployment app

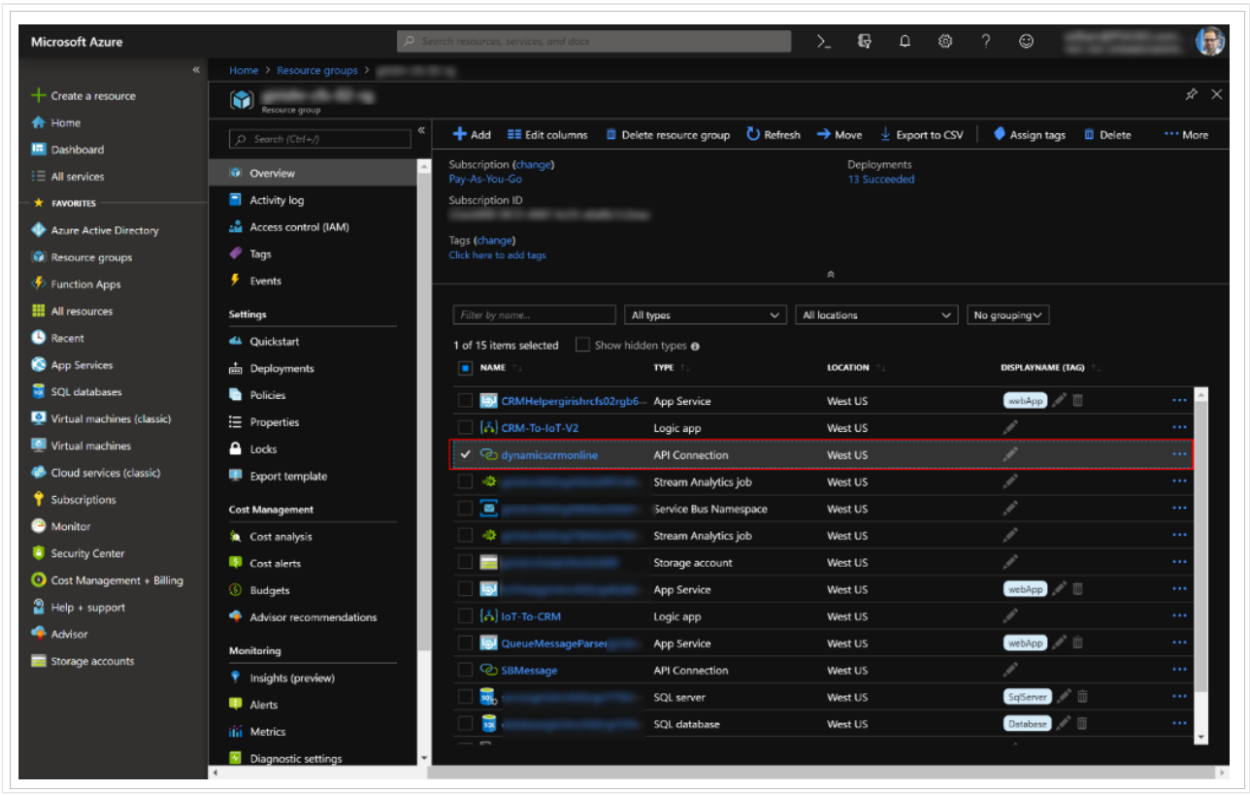
Instructions

Sign into your Azure account, and then go to the Azure portal.

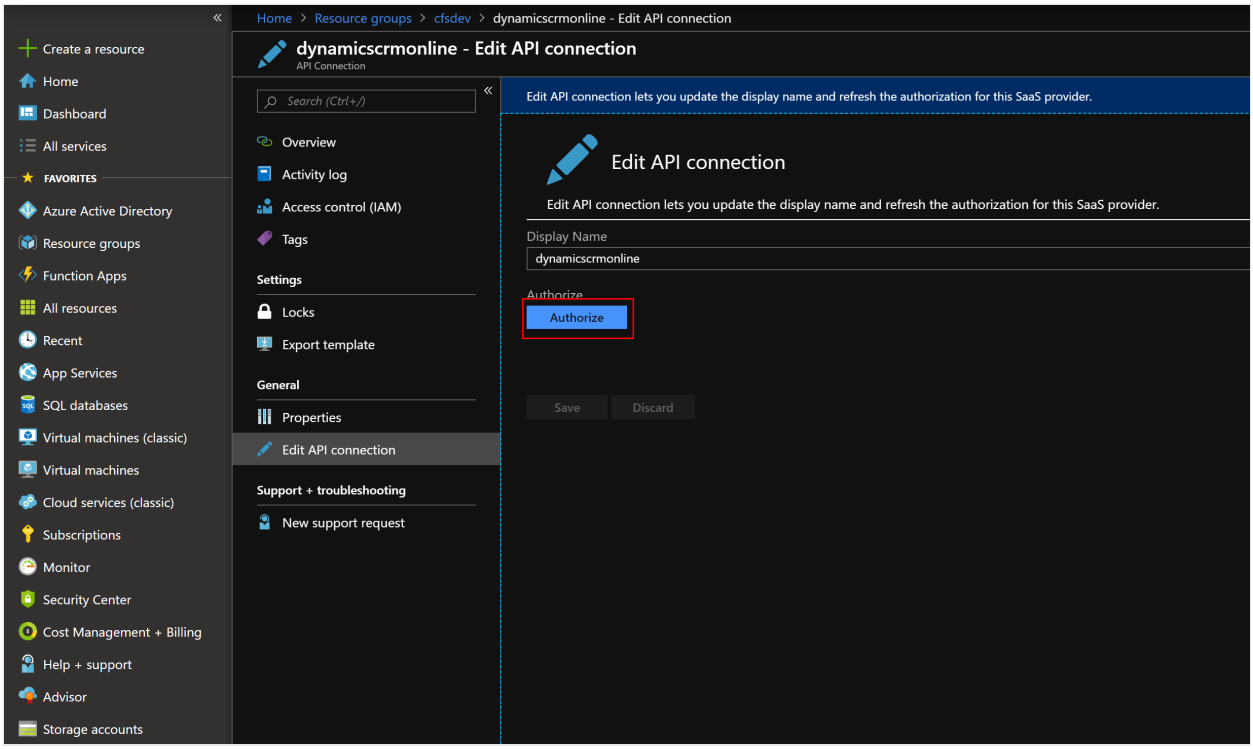
From there, go to **Resource Groups** and find the resource group you recently deployed IoTHub to. See the following screenshot for reference.



One such resource will be an API Connection type to Dynamics CRM. Select and edit this resource.



Finally, select **Authorize**, **Save**, and use your Dynamics 365 credentials that you use to sign into your Connected Customer Service environment, which may be different than your Azure credentials to the Azure portal.



Congratulations! You are now ready to pass data between Azure IoTHub and Dynamics 365 to use Connected Customer Service.

Visualize device readings

Article • 08/31/2023

> **Important**
>
> Azure Active Directory is being renamed to Microsoft Entra ID: No action is needed from you. **Learn more**

To help you understand the current state of a device, its repair history, and the effect of performed work orders, the Connected Customer Service add-in displays near real-time device readings and historical sensor measurements in a chart alongside work order details.

The device readings chart is available on the IoT alert, work order, case, device, and asset forms.

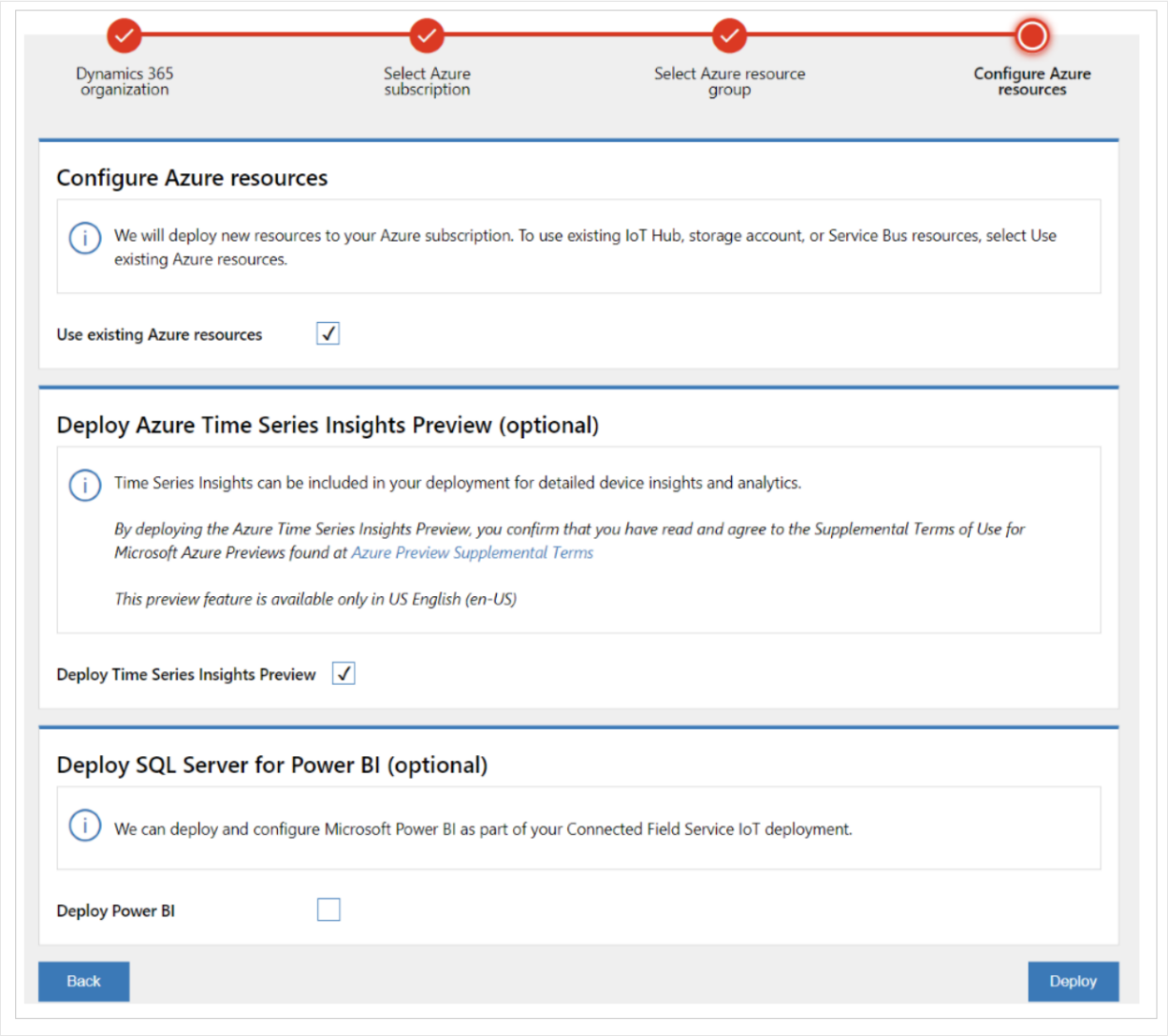
To enable the device readings chart, administrators need to deploy Azure Time Series (Preview) into the Azure subscription when deploying or upgrading Connected Customer Service with Azure IoT Hub for their organization. Administrators do the deployment through the IoT Deployment app.

Prerequisites

- Customer Service version 9.0.20034.20XX or higher
- Currently available in United States English only. This feature is in **preview** and it isn't available in all languages and geographies.

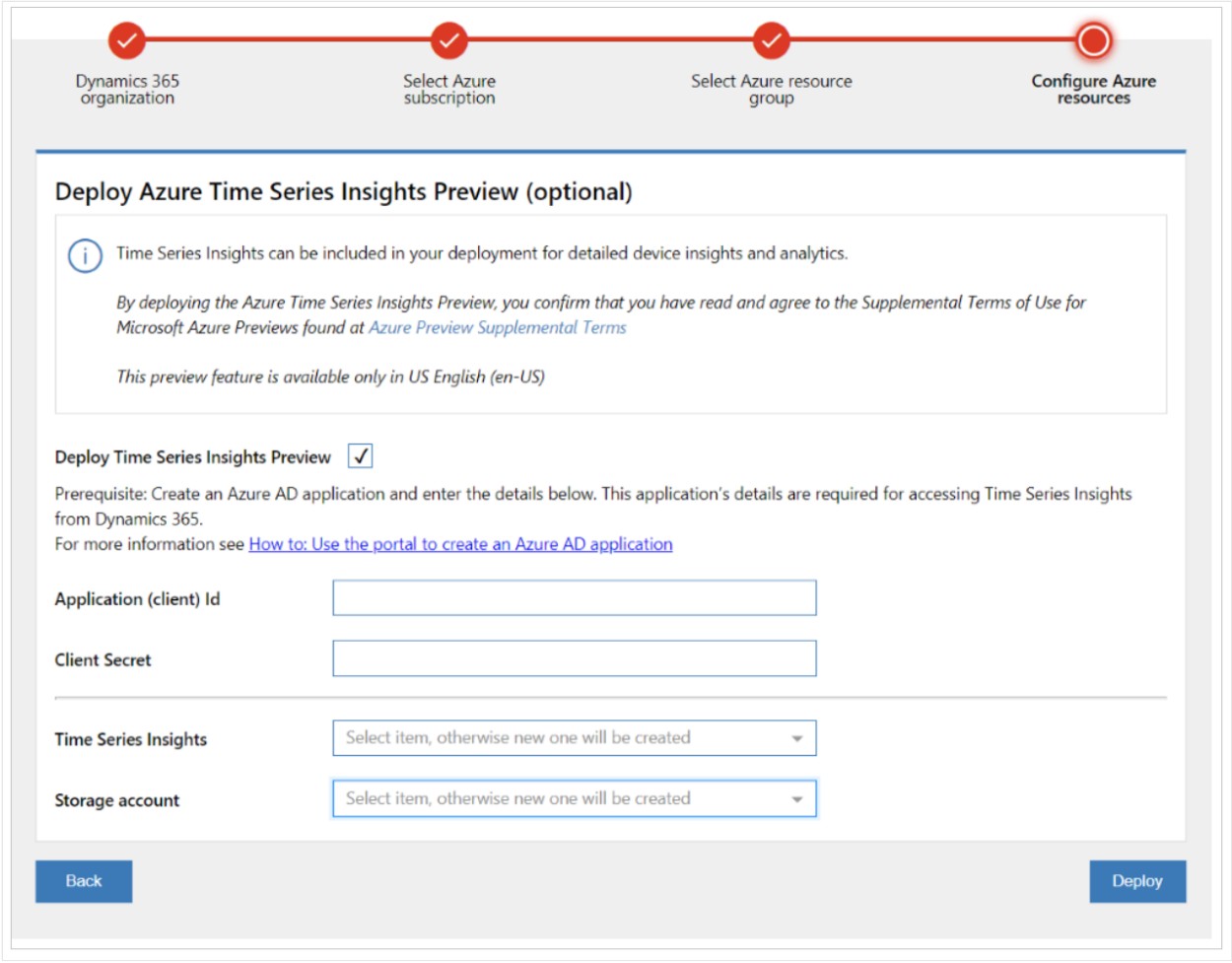
Enable the device readings chart

1. Open the Connected Customer Service IoT Deployment app.
2. Select the Dynamics 365 organization where the IoT solution will be deployed.
3. Select the Azure subscription and the Azure Resource Group. (Note: Select **Upgrade deployment** if you're updating an existing Connected Customer Service for IoT Hub deployment.)
4. Select the **Deploy Time Series Insight Preview** checkbox.
5. Select **Deploy**.



6. Follow the remaining steps in the IoT Deployment app to complete the Time Series Insights Preview deployment.

- Create the application (client) ID: Follow the steps in Create an Azure Active Directory application.
- Create the client secret: Follow the steps in Create a new application secret.



> **Note**
>
> - Storage account selection is only available when you're upgrading an existing deployment.
> - The IoT Deployment app adds timeseriesinsightsconsumergroup into the IoT Hub Consumer Group.

6. After deployment, the **Device Readings (Preview)** tab is displayed on the IoT alert, work order, case, device, and asset forms.

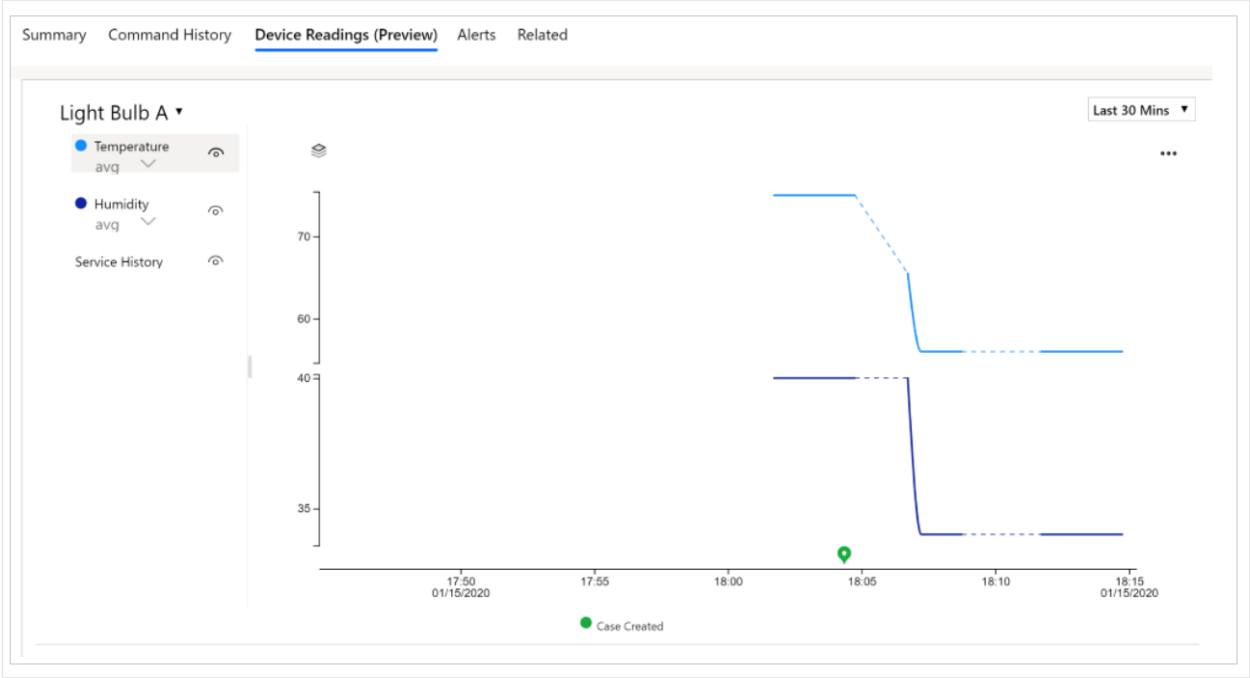
Use the device readings chart

To view device readings, the following data must be in place:

Form	Required data
Device	Device ID isn't empty.
Work order	The work order has a related IoT alert and the IoT alert has a related IoT device. The device ID in the IoT device isn't empty.

Form	Required data
Case	The case has a related IoT alert and the IoT alert has a related IoT device. The Device ID in the IoT device isn't empty.
Asset	The device ID isn't empty. The device readings chart is for the device ID set in Connected Device Attributes section of the asset form.
IoT alert	The alert has a related IoT device. The device ID in the IoT device isn't empty.

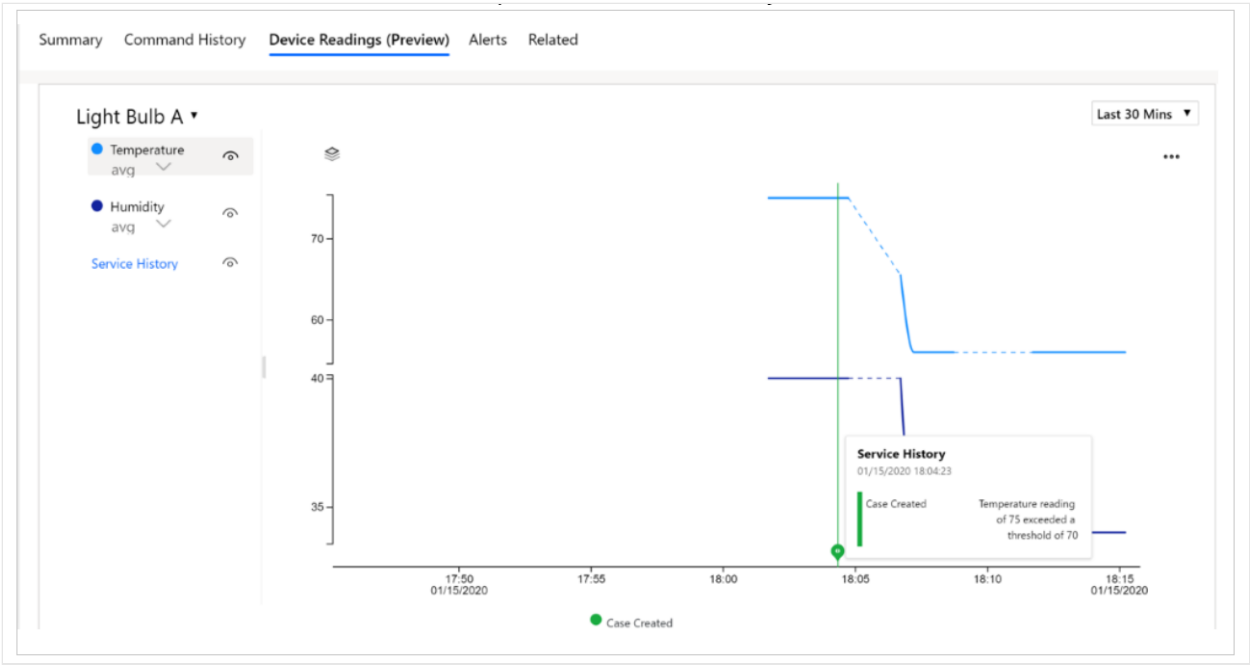
1. Open the **Device Readings (Preview)** tab on IoT alert, work order, case, device, or asset form.



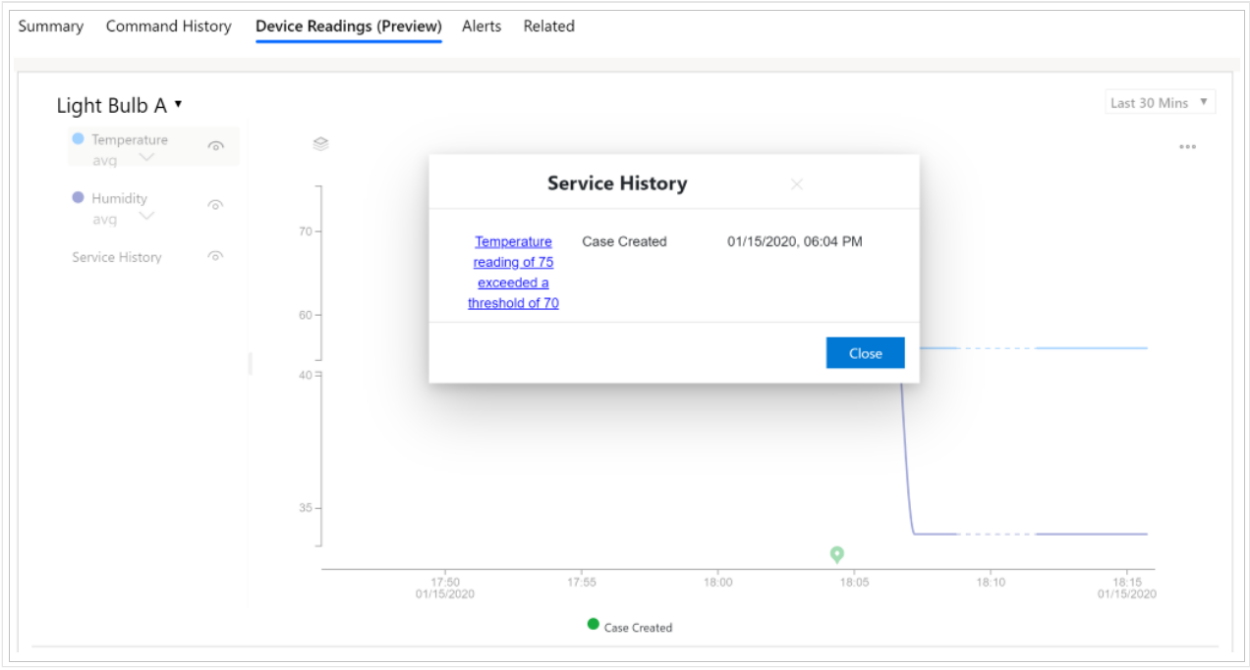
2. Choose the time period from the drop-down list. If the device sends device measurements to TSI, and the device measurement data exists for the selected time period, a chart is loaded.

3. Select the eye icon next to the measurement to show or hide the measurement on the chart.

4. Hover over the chart to see tooltip with measurement details.



5. Select the icon to view service history details.



6. Select the eye icon next to **Service history** to show or hide any case created and closed during the selected time period.

> ⓘ **Note**
>
> If there are no work orders in the selected time period, work order selection will not be displayed.

Error codes

Use the following table to troubleshoot error codes related to device readings.

Error code	Possible root cause	Suggested corrective action
5000101	Local Config Store isn't available	Contact Microsoft Support to investigate
4001002	Value for the Search Span parameter passed to the custom action msdyn_IoTHubQueryDeviceReadings is Null	Verify that valid values for all the required arguments are passed to the custom action msdyn_IoTHubQueryDeviceReadings
4000103	Value for the From or To date argument passed to the custom action msdyn_IoTHubQueryDeviceReadings isn't a valid DateTime	Verify that valid values for all the required arguments are passed to the custom action msdyn_IoTHubQueryDeviceReadings
4000104	Value for the Interval argument passed to the custom action msdyn_IoTHubQueryDeviceReadings isn't a valid Duration	Verify that valid values for all the required arguments are passed to the custom action msdyn_IoTHubQueryDeviceReadings. For interval, the format should be in the ISO 8601 Duration Format. For example: PT1H
4000201	Value for the IotDeviceId argument passed to the custom action msdyn_IoTHubQueryDeviceReadings isn't a valid Guid	Verify that valid values for all the required arguments are passed to the custom action msdyn_IoTHubQueryDeviceReadings. For IotDeviceId, the value should be the msdyn_iotdeviceid, which is a global unique identifier (GUID).
4010202	The user doesn't have permission to query Device Entity (msdyn_iotdevice)	Ensure the user can query Device entity (msdyn_iotdevice)
5000203	Unable to get msdyn_DeviceId for the given msdyn_iotdeviceid in the Device Entity (msdyn_iotdevice)	Make sure the attribute msdyn_DeviceId is populated for the device
5000204	Unable to get Time Series Insights Url for the given msdyn_iotdeviceid	Make sure that CFS Deployment App has deployed Time Series Insights for this CRM Org and the device is linked to the correct IoT Provider
5000205	Client Id used to get Azure AD token for TSI Authorization is invalid or an empty GUID (global unique identifier)	Make sure that valid Client ID is provided in the CFS Deployment App when it was executed
5000206	Client Secret used to get Azure AD token for TSI Authorization has expired	Update the Client Secret in Azure AD and re-run CFS Deployment App to update the new Client ID and Client Secret

Error code	Possible root cause	Suggested corrective action
5000207	Unable to get the access token to query Time Series Insights	Retry your request, and if the problem persists, try updating new Client ID and Client Secret by re-running the CFS Deployment App
5000603	Request to Time Series Insights API returned with a failure	Retry your request. If the problem persists, contact Microsoft Support to investigate
5000604	Response from Time Series Insights API isn't in an expected format	Retry your request. If the problem persists, contact Microsoft Support to investigate

Additional notes

- Available only in United States English (en-US)
- **Known issues:**
  - In custom time settings, the time zone is always set as UTC even when another time zone is selected. The time period displayed after applying the setting is always local time.
  - When deploying immediately after creating a new application (client) ID with the IoT Deployment app, you may see an **unable to deploy TSI with credential** error. Try again after one minute.
- Azure Time Series Insights (Preview) uses a pay-as-you-go (PAYG) pricing model. The pricing and cost estimate calculator is available at https://azure.microsoft.com/pricing/details/time-series-insights. Select the region where you're planning to deploy TSI to understand the storage and query cost. (TSI uses Azure blob to store the data.)

Extend Connected Customer Service solutions

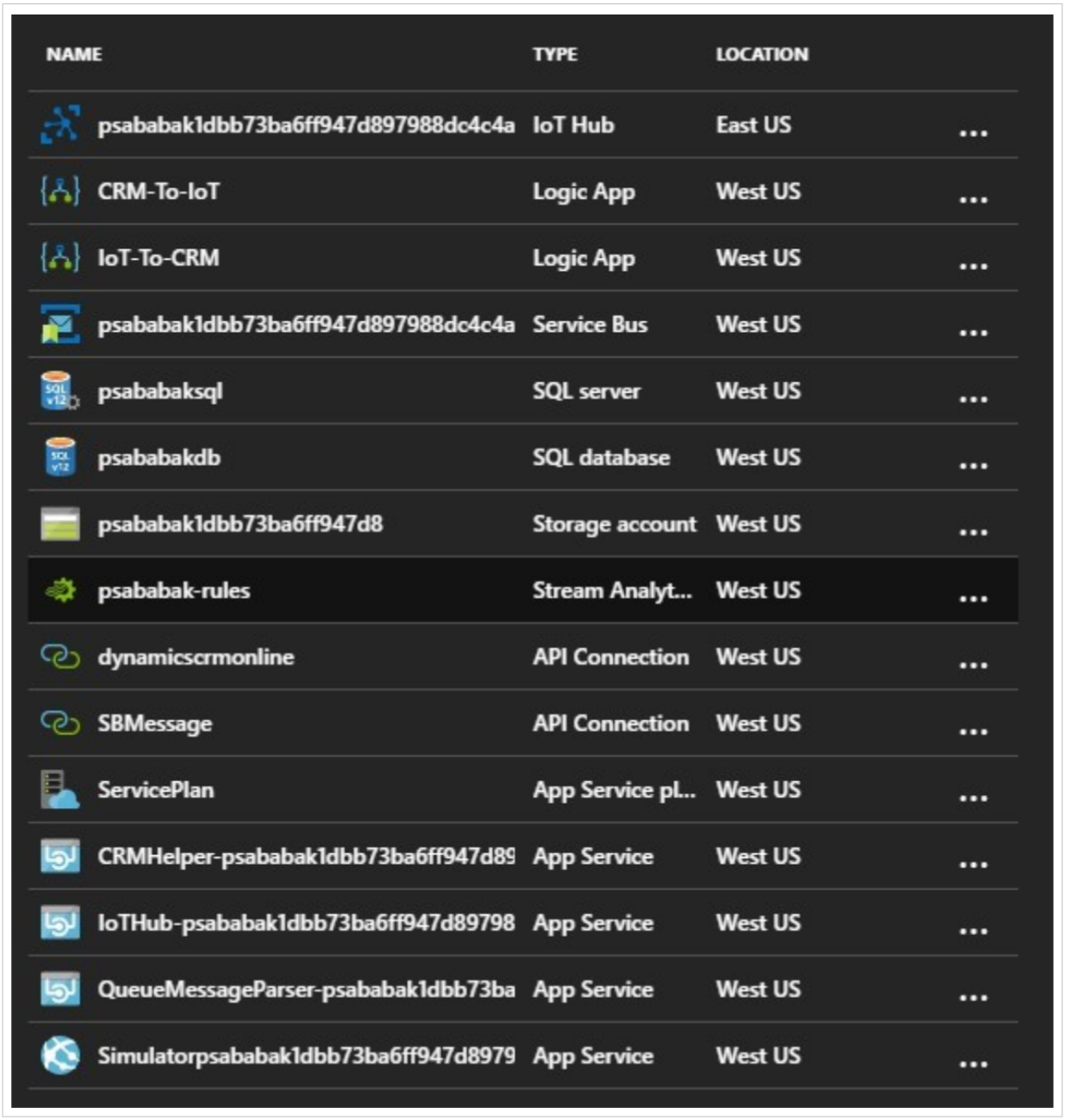
Article • 10/06/2022

Connected Customer Service for Dynamics 365 supports the customization of each standard component or service and the easy addition of custom Azure-based components and services. This flexible architecture is required to support the wide range of current and future IoT devices and the envisioned supporting services for these devices.

Extend Azure Services

The Azure services and components, including the ones detailed in Connected Customer Service architecture, are designed for reliability, scalability, and extensibility. They support management and customization through UI-based and PowerShell administration, JSON-based template-driven deployment and initialization, and REST-based programming interfaces (often including client libraries for specific languages, such as C#/.NET, Python, Java, and Node.js).

After the standard installation, Connected Customer Service will configure your resource group with a set of Azure services similar to the following.



Although extending these Azure services (or adding additional ones) is beyond the scope of this topic, there are ample resources available to the developer, including the following from Microsoft:

- The Microsoft Azure site for product descriptions, pricing and trial offers, documentation, downloads, blogs, and related resources, including the Azure Documentation Center for developers and administrators. Most developers will want to download one or more Azure SDKs and tools such as the Azure Storage Explorer and the Azure Device Explorer.
- MSDN Channel 9 for a wide selection of current and ever-growing Azure videos and posts

Extend Connected Customer Service

> **Note**
>
> The Web API types and operations mentioned in this article/table are available in your environment and you can use the service document of your environment or Postman to explore these types and operations. More information: **Web API Service Documents** and **Use Postman with Microsoft Dataverse Web API**.

The following table lists the custom entities and processes that Connected Customer Service supplies to interface with the associated Azure services and components. These types are more fully described in `Microsoft.Dynamics.CRM.IoTConnector`.

Display Name (ID)	Type	Description
IoT – Debounce IoT Alerts (`Microsoft.Dynamics.CRM.msdyn_ParentIoTAlerts`)	Action	Links potential redundant alerts to an existing parent alert
IoT - Parent IoT Alerts	Workflow	Calls the `IoT - Debounce IoT Alerts` action and passes 60 for the `TimespanSeconds` parameter
IoT – Register Custom Entity (`Microsoft.Dynamics.CRM.msdyn_RegisterCustomEntity`)	Action	Registers any custom entity that may or may not already have connected IoT devices. This action invokes the `IoT – Register Device` action.
IoT – Register Device (`Microsoft.Dynamics.CRM.msdyn_RegisterIoTDevice`)	Action	Publishes the registration requests for an IoT device
IoT – Send Test Alert (`Microsoft.Dynamics.CRM.msdyn_IoTSendTestAlert`)	Action	*Reserved for future use*
JSON-based Field Value – Get Boolean (`Microsoft.Dynamics.CRM.msdyn_JsonGetBoolean`)	Action	Reads a Boolean property in the specified JSON object

Display Name (ID)	Type	Description
JSON-based Field Value – Get Number (`Microsoft.Dynamics.CRM.msdyn_JsonGetNumber`)	Action	Reads a numeric property in the specified JSON object
JSON-based Field Value – Get String (`Microsoft.Dynamics.CRM.msdyn_JsonGetString`)	Action	Reads a string property in the specified JSON object
IoT Alert (`Microsoft.Dynamics.CRM.msdyn_iotalert`)	Entity	Represents a notable event sent from the associated IoT Hub
IoT Device (`Microsoft.Dynamics.CRM.msdyn_iotdevice`)	Entity	Represents a connected device that can be registered with a IoT Hub
IoT Device Category (`Microsoft.Dynamics.CRM.msdyn_iotdevicecategory`)	Entity	Represents a logical grouping of IoT devices
IoT Device Command (`Microsoft.Dynamics.CRM.msdyn_iotdevicecommand`)	Entity	Represents an outgoing message to a device connected to the IoT Hub
IoT Device Registration History (`Microsoft.Dynamics.CRM.msdyn_iotdeviceregistrationhistory`)	Entity	Tracks registration activities of an IoT device

IOT enabling an entity type

Dynamics 365 entities can be associated to IoT entities listed above so that within Dynamics 365 they can participate in IoT-related business processes and analyses. There are two methods of "IoT enabling" a Dynamics 365 entity; you can:

- Programmatically form an association through the standard Dynamics 365 Connection entities capability. You can alternatively accomplish this same association through the administration UI; for more information, see Create connections to view relationships between records.

- Call the `IoT – Register Custom Entity` action to associate an entity with an existing or new `IoT Device`.

The IoT - Parent IoT Alerts workflow

Article • 02/23/2023

The **IoT - Parent IoT Alerts** workflow links potential redundant alerts to an existing parent alert.

> **Note**
>
> The Web API types and operations mentioned in this article/table are available in your environment and you can use the service document of your environment or Postman to explore these types and operations. More information: **Web API Service Documents** and **Use Postman with Microsoft Dataverse Web API**.

Calls the `Microsoft.Dynamics.CRM.msdyn_ParentIoTAlerts` API and passes 60 for the `TimespanSeconds` parameter. The primary entity for this workflow is `msdyn_iotalert`.

This workflow is an example that ships with the thermostat sample solution. It demonstrates how to handle duplicate/redundant alerts to Dynamics 365, which typically occurs when a device malfunctions. This approach is a recommended best practice because unfiltered alerts can result in duplicated remedial processing. For example, it could result in redundant reset commands sent or multiple repair orders generated. These alerts can also negatively affect the performance of your Dynamics 365 instance. (The thermostat sample is coded to filter duplicate alerts to avoid passing them to Dynamics 365, which is also a recommended practice.)

This workflow is enabled by default, but you can deactivate or edit it. For example, you can modify the time span.

Parameters

Data passes to the workflow using parameter(s).

Name	Type	Nullable	Unicode	Description
TimespanSeconds	Edm.Int32	false		Determines the time window to consider when parenting (or suppressing) an alert, from 60 to 180 seconds.

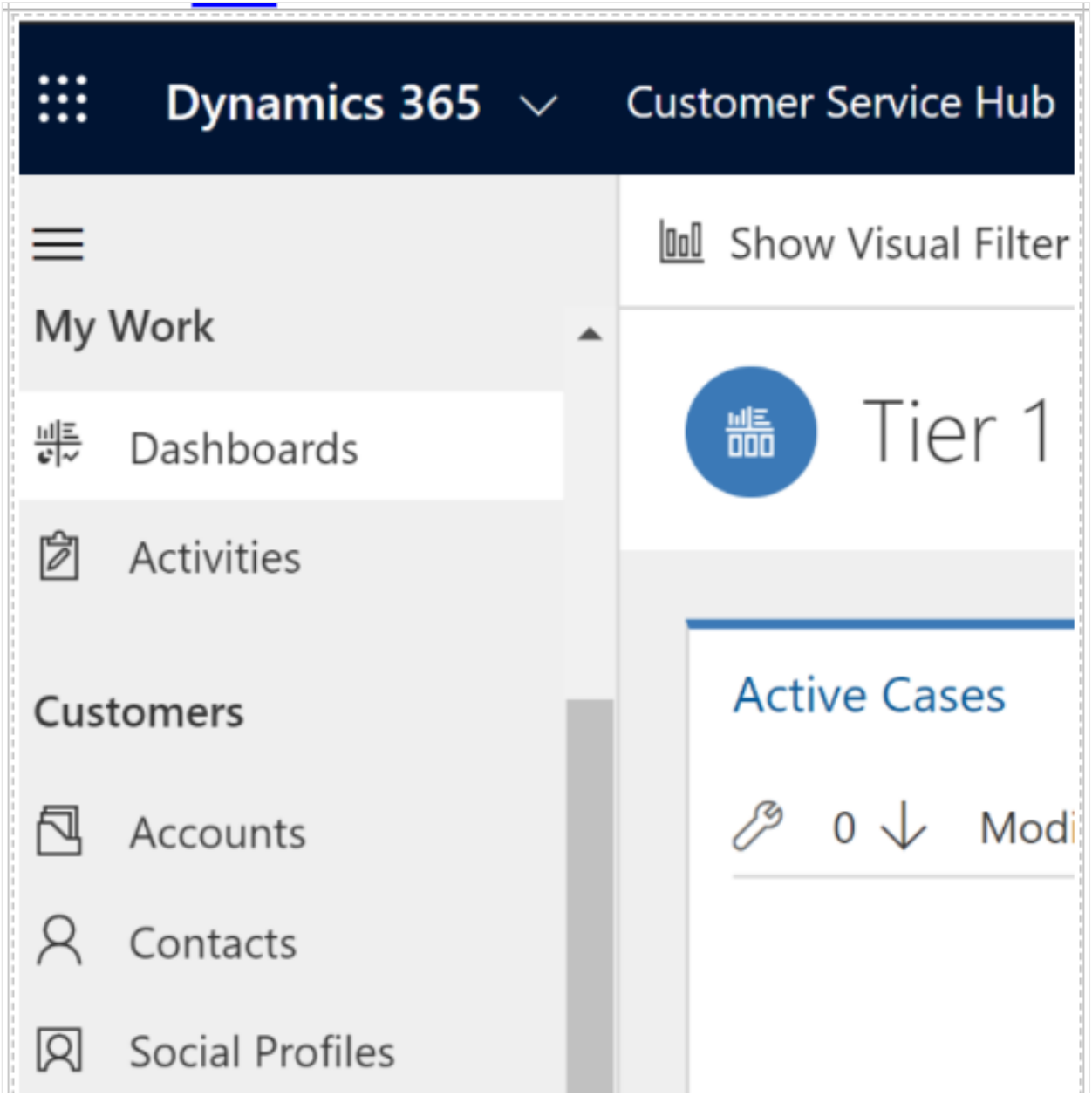
Security roles for Connected Customer Service

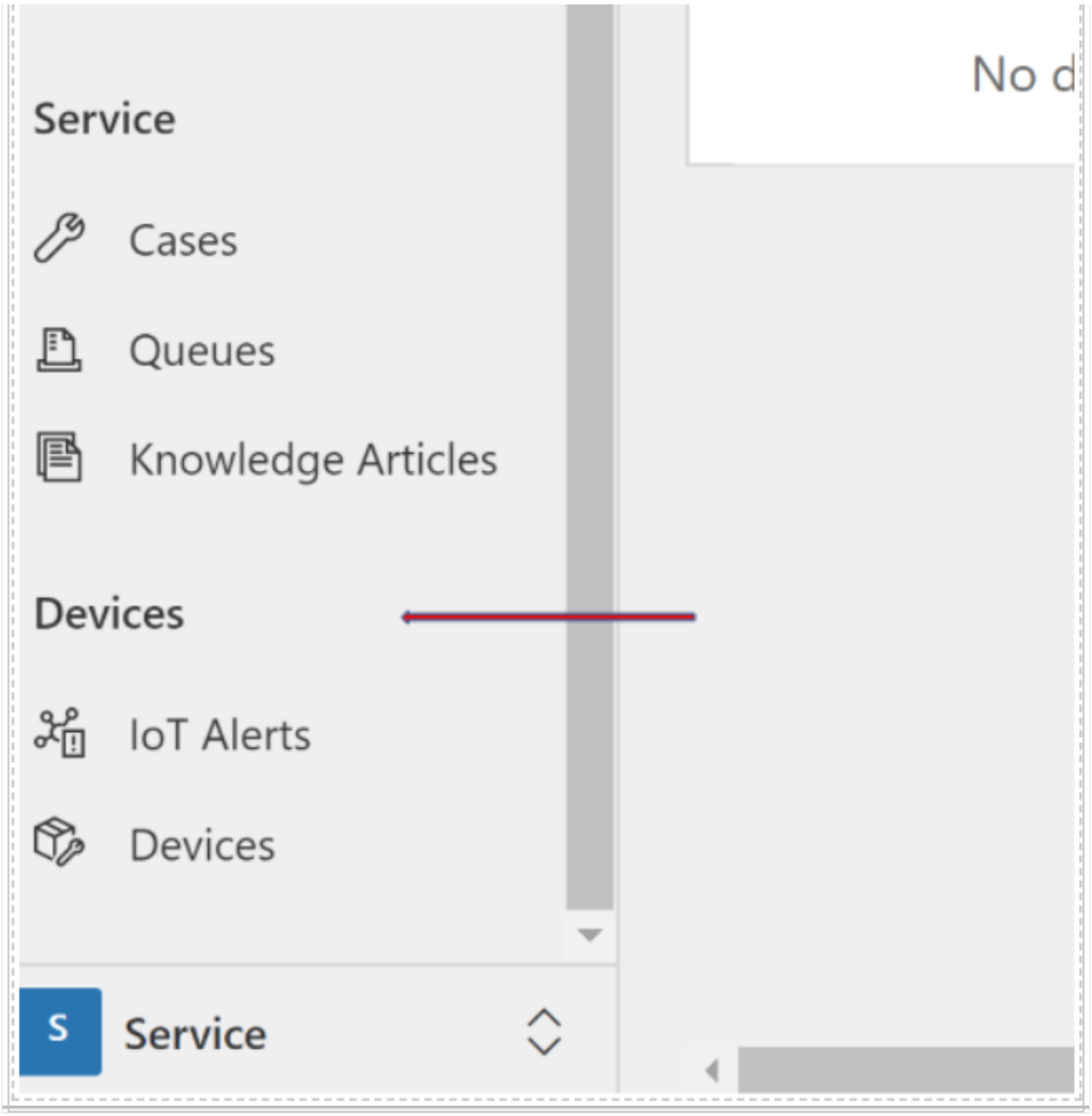
Article • 08/09/2022

Security roles for Connected Customer Service allow administrators to give appropriate access to Internet of Things (IoT) entities, including alerts, assets, devices, and commands, which are all included with Customer Service 9.0.20034.20XX +. These security roles should be added to existing Customer Service security roles.

1. Customer Service Representative who needs to work with device registration and device data pulls (IoT Hub operations).

- CSR should be given the IoT Administrator and IoT Endpoint User security roles. General knowledge of Customer Service security roles. For more information, see the topic on setting up customer service users and security roles.

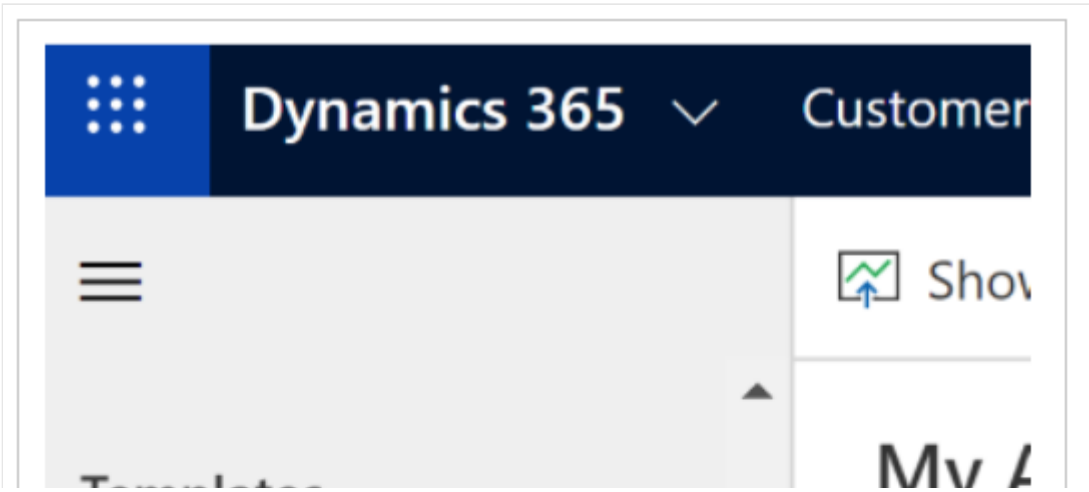


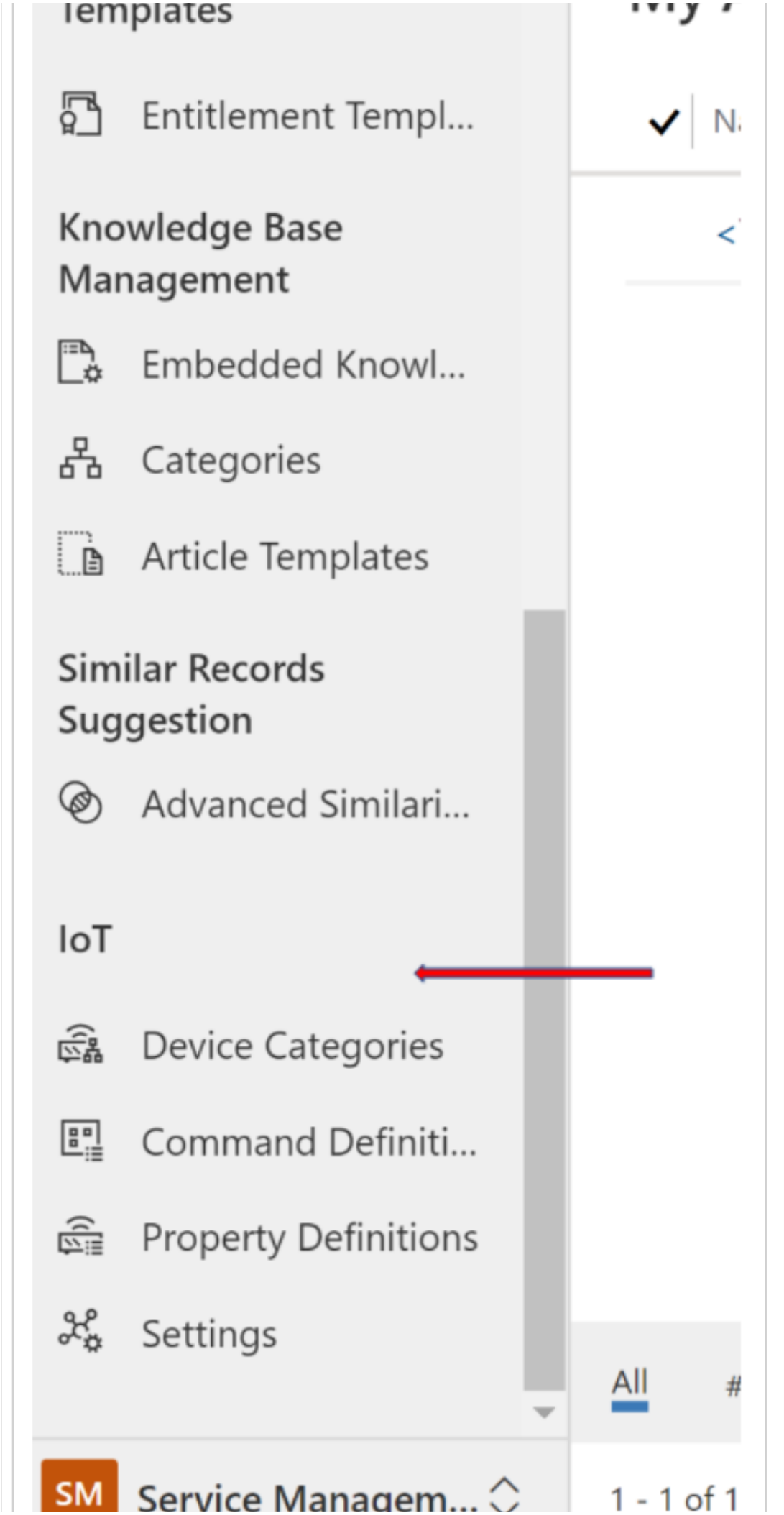


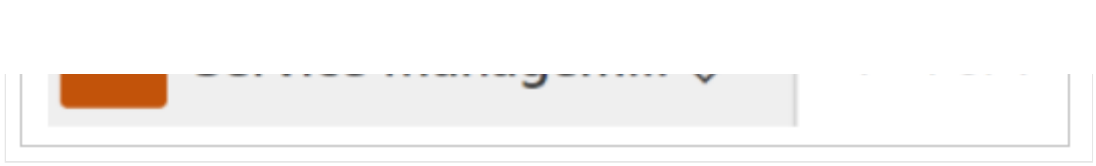
In general, access to IoT entities should mimic access to the customer asset entity for field service administrators, dispatchers, and resources.

2. A Customer Service administrator who needs to can set up IoT Configuration.

- The CSR admin should be granted Dynamics 365 system administrator access.




Templates
Entitlement Templ...
Knowledge Base Management
Embedded Knowl...
Categories
Article Templates
Similar Records Suggestion
Advanced Similari...
IoT
Device Categories
Command Definiti...
Property Definitions
Settings
All
SM
Service Managem...
1 - 1 of 1



Migrate from Omnichannel for Customer Service agent app to Customer Service workspace

Article • 08/25/2023

This article contains configuration information for migrating from the Omnichannel for Customer Service agent-facing app to Customer Service workspace. The Omnichannel for Customer Service agent-facing app was deprecated on April 1, 2023.

Prerequisites

To make configuration changes to Customer Service workspace, you must have one of the following roles:

- System Administrator
- System Customizer

Customize the Customer Service workspace app

The following sections walk through the customizations for the Customer Service workspace app to help you migrate from the Omnichannel for Customer Service agent-facing app.

> **Note**
>
> If you've customized the Omnichannel for Customer Service app in other ways beyond the customizations discussed in this article, you'll need to manually make those same customizations in Customer Service workspace.

Before you migrate, open the app designer if you want to identify the differences between the Omnichannel for Customer Service and Customer Service workspace apps.

1. Sign in to Power Apps and select **Apps** from site map.
2. Select **Customer Service workspace** and then select **Edit** to open the modern app designer.

The following table lists the components in Omnichannel for Customer Service that need to be configured in Customer Service workspace.

Category	Component to configure in Customer Service workspace
Entities	• Feedback • Goal • Phone to Case Process • Social activity
Views	• Views from the four entities (Feeback, Goal, Phone to Case Process, and Social activity) • Omnichannel for Customer Service has all the views selected but Customer Service workspace has selected views only. Include all the views from Account, Case, and Contact entity in the Customer Service workspace app.
Forms	• Forms from the four entities (Feeback, Goal, Phone to Case Process, and Social activity) • Account - Account for Interactive experience (default), TimelineWallControl - Case - Main • Case: Case for Interactive experience (default), TimelineWallControl - Case - Main • Contact - Contact for Interactive experience
Dashboards	• Omnichannel Agent dashboard • Omnichannel Ongoing Conversations dashboard
Business Process Flow	• Phone to Case Process • Users
Site map	• Routing diagnostics

Add pages in Customer Service workspace

Perform the steps in Add pages to your app to add pages in Customer Service workspace.

> ⓘ **Note**
>
> Select **Show in navigation** if you want the selected table to appear on the site map.

Set a form as the default form

You can set a form as the default form using the form order configuration or when a user sets the default form as a personalization setting. The default form order is set at in

the table instead of the app. Therefore, there can be one form order per table.

Perform the steps in Set the form order to set a form as the default form.

Add or remove entities in the Customer Service workspace site map

1. In Power Apps, open the Customer Service workspace app menu, and select **Edit** to open the modern app designer.
2. Under **Pages**, you see the following sections:

    - **Navigation** has the entities, which appear on the site map of Customer Service workspace. Hover over the entity you want to remove, select ellipsis (...), and then select **Remove from navigation**.
    - **All other pages** has the entities, which are available in the app but don't appear on the site map of Customer Service workspace. Hover over the entity you want to add, select ellipsis (...), and then select **Add to navigation**.

3. Select **Save and Publish**.

Add or remove the dashboard in Customer Service workspace

1. In Power Apps, open the Customer Service workspace app menu, and select **Edit** to open the modern app designer.
2. From **Pages**, select **New**.
3. Select **Dashboard**, and then select **Next**.
4. Compare the components with the Omnichannel for Customer Service site map, and add or remove components as needed.
5. Select **Show in navigation** if you want the selected table to appear on the site map.
6. Select **Save and Publish**.

Customize the environment in Customer Service workspace

1. To customize the environment, perform the steps in Add an app to a solution.
2. Publish the customization and export the solution.

Add the Phone to Case business process flow in Customer Service workspace

1. Sign in to Power Apps.
2. Select **Solutions** in the site map, and then open the solution that contains the existing model-driven app for Customer Service workspace.
3. Select the Customer Service workspace menu, and then select **Edit** to open the modern app designer.
4. Complete the steps in Add or edit model-driven app components in the Power Apps app designer to add the **Phone to Case Process** flow.
5. Compare the components with the Customer Service workspace app site map, and add or remove components as needed.
6. Select **Save and Publish**.

See also

Omnichannel for Customer Service app deprecation and migration FAQ
Get started with Customer Service workspace
Overview of the productivity pane

Enable the Omnichannel for Customer Service app and disable the Customer Service workspace app

Article • 06/28/2023

With the previously announced deprecation of the Omnichannel for Customer Service agent-facing app, the app is now hidden in environments. By default, Customer Service workspace is shown to the following user profiles:

- Omnichannel Agent
- Omnichannel Supervisor
- Omnichannel Administrator

If your business still requires the Omnichannel for Customer Service app, use the steps in this article to enable it.

If you don't want the Customer Service workspace app to be visible for any of the above profiles, follow the steps in Disable the Customer Service workspace app to remove it from the apps page in your environment.

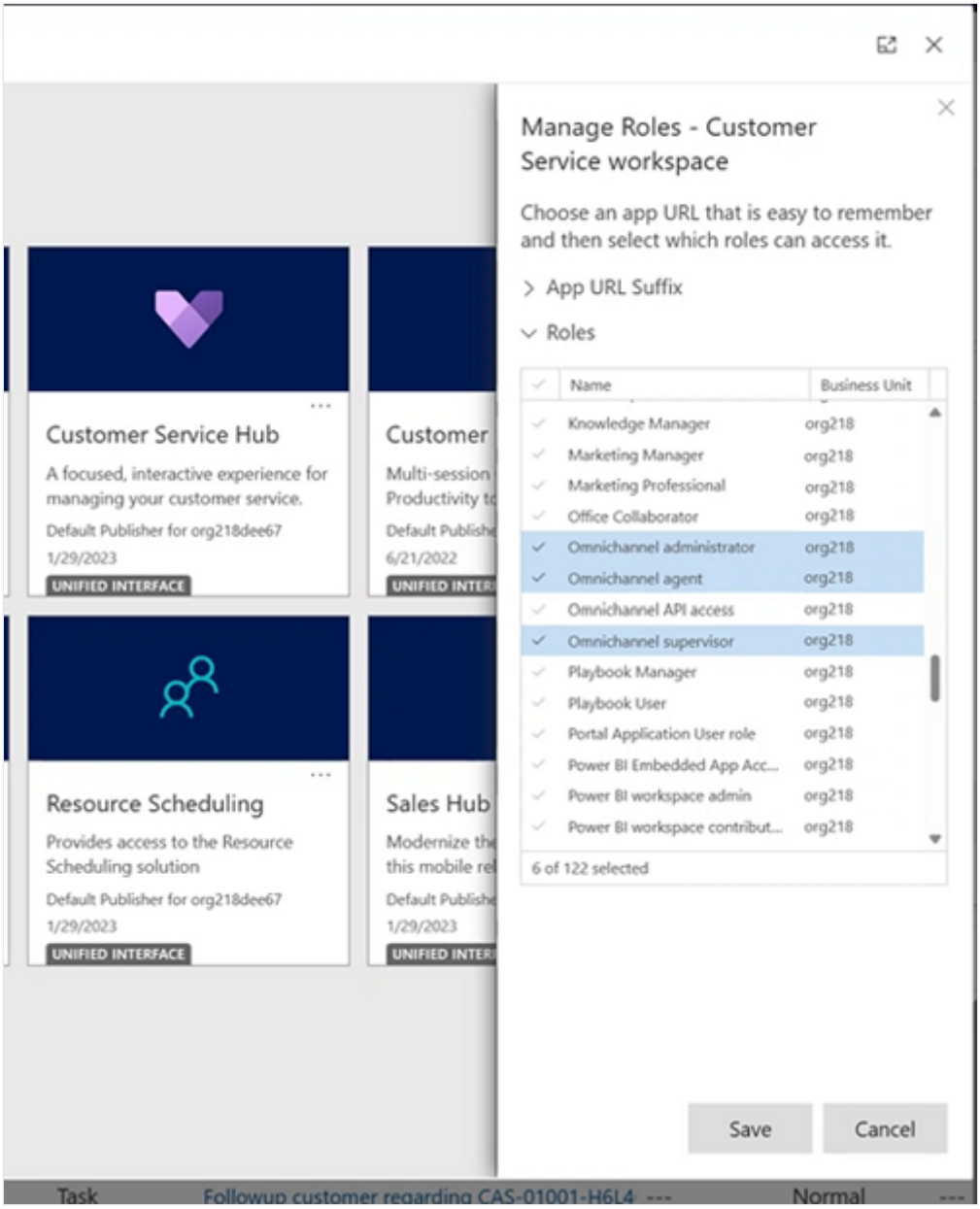
Enable the Omnichannel for Customer Service app

1. Sign in to Power Apps.
2. Select **Environment** on the top navigation bar. The **Select environment** pane is displayed.
3. Search for your environment, and then select it.
4. On the site map, select **Apps**, and then select the ellipsis next to **Omnichannel for Customer Service**.
5. Select **Activate**. Omnichannel then becomes visible on your environment's apps page.

Disable the Customer Service workspace app

1. On the Dynamics 365 **Apps** page, navigate to the **Customer Service workspace** app, and then select **MANAGE ROLES** from the app menu.

2. On the **Manage Roles - Customer Service workspace** right-side pane, deselect the roles you don't want the Customer Service workspace app to be visible to.



3. Select **Save**.

Next steps

For migration information, go to Migrate from Omnichannel for Customer Service to Customer Service workspace

Overview of data migration for records

Article • 08/02/2023

Use the Configuration Migration tool to migrate the configurations from the source organization to the target organization for the records that are based on unified routing.

For information on how to download and use the Configuration Migration tool, see the following articles:

- Download Configuration Migration tool
- How the Configuration Migration tool works

Prerequisites

Check for the following before you migrate your configuration data:

- In the source organization, if a unified routing ruleset refers to the following, then ensure that they exist in the target organization before you proceed with the migration:
  - Custom entities
  - Attributes
  - Relationships
  - Option sets
  - Lookup values
- Ensure that the user who performs the migration has the required privileges on the following entities in the source and target organizations:
  - Characteristic (characteristic)
  - Rating Model (ratingmodel)
  - Rating Value (ratingvalue)
  - Capacity Profile (msdyn_capacityprofile)
  - Queue (queue)
  - Operating hours (msdyn_operatinghour)
  - Overflow Action Config (msdyn_overflowactionconfig)
  - Decision contract (msdyn_decisioncontract)
  - Decision rule set (msdyn_decisionruleset)
  - Assignment Configuration (msdyn_assignmentconfiguration)
  - Assignment Configuration Step (msdyn_assignmentconfigurationstep)
  - Master Entity Routing Configuration (msdyn_masterentityroutingconfiguration)
  - Workstream (msdyn_liveworkstream)
  - Routing configuration (msdyn_routingconfiguration)

- Routing configuration step (msdyn_routingconfigurationstep)
- Workstream capacity profile (msdyn_liveworkstreamcapacityprofile)

Migrate configuration data for the record channel

Perform the steps in the following order to successfully migrate your configuration data from the source to the target organization.

1. Use FetchXML query to filter records
2. Migrate configuration using a solution
3. Migrate skill-based routing rulesets
4. Migrate capacity profiles
5. Migrate queues
6. Migrate intake rules
7. Migrate workstreams
8. Verify your data migration
9. Troubleshoot your data migration

> ⓘ **Important**
>
> The migration process doesn't include:
>
> - Intelligent skill finder
> - Effort estimation for routing (preview)
> - Sentiment prediction for routing (preview)
> - Role persona mapping
> - Presence
> - Queue membership

Next steps

Use FetchXML query to filter records

See also

Create a schema to export configuration data
Migrate configuration data for records
Verify migration of records

Troubleshoot migration of records

Migrate configuration data for live chat

Migrate configuration data for voice channel

Use FetchXML query to filter records

Article • 01/23/2023

This article discusses how to download the FetchXL query and edit it in the Configuration Management tool.

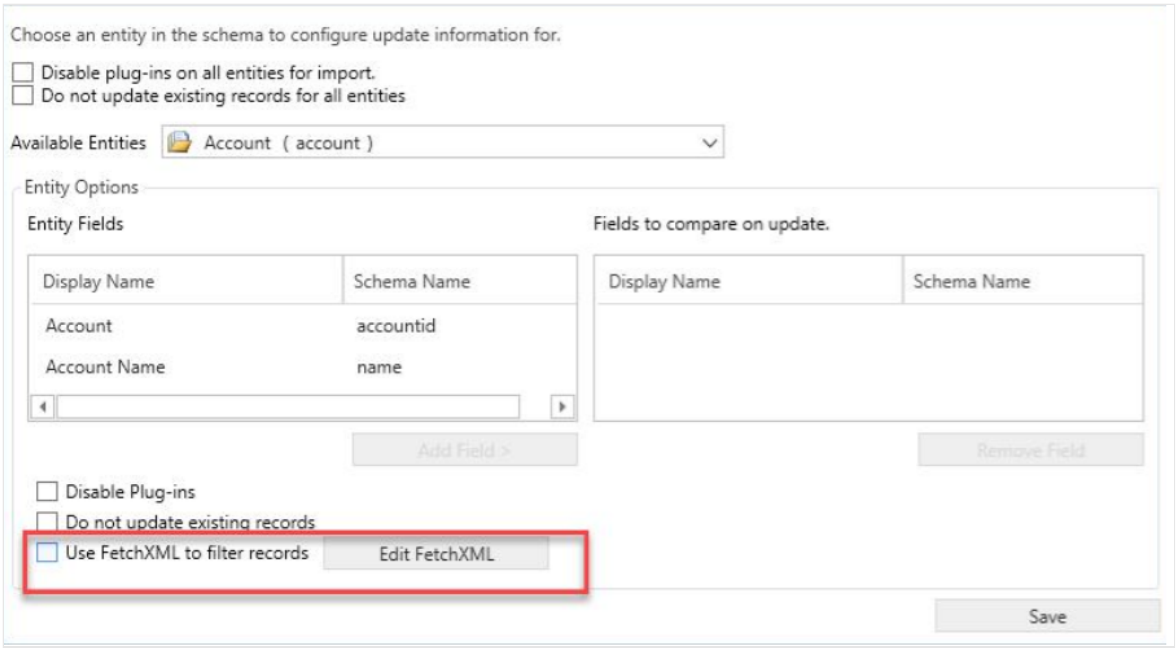
Generate FetchXML query

1. Use the **ADVANCED FIND** menu to create a personal view. More information: Create, edit, or save a view using legacy advanced find
2. Select one or multiple records of the entity to export. More information: Share a personal view.
3. Select **Download FetchXML**.
4. Edit the XML as follows:
    a. Remove "output-format=xml-platform".
    b. Remove all attribute elements.
    c. Remove the order attribute element.
5. Save and close.

Edit the FetchXML query in the Configuration Management tool

1. Open the Configuration Migration tool and in the **Tools** menu, select **Configure Import Settings**.

2. Select **Edit FetchXML**.



3. Enter your FetchXML query in the text box, and select **OK**.

Next steps

Migrate configuration data for records

See also

Create a schema to export configuration data
Overview of data migration for records
Verify migration of records
Troubleshoot migration of records
Migrate configuration data for live chat
Migrate configuration data for voice channel

Migrate configuration data for records

Article • 08/02/2023

This article includes procedures for migrating configuration data for records. You must migrate the data in the order of:

1. skill-based routing rulesets
2. capacity profiles
3. queues
4. intake rules
5. workstreams

The procedures include tables with entity information and corresponding sample schemas for each configuration.

Migrate configuration using a solution

You can use solutions to move certain configuration items between environments. If a configuration in your unified routing setup has the following items, they can be moved using a solution.

1. Add the components to a solution and export
   a. Agent Script (msdyn_productivityagentscripts)
   b. Agent Script Step (msdyn_productivityagentscriptsteps)
   c. Application Tab Template (msdyn_applicationtabtemplates)
   d. Notification Field (msdyn_notificationfields)
   e. Notification Template (msdyn_notificationtemplates)
   f. Macro (processes)
   g. Session Templates (msdyn_sessiontemplates)
   h. Template Parameter (msdyn_templateparameters)
2. Import the solution into the target environment

Migrate configuration for skill-based routing rulesets

If skill-based routing rulesets are used in your unified routing setup, perform the steps to migrate the corresponding configuration.

For sample schema to get all the required records, see Sample schema for skill-based routing configuration.

1. Use the Configuration Migration tool to create the schema and export data from the source organization for skill-based routing configuration.

   - **Entity display name**: When you create the schema, select the entities in the sequence that's mentioned in the table.
   - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't need to select the out-of-the-box system-defined attributes like Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes if necessary.

   > **Important**

You must manually create bookableresourcecharacteristictype (Global option set value) in the target organization, if necessary.

Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
Characteristic (characteristic)	• Characteristic Type (characteristictype) • Characteristic (characteristicid) • Description (description) • Name (name)	
Rating Model (ratingmodel)	• Max Rating Value (maxratingvalue) • Min Rating Value (minratingvalue) • Name (name) • Rating Model (ratingmodelid)	
Rating Value (ratingvalue)	• Name (name) • Rating Model (ratingmodel) • Rating Value (ratingvalueid) • Value (value)	

2. Generate the schema and save it.
3. Export the data and generate the compressed (zip) file.
4. Use the Configuration Migration tool, and select the option to import data into the target organization using the compressed file.

Migrate configuration for capacity profiles

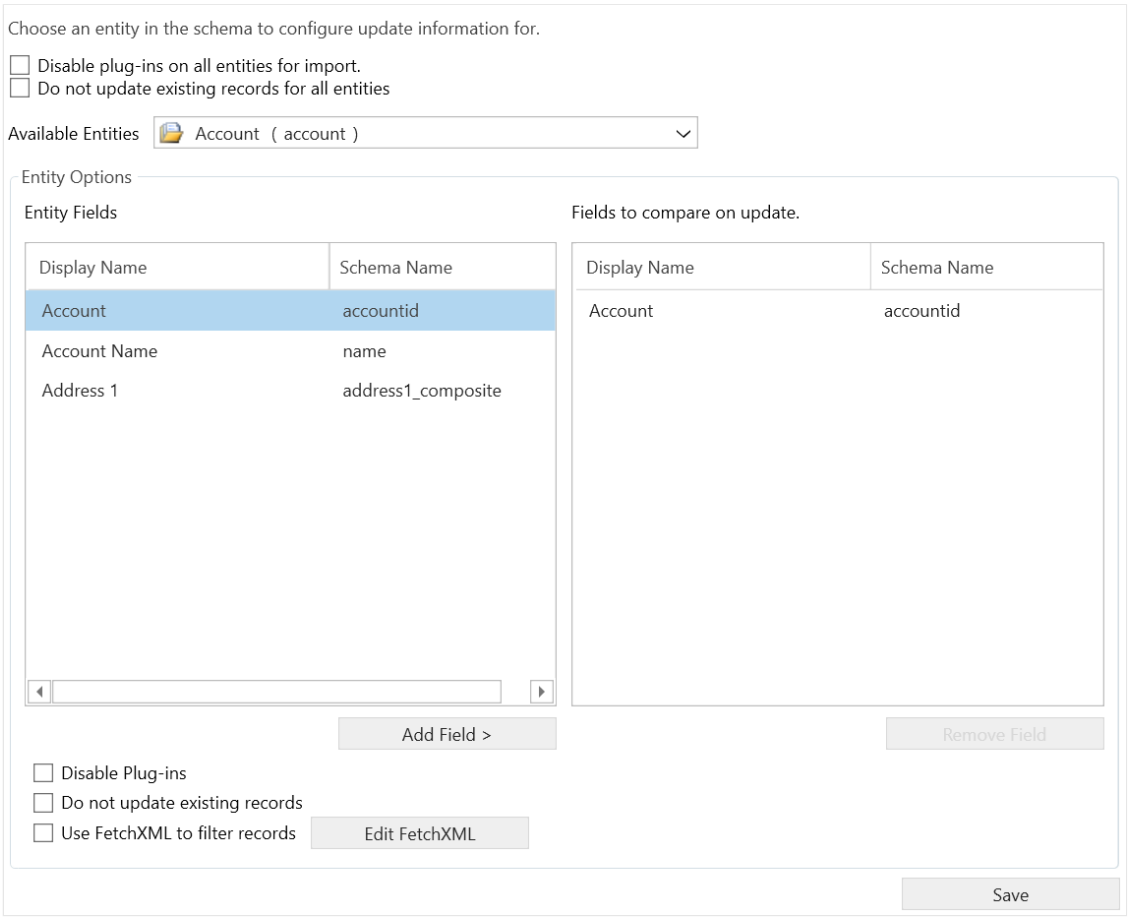
If you have configured capacity profiles in your unified routing setup, perform the steps to migrate the corresponding configuration.

For sample schema to get all the required records, see Sample schema for capacity profiles.

1. Use the Configuration Migration tool to create the schema and export data in source organization for capacity profiles configuration.

   - **Entity display name**: When you create the schema, select the entities in the same sequence as mentioned in the table.
   - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't need to select the out-of-the-box system defined attributes like Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes, if necessary.
   - **Use FetchXML to filter records**: For each entity, use the appropriate FetchXML query that's mentioned in the following table to get single, multiple, or all records based on your requirement. For single or multiple records, you need to use source organization to get the correct name in uiname and GUID in value. If required, you can use the **ADVANCED FIND** menu item to construct the appropriate FetchXML query.
   - **Configure import settings**:

- For the Decision contract entity, ensure that you select the **Do not update existing records** checkbox.
- For every entity, including the Decision contract entity, ensure that you select the primary key field of the entity to be used as a field to compare on update. An example for Account is as follows.



> **Note**
>
> The sample query listed in the following table gets single or multiple records. The query has considered the entity as incident and task. Based on your requirements, ensure that you update the entity logical name in the FetchXML query.

The following table summarizes the entities and corresponding FetchXML samples.

Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records

Capacity Profile (msdyn_capacityprofile)	• Block Assignment (msdyn_blockassignment)
	• Capacity Profile (msdyn_capacityprofileid)
	• Default Max Units (msdyn_defaultmaxunits)
	Name (msdyn_name)
	• Reset Duration(msdyn_resetduration)
	• Unique Name (msdyn_uniquename)
		Sample 1: For all capacity profile records
		`<fetch>`
		`<entity name="msdyn_capacityprofile">`
		`<filter type="and">`
		`<condition attribute="ismanaged"`
		`operator="eq" value="0" />`
		`</filter>`
		`</entity>`
		`</fetch>`
		
		Sample 2: For a single capacity profile record
		`<fetch>`

Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records

		`<entity name="msdyn_capacityprofile">` `<filter type="and">` `<condition attribute="msdyn_capacityprofileid" operator="eq" uiname="Demo Capacity Profile 1" uitype="msdyn_capacityprofile" value="{F57CFE3C-14BD-D53E-F423-A1E7F9749DFB}" />` `</filter>` `</entity>` `</fetch>`
		
		Sample 3: For multiple capacity profile records
		`<fetch>` `<entity name="msdyn_capacityprofile">` `<filter type="and">` `<condition attribute="msdyn_capacityprofileid" operator="in">` `<value uiname="Demo Capacity Profile 1" uitype="msdyn_capacityprofile">{F57CFE3C-14BD-D53E-F423-A1E7F9749DFB}</value>` `<value uiname="Demo Capacity Profile 2" uitype="msdyn_capacityprofile">{D0B8ABFB-4A9F-0B1F-6FF4-8003E29A623C}</value>` `</condition>` `</filter>` `</entity>` `</fetch>`

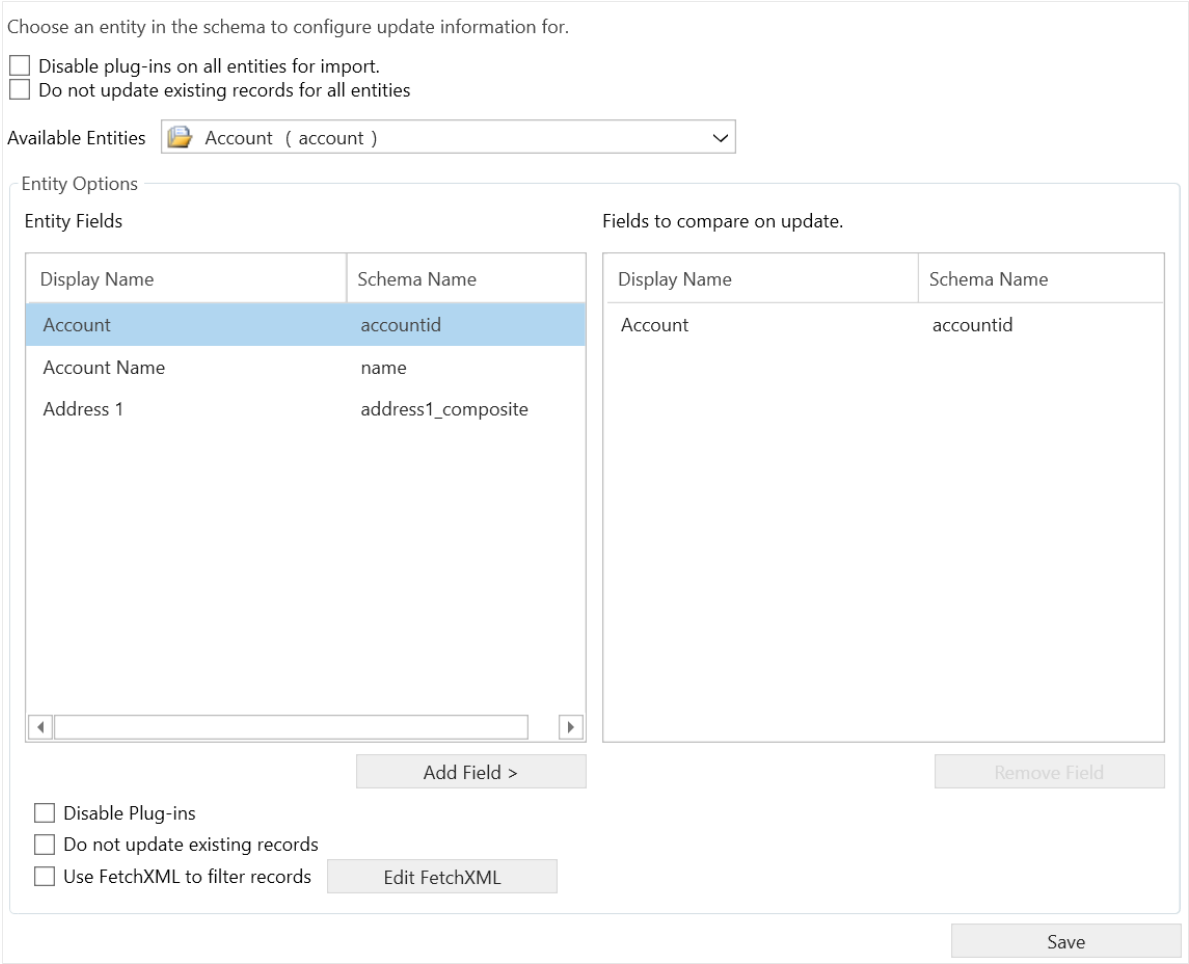
2. Generate the schema and save it.
3. Export the data and generate the compressed (zip) file.
4. Use the Configuration Migration tool, and select the option to import data into the target organization.

Migrate configuration for record queues

Use the Configuration Migration tool to create the schema and export data from the source organization for the record queues configuration.

- **Entity display name**: When you create the schema, select the entities in the same sequence as mentioned in the table.
- **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't need to select the out-of-the-box system defined attributes like Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes, if necessary.
- **Use FetchXML to filter records**: For each entity, use the appropriate FetchXML query that's mentioned in the following table to get single, multiple, or all records based on your requirement. For single or multiple records, you need to use source organization to get the correct name in uiname and GUID in value. If required, you can use the **ADVANCED FIND** menu item to construct the appropriate FetchXML query.
- **Configure import settings**:

- For the Decision contract entity, ensure that you select the **Do not update existing records** checkbox.
- For every entity, including the Decision contract entity, ensure that you select the primary key field of the entity to be used as a field to compare on update. An example for Account is as follows.



> **Note**
>
> The sample query listed in the following table gets single or multiple records. The query has considered the entity as incident and task. Based on your requirements, ensure that you update the entity logical name in the FetchXML query.

If you're using the out-of-the-box assignment methods for queues, such as highest capacity and round robin, skip the following entities:

- Decision rule set
- Assignment configuration
- Assignment configuration step

The assignment rulesets must be available in the system before the Configutation Migration tool imports the selection criteria. Hence, you need to perform the following steps in the specified order to migrate configuration for record queues:

> **Important**
>
> - For every import of queue records, you must either create new queue records or update existing queue records. You must not mix the actions in the same data import.

- When all records in the data.xml of queue entity are for creation, ensure that the following line is present in the schema.xml: `<field displayname="Queue type" name="msdyn_queuetype" type="optionsetvalue" customfield="true"/>` and correspondingly data will also have the field for msdyn_queuetype.
- When all records in the data.xml of queue entity are for update, ensure that you remove the following line in the schema.xml: `<field displayname="Queue type" name="msdyn_queuetype" type="optionsetvalue" customfield="true"/>` and correspondingly data will also not have that field for msdyn_queuetype.
- When the queue that you want to migrate has an overflow condition set, then you must export and import the decision ruleset first. The migration sequence should look as follows:
  - Decision contract
  - Decision ruleset
  - Queue
  - Assignment Configuration
  - Assignment Configuration Step without selection criteria
  - Operating Hour
  - Overflow Action
- You can't migrate the Calendar item associated with the Operating Hour entity. You'll need to set it correctly after you import the Operating Hour entity into the target environment.

Step 1: Export and import rulesets without selection criteria

The following table summarizes the entities and corresponding FetchXML samples.

S. No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
1.	Queue (queue)	• Assignment Input Contract Id (msdyn_assignmentinputcontractid) • Assignment Strategy (msdyn_assignmentstrategy) • Description (description) • Is Default Queue (msdyn_isdefaultqueue) • Is Omnichannel queue (msdyn_isomnichannelqueue) • Name (name) • Priority (msdyn_priority) • Queue (queueid) • Queue type (msdyn_queuetype) • Type (queueviewtype) • Operating Hours (msdyn_operatinghourid) • Prequeue Overflow Ruleset (msdyn_prequeueoverflowrulesetid)	Sample 1: All queues for records Sample 2: Single queue for records Sample 3: Multiple queues for records
2.	Decision contract (msdyn_decisioncontract)	• Contract definition (msdyn_contractdefinition) • Decision contract (msdyn_decisioncontractid) • Name (msdyn_name) • Unique name (msdyn_uniquename)	Sample 1: Decision contract for all record queues Sample 2: Decision contract for a single

S. No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
			Sample 3: Decision contract for multiple record queues
3.	Decision ruleset without selection criteria (msdyn_decisionruleset)	• AI builder model (msdyn_aibmodelid) • Authoring mode (msdyn_authoringmode) • Decision rule set (msdyn_decisionrulesetid) • Description (msdyn_description) • Input contract (msdyn_inputcontractid) • Is input collection (msdyn_isinputcollection) • ML model type (msdyn_mlmodeltype) • Name (msdyn_name) • Output contract (msdyn_outputcontractid) • Rule set definition (msdyn_rulesetdefinition) • Rule set type (msdyn_rulesettype) • Unique name (msdyn_uniquename) • FetchXML for ruleset (msdyn_fetchxml)	Sample 1: Decision ruleset for all record queues without selection criteria defined Sample 2: Decision ruleset for a single record queue without selection criteria defined Sample 3: Decision ruleset for multiple record queues without selection criteria defined
4.	Assignment Configuration (msdyn_assignmentconfiguration)	• Assignment Configuration (msdyn_assignmentconfigurationid) • Description (msdyn_description) • Is Active Configuration (msdyn_isactiveconfiguration) • Name (msdyn_name) • Queue (msdyn_queueid) • Unique Name (msdyn_uniquename)	Sample 1: Assignment configuration for all record queues Sample 2: Assignment configuration for a single record queue Sample 3: Assignment configuration for multiple record queues
5.	Assignment Configuration Step without selection criteria (msdyn_assignmentconfigurationstep)	• Assignment Configuration (msdyn_assignmentconfigurationid) • Assignment Configuration Step (msdyn_assignmentconfigurationstepid) • Is default ruleset (msdyn_isdefaultruleset) • Name (msdyn_name) • Rule Set (msdyn_rulesetid) • Step Order (msdyn_steporder) • Step Type (msdyn_type) • Unique Name (msdyn_uniquename)	Sample 1: Assignment configuration step for all record queues without selection criteria defined Sample 2: Assignment configuration step for a single record queue without selection criteria defined Sample 3: Assignment configuration step

S. No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
			for multiple record queues without selection criteria defined
6.	Operating Hour (msdyn_operatinghour)	• Description (msdyn_description) • Name (msdyn_name) • Operating Hour (msdyn_operatinghourid) • Status (statecode) • Status Reason (statuscode)	Sample 1: Operating Hours for all record queues Sample 2: Operating Hours for a single record queue Sample 3: Operating Hours for multiple record queues
7.	Overflow Action Config(msdyn_overflowactionconfig)	• Name (msdyn_name) • Overflow Action Config (msdyn_overflowactionconfigid) • Overflow Action Data (msdyn_overflowactiondata) • Overflow Action Type(msdyn_overflowactiontype) • Status (statecode) • Status Reason (statuscode)	Sample 1: Overflow Action Config filtered to specific records

Perform the following steps to export and import the rulesets:

1. Generate the schema and save it.
2. Export the data and generate the compressed (zip) file.
3. Extract the zip file, open the data.xml file present in the extracted folder, and do the following:

    - In the source and target organizations, run the following OData API call and note the GUID of `msdyn_decisioncontractid`.

      ```
      https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?
      $select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_assignmentoutput'
      ```

      In data.xml file, replace all the occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

    - In the source and target organizations, run the following OData API call and note the GUID of `msdyn_decisioncontractid`.

      ```
      https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?
      $select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_selectionruleoutput'
      ```

      In data.xml file, replace all occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

- In the source and target organizations, run the following OData API call and note the GUID of msdyn_decisioncontractid. `https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?$select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_queueoverflowrulesetinput'`

  In data.xml file, replace all the occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

- In the source and target organizations, run the following OData API call and note the GUID of msdyn_decisioncontractid.

`https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?$select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_queueoverflowrulesetoutput'`

In data.xml file, replace all occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

4. Package the extracted content again.
5. Use the Configuration Migration tool, select the option to import data, and then select the compressed file.

> **Note**
>
> Set the Calendar Item associated with the Operating Hour entity correctly after you import the Operating Hour entity into the target environment.

For sample schema to get all the required records, see Sample schema for record queues step 1.

Step 2: Export and import rulesets with selection criteria defined

The following table summarizes the entities and corresponding FetchXML samples.

S. No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
1.	Decision ruleset with selection criteria (msdyn_decisionruleset)	• AI builder model (msdyn_aibmodelid) • Authoring mode (msdyn_authoringmode) • Decision rule set (msdyn_decisionrulesetid) • Description (msdyn_description) • Input contract (msdyn_inputcontractid) • Is input collection (msdyn_isinputcollection) • ML model type (msdyn_mlmodeltype) • Name (msdyn_name) • Output contract (msdyn_outputcontractid) • Rule set definition (msdyn_rulesetdefinition) • Rule set type (msdyn_rulesettype) • Unique name (msdyn_uniquename)	Sample 1: Decision ruleset for all record queues with selection criteria defined Sample 2: Decision ruleset for a single record queue with selection criteria defined Sample 3: Decision ruleset for multiple record queues with selection criteria defined

S. No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
2.	Assignment Configuration Step with selection criteria (msdyn_assignmentconfigurationstep)	• Assignment Configuration (msdyn_assignmentconfigurationid) • Assignment Configuration Step (msdyn_assignmentconfigurationstepid) • Is default ruleset (msdyn_isdefaultruleset) • Name (msdyn_name) • Rule Set (msdyn_rulesetid) • Step Order (msdyn_steporder) • Step Type (msdyn_type) • Unique Name (msdyn_uniquename)	Sample 1: Assignment configuration step for all record queues with selection criteria defined Sample 2: Assignment configuration step for a single record queue with selection criteria defined Sample 3: Assignment configuration step for multiple record queues with selection criteria defined

Perform the following steps to export and import the rulesets:

1. Generate the schema and save it.
2. Export the data and generate the compressed (zip) file.
3. Extract the zip file, open the data.xml file present in the extracted folder, and do the following:
    - In the source and target organizations, run the following OData API call and note the GUID of `msdyn_decisioncontractid`.

      ```
      https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?
      $select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_assignmentoutput'
      ```

      In data.xml file, replace all the occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.
    - In the source and target organizations, run the following OData API call and note the GUID of `msdyn_decisioncontractid`.

      ```
      https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?
      $select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_selectionruleoutput'
      ```

      In data.xml file, replace all occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.
4. Package the extracted content again.
5. Use the Configuration Migration tool, select the option to import data, and then select the compressed file.

For sample schema to get all the required records, see Sample schema for record queues step 2 .

FetchXML for queues

Sample 1: All queues for records

XML

```
<fetch>
   <entity name="queue">
    <filter type="and">
      <condition attribute="msdyn_queuetype" operator="eq" value="192350001" />
      <condition attribute="msdyn_isomnichannelqueue" operator="eq" value="1" />
      <condition attribute="queueid" operator="ne" uiname="Default entity queue" uitype="queue"
value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
    </filter>
  </entity>
</fetch>
```

Sample 2: Single queue for records

XML

```
<fetch>
   <entity name="queue">
    <filter type="and">
      <condition attribute="queueid" operator="eq" uiname="Test Record Queue 1" uitype="queue"
value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
    </filter>
   </entity>
</fetch>
```

Sample 3: Multiple queues for records

XML

```
<fetch>
   <entity name="queue">
    <filter type="and">
     <condition attribute="queueid" operator="in">
      <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}
</value>
      <value uiname="Test Record Queue 2" uitype="queue">{B2862B31-3B54-EC11-8F8F-000D3A1CBB9E}
</value>
     </condition>
    </filter>
   </entity>
</fetch>
```

FetchXML for decision contract entity

Sample 1: Decision contract for all record queues

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
```

```
            <filter type="and">
                <condition attribute="msdyn_queuetype" entityname="aw" operator="eq"
value="192350001" />
                <condition attribute="msdyn_isomnichannelqueue" entityname="aw" operator="eq"
value="1" />
                <condition attribute="queueid" entityname="aw" operator="ne"
uiname="Default entity queue" uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_isomnichannelqueue" entityname="be" operator="eq"
value="1" />
                <condition attribute="msdyn_queuetype" entityname="be" operator="eq"
value="192350001" />
                <condition attribute="queueid" entityname="be" operator="ne"
uiname="Default entity queue" uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_isomnichannelqueue" entityname="bm" operator="eq"
value="1" />
                <condition attribute="msdyn_queuetype" entityname="bm" operator="eq"
value="192350001" />
                <condition attribute="queueid" entityname="bm" operator="ne"
uiname="Default entity queue" uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
            </filter>
        </filter>
        <link-entity name="queue" from="msdyn_assignmentinputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="aw"></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bb">
            <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bc">
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="outer"
alias="bd">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="outer" alias="be"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bj">
            <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bk">
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="outer"
alias="bl">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="outer" alias="bm"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Decision contract for a single record queue

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
            <filter type="and">
                <condition attribute="queueid" entityname="aw" operator="eq"
uiname="Test Record Queue 1" uitype="queue" value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
            </filter>
```

```
            <filter type="and">
                <condition attribute="queueid" entityname="be" operator="eq"
uiname="Test Record Queue 1" uitype="queue" value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
            </filter>
            <filter type="and">
                <condition attribute="queueid" entityname="bm" operator="eq"
uiname="Test Record Queue 1" uitype="queue" value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
            </filter>
        </filter>
        <link-entity name="queue" from="msdyn_assignmentinputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="aw"></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bb">
            <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bc">
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="outer"
alias="bd">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="outer" alias="be"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bj">
            <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bk">
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="outer"
alias="bl">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="outer" alias="bm"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Decision contract for multiple record queues

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
            <filter type="and">
                <condition attribute="queueid" entityname="aw" operator="in">
                    <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-3A54-EC11-8F8F-
000D3A1CBB9E}</value>
                    <value uiname="Test Record Queue 2" uitype="queue">{B2862B31-3B54-EC11-8F8F-
000D3A1CBB9E}</value>
                </condition>
            </filter>
            <filter type="and">
                <condition attribute="queueid" entityname="be" operator="in">
                    <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-3A54-EC11-8F8F-
000D3A1CBB9E}</value>
                    <value uiname="Test Record Queue 2" uitype="queue">{B2862B31-3B54-EC11-8F8F-
000D3A1CBB9E}</value>
                </condition>
            </filter>
            <filter type="and">
                <condition attribute="queueid" entityname="bm" operator="in">
                    <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-3A54-EC11-8F8F-
000D3A1CBB9E}</value>
```

```
                    <value uiname="Test Record Queue 2" uitype="queue">{B2862B31-3B54-EC11-8F8F-
000D3A1CBB9E}</value>
                </condition>
            </filter>
        </filter>
        <link-entity name="queue" from="msdyn_assignmentinputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="aw"></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bb">
            <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bc">
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="outer"
alias="bd">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="outer" alias="be"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bj">
            <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bk">
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="outer"
alias="bl">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="outer" alias="bm"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for decision ruleset entity for queues

Sample 1: Decision ruleset for all record queues without selection criteria

XML

```
        <fetch distinct="true">
            <entity name="msdyn_decisionruleset">
                <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="am">
                    <filter>
                        <condition attribute="msdyn_type" operator="ne" value="192350001" />
                    </filter>
                    <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="an">
                        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="ao">
                            <filter type="and">
                                <condition attribute="msdyn_queuetype" operator="eq"
value="192350001" />
                                <condition attribute="msdyn_isomnichannelqueue" operator="eq"
value="1" />
                                <condition attribute="queueid" operator="ne"
uiname="Default entity queue" uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
                            </filter>
                        </link-entity>
                    </link-entity>
                </link-entity>
```

```
            </entity>
        </fetch>
```

Sample 2: Decision ruleset for a single record queue without selection criteria

XML

```
        <fetch distinct="true">
            <entity name="msdyn_decisionruleset">
                <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="am">
                    <filter>
                        <condition attribute="msdyn_type" operator="ne" value="192350001" />
                    </filter>
                    <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="an">
                        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="ao">
                            <filter type="and">
                                <condition attribute="queueid" operator="eq"
uiname="Test Record Queue 1" uitype="queue" value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
                            </filter>
                        </link-entity>
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

Sample 3: Decision ruleset for multiple record queues without selection criteria

XML

```
        <fetch distinct="true">
            <entity name="msdyn_decisionruleset">
                <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="am">
                    <filter>
                        <condition attribute="msdyn_type" operator="ne" value="192350001" />
                    </filter>
                    <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="an">
                        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="ao">
                            <filter type="and">
                                <condition attribute="queueid" operator="in">
                                    <value uiname="Test Record Queue 1" uitype="queue">
{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}</value>
                                    <value uiname="Test Record Queue 2" uitype="queue">
{B2862B31-3B54-EC11-8F8F-000D3A1CBB9E}</value>
                                </condition>
                            </filter>
                        </link-entity>
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

FetchXML for assignment configuration entity

Sample 1: Assignment configuration for all record queues

XML

```
<fetch>
    <entity name="msdyn_assignmentconfiguration">
        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-type="inner"
alias="bi">
            <filter type="and">
                <condition attribute="msdyn_queuetype" operator="eq" value="192350001" />
                <condition attribute="msdyn_isomnichannelqueue" operator="eq" value="1" />
                <condition attribute="queueid" operator="ne" uiname="Default entity queue"
uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Assignment configuration for a single record queue

XML

```
<fetch>
    <entity name="msdyn_assignmentconfiguration">
        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-type="inner"
alias="bi">
            <filter type="and">
                <condition attribute="queueid" operator="eq" uiname="Test Record Queue 1"
uitype="queue" value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Assignment configuration for multiple record queues

XML

```
<fetch>
    <entity name="msdyn_assignmentconfiguration">
        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-type="inner"
alias="bi">
            <filter type="and">
                <condition attribute="queueid" operator="in">
                    <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-3A54-EC11-8F8F-
000D3A1CBB9E}</value>
                    <value uiname="Test Record Queue 2" uitype="queue">{B2862B31-3B54-EC11-8F8F-
000D3A1CBB9E}</value>
                </condition>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for assignment configuration step entity

Sample 1: Assignment configuration step for all record queues without selection criteria

XML

```
        <fetch>
            <entity name="msdyn_assignmentconfigurationstep">
                <filter>
                        <condition attribute="msdyn_type" operator="ne" value="192350001" />
                </filter>
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="bq">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="br">
                        <filter type="and">
                            <condition attribute="msdyn_queuetype" operator="eq"
value="192350001" />
                            <condition attribute="msdyn_isomnichannelqueue" operator="eq"
value="1" />
                            <condition attribute="queueid" operator="ne"
uiname="Default entity queue" uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
                        </filter>
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

Sample 2: Assignment configuration step for a single record queue without selection criteria

XML

```
        <fetch>
            <entity name="msdyn_assignmentconfigurationstep">
                <filter>
                        <condition attribute="msdyn_type" operator="ne" value="192350001" />
                </filter>
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="bq">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="br">
                        <filter type="and">
                            <condition attribute="queueid" operator="eq"
uiname="Test Record Queue 1" uitype="queue" value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
                        </filter>
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

Sample 3: Assignment configuration step for multiple record queues without selection criteria

XML

```
        <fetch>
            <entity name="msdyn_assignmentconfigurationstep">
                <filter>
                        <condition attribute="msdyn_type" operator="ne" value="192350001" />
                </filter>
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="bq">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="br">
                        <filter type="and">
                            <condition attribute="queueid" operator="in">
                                <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-
```

```
3A54-EC11-8F8F-000D3A1CBB9E}</value>
                                <value uiname="Test Record Queue 2" uitype="queue">{B2862B31-
3B54-EC11-8F8F-000D3A1CBB9E}</value>
                            </condition>
                        </filter>
                    </link-entity>
                </link-entity>
            </entity>
```

FetchXML for decision ruleset entity for queues

Sample 1: Decision ruleset for all record queues with selection criteria

XML

```
        <fetch distinct="true">
            <entity name="msdyn_decisionruleset">
                <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="am">
                    <filter>
                        <condition attribute="msdyn_type" operator="eq" value="192350001" />
                    </filter>
                    <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="an">
                        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="ao">
                            <filter type="and">
                                <condition attribute="msdyn_queuetype" operator="eq"
value="192350001" />
                                <condition attribute="msdyn_isomnichannelqueue" operator="eq"
value="1" />
                                <condition attribute="queueid" operator="ne"
uiname="Default entity queue" uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
                            </filter>
                        </link-entity>
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

Sample 2: Decision ruleset for a single record queue with selection criteria

XML

```
        <fetch distinct="true">
            <entity name="msdyn_decisionruleset">
                <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="am">
                    <filter>
                        <condition attribute="msdyn_type" operator="eq" value="192350001" />
                    </filter>
                    <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="an">
                        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="ao">
                            <filter type="and">
                                <condition attribute="queueid" operator="eq"
uiname="Test Record Queue 1" uitype="queue" value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
                            </filter>
                        </link-entity>
```

```
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

Sample 3: Decision ruleset for multiple record queues with selection criteria

XML

```
        <fetch distinct="true">
            <entity name="msdyn_decisionruleset">
                <link-entity name="msdyn_assignmentconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="am">
                    <filter>
                        <condition attribute="msdyn_type" operator="eq" value="192350001" />
                    </filter>
                    <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="an">
                        <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="ao">
                            <filter type="and">
                                <condition attribute="queueid" operator="in">
                                    <value uiname="Test Record Queue 1" uitype="queue">
{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}</value>
                                    <value uiname="Test Record Queue 2" uitype="queue">
{B2862B31-3B54-EC11-8F8F-000D3A1CBB9E}</value>
                                </condition>
                            </filter>
                        </link-entity>
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

FetchXML for assignment configuration step entity

Sample 1: Assignment configuration step for all record queues with selection criteria

XML

```
        <fetch>
            <entity name="msdyn_assignmentconfigurationstep">
                <filter>
                        <condition attribute="msdyn_type" operator="eq" value="192350001" />
                </filter>
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="bq">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="br">
                        <filter type="and">
                            <condition attribute="msdyn_queuetype" operator="eq"
value="192350001" />
                            <condition attribute="msdyn_isomnichannelqueue" operator="eq"
value="1" />
                            <condition attribute="queueid" operator="ne"
uiname="Default entity queue" uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}" />
                        </filter>
                    </link-entity>
                </link-entity>
```

```
            </entity>
        </fetch>
```

Sample 2: Assignment configuration step for a single record queue with selection criteria

XML

```
        <fetch>
            <entity name="msdyn_assignmentconfigurationstep">
                <filter>
                        <condition attribute="msdyn_type" operator="eq" value="192350001" />
                </filter>
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="bq">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="br">
                        <filter type="and">
                            <condition attribute="queueid" operator="eq"
uiname="Test Record Queue 1" uitype="queue" value="{A5ED5CAA-3A54-EC11-8F8F-000D3A1CBB9E}" />
                        </filter>
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

Sample 3: Assignment configuration step for multiple record queues with selection criteria

XML

```
        <fetch>
            <entity name="msdyn_assignmentconfigurationstep">
                <filter>
                        <condition attribute="msdyn_type" operator="eq" value="192350001" />
                </filter>
                <link-entity name="msdyn_assignmentconfiguration"
from="msdyn_assignmentconfigurationid" to="msdyn_assignmentconfigurationid" link-type="inner"
alias="bq">
                    <link-entity name="queue" from="queueid" to="msdyn_queueid" link-
type="inner" alias="br">
                        <filter type="and">
                            <condition attribute="queueid" operator="in">
                                <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-
3A54-EC11-8F8F-000D3A1CBB9E}</value>
                                <value uiname="Test Record Queue 2" uitype="queue">{B2862B31-
3B54-EC11-8F8F-000D3A1CBB9E}</value>
                            </condition>
                        </filter>
                    </link-entity>
                </link-entity>
            </entity>
        </fetch>
```

FetchXML for operating hour configuration step entity

Sample 1: Operating Hour configuration step for all record queues

XML

```
XMLCopy
        <fetch>
```

```
            <entity name="msdyn_operatinghour">
                <link-entity name="queue" from="msdyn_operatinghourid"
to="msdyn_operatinghourid" link-type="inner" alias="aa">
                <filter type="and">
                    <condition attribute="msdyn_queuetype" operator="eq" value="192350001"/>
                    <condition attribute="msdyn_isomnichannelqueue" operator="eq" value="1"/>
                    <condition attribute="queueid" operator="ne" uiname="Default entity queue"
uitype="queue" value="{5A4B76B0-DAB5-4717-9743-9490F2F822C6}"/>
                </filter>
             </link-entity>
           </entity>
        </fetch>
```

Sample 2: Operating Hour configuration step for a single record queue

XML

```
XMLCopy
        <fetch>
            <entity name="msdyn_operatinghour">
                <link-entity name="queue" from="msdyn_operatinghourid"
to="msdyn_operatinghourid" link-type="inner" alias="ab">
                <filter type="and">
                    <condition attribute="queueid" operator="in">
                        <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-3A54-EC11-
8F8F-000D3A1CBB9E}</value>
                    </condition>
                </filter>
                </link-entity>
            </entity>
        </fetch>
```

Sample 3: Operating Hour configuration step for multiple record queues

XML

```
XMLCopy
        <fetch>
            <entity name="msdyn_operatinghour">
                <link-entity name="queue" from="msdyn_operatinghourid"
to="msdyn_operatinghourid" link-type="inner" alias="ab">
                <filter type="and">
                    <condition attribute="queueid" operator="in">
                        <value uiname="Test Record Queue 1" uitype="queue">{A5ED5CAA-3A54-EC11-
8F8F-000D3A1CBB9E}</value>
                        <value uiname="Test Record Queue 2" uitype="queue">{B2862B31-3B54-EC11-
8F8F-000D3A1CBB9E}</value>
                    </condition>
                </filter>
                </link-entity>
            </entity>
        </fetch>
```

FetchXML for overflow action configuration step entity

Sample 1: Overflow Action Config configuration step filter for a specific record

XML

```
XMLCopy
<fetch>
```

```
  <entity name="msdyn_overflowactionconfig">
    <filter type="and">
      <condition attribute="msdyn_overflowactionconfigid" operator="eq"
uiname="QueueTransfer_caae99a1-dcc4-ed11-83ff-00224805c003 " uitype="msdyn_overflowactionconfig"
value="{6D49F66F-68F3-ED11-8848-00224805C003}"/>
    </filter>
  </entity>
</fetch>
```

Migrate configuration for intake rules for record routing

Prerequisites

Before you migrate intake rules, check for the following:

- If the target organization doesn't have the intake rules for the record type that you want to import, then remove the msdyn_rulesetdefinition attribute of the msdyn_decisionruleset entity from the data.xml before you import.
- If the target organization has intake rules for the record type with the same GUID, then remove the msdyn_rulesetdefinition attribute of the msdyn_decisionruleset entity from the data.xml before you import.
- If the target organization has intake rules for the record type with different GUID, then delete all the intake rules in the target organization before you import.

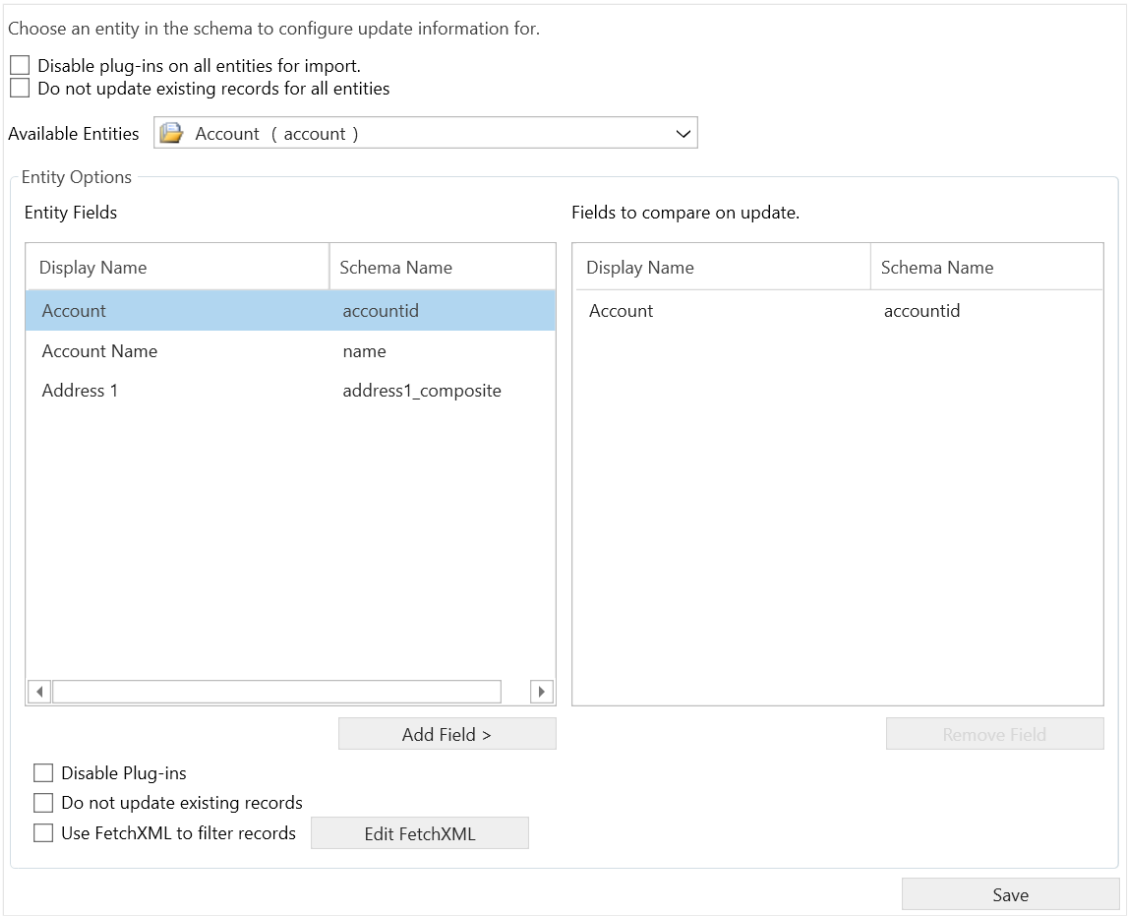
Migrate configuration of intake rules

1. Use the Configuration Migration tool to create the schema and export data from the source organization for a record routing configuration.

    - **Entity display name**: When you create the schema, select the entities in the same sequence as mentioned in the table.
    - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't need to select the out-of-the-box system defined attributes like Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes, if necessary.
    - **Use FetchXML to filter records**: For each entity, use the appropriate FetchXML query that's mentioned in the following table to get single, multiple, or all records based on your requirement. For single or multiple records, you need to use source organization to get the correct name in uiname and GUID in value. If required, you can use the **ADVANCED FIND** menu item to construct the appropriate FetchXML query.
    - **Configure import settings**:

        - For the Decision contract entity, ensure that you select the **Do not update existing records** checkbox.

        - For every entity, including the Decision contract entity, ensure that you select the primary key field of the entity to be used as a field to compare on update. An example for Account is as follows.



> **Note**
>
> The sample query listed in the following table gets single or multiple records. The query has considered the entity as incident and task. Based on your requirements, ensure that you update the entity logical name in the FetchXML query.

The following table summarizes the entities and corresponding FetchXML samples.

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
1.	Master Entity Routing Configuration (msdyn_masterentityroutingconfiguration)	• Entity (msdyn_entitylogicalname) • Master Entity Routing Configuration (msdyn_masterentityroutingconfigurationid) • Name (msdyn_name) • Rule set (msdyn_rulesetid) • Unique Name (msdyn_uniquename)	Sample 1: Master entity routing configuration for a routed records Sample 2: Master entity routing configuration for the incident entity Sample 3: Master entity routing configuration

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
			for the incident and task entities
2.	Decision contract (msdyn_decisioncontract)	• Contract definition (msdyn_contractdefinition) • Decision contract (msdyn_decisioncontractid) • Name (msdyn_name) • Unique name (msdyn_uniquename)	Sample 1: Decision contract for all routed records Sample 2: Decision contract for the incident entity Sample 3: Decision contract for the incident and task entities
3.	Decision ruleset (msdyn_decisionruleset)	• AI builder model (msdyn_aibmodelid) • Authoring mode (msdyn_authoringmode) • Decision rule set (msdyn_decisionrulesetid) • Description (msdyn_description) • Input contract (msdyn_inputcontractid) • Is input collection (msdyn_isinputcollection) • ML model type (msdyn_mlmodeltype) • Name (msdyn_name) • Output contract (msdyn_outputcontractid) • Rule set definition (msdyn_rulesetdefinition) • Rule set type (msdyn_rulesettype) • Unique name (msdyn_uniquename)	Sample 1: Decision ruleset for all rouced records Sample 2: Decision ruleset for the incident entity Sample 3: Decision ruleset for the incident and task entities

2. Generate the schema and save it.

3. Export the data and generate the compressed (zip) file.

4. Extract the zip file, open the data.xml file present in the extracted folder, and perform the following operations:

   - In the source and target organizations, run the following OData API call and note the `msdyn_decisioncontractid`:

     ```
     https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?
     $select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq
     ```

`'msdyn_baseoutputcontractmasterentityroutingconfiguration'`

In data.xml file, replace all occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

- In the source and target organizations, run the following OData API call and note the `msdyn_decisioncontractid`:

  `https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?$select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_baseoutputcontractmasterentityroutingconfigurationunifiedrouting'`

  In data.xml file, replace all occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

5. Package the extracted content again.
6. Use the Configuration Migration tool, select the option to import data, and then select the compressed file.

For sample schema to get all the required records, see Sample schema for intake rules for record routing.

FetchXML for decision contract entity for intake rules

Sample 1: Decision contract for all routed records

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bp" operator="not-
null" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bt" operator="not-
null" />
            </filter>
        </filter>
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bo">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" linktype="outer" alias="bp" /></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bs">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" linktype="outer" alias="bt" /></link-entity>
    </entity>
</fetch>
```

Sample 2: Decision contract for the incident entity

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
            <filter type="and">
```

```
                <condition attribute="msdyn_entitylogicalname" entityname="bp" operator="eq"
value="incident" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bt" operator="eq"
value="incident" />
            </filter>
        </filter>
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bo">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bp" /></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bs">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bt" /></link-entity>
    </entity>
</fetch>
```

Sample 3: Decision Contract for the incident and task entities

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bp" operator="eq"
value="incident" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bt" operator="eq"
value="incident" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bp" operator="eq"
value="task" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bt" operator="eq"
value="task" />
            </filter>
        </filter>
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bo">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bp" /></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bs">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bt" /></link-entity>
    </entity>
</fetch>
```

FetchXML for decision ruleset entity for intake rules

Sample 1: Decision ruleset for all routed records

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisionruleset">
```

```
        <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="cp">
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" operator="not-null" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Decision ruleset for the incident entity

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisionruleset">
        <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="cp">
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" operator="eq" value="incident" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Decision ruleset for the incident and task entities

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisionruleset">
        <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="inner" alias="cp">
            <filter type="and">
                <filter type="or">
                    <condition attribute="msdyn_entitylogicalname" operator="eq"
value="incident" />
                    <condition attribute="msdyn_entitylogicalname" operator="eq" value="task" />
                </filter>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for entity routing configuration for intake rules

Sample 1: Master entity routing configuration for a routed records

XML

```
<fetch>
    <entity name="msdyn_masterentityroutingconfiguration">
        <filter type="and">
            <condition attribute="msdyn_entitylogicalname" operator="not-null" />
        </filter>
    </entity>
</fetch>
```

Sample 2: Master entity routing configuration for the incident entity

XML

```
<fetch>
    <entity name="msdyn_masterentityroutingconfiguration">
        <filter type="and">
            <condition attribute="msdyn_entitylogicalname" operator="eq" value="incident" />
        </filter>
    </entity>
</fetch>
```

Sample 3: Master entity routing configuration for the incident and task entities

XML

```
<fetch>
    <entity name="msdyn_masterentityroutingconfiguration">
        <filter type="and">
            <filter type="or">
                <condition attribute="msdyn_entitylogicalname" operator="eq" value="incident" />
                <condition attribute="msdyn_entitylogicalname" operator="eq" value="task" />
            </filter>
        </filter>
    </entity>
</fetch>
```

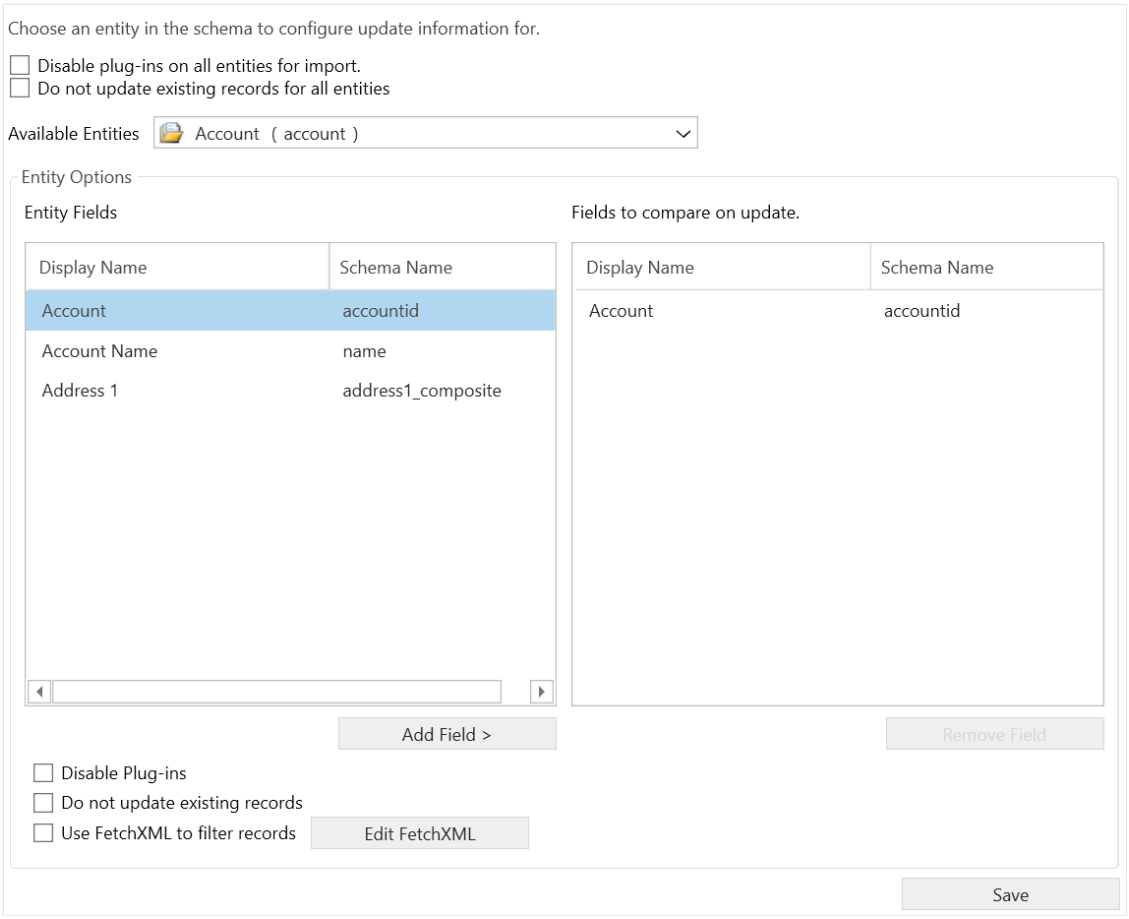
Migrate configuration for record workstreams

1. Use the Configuration Migration tool to create the schema and export data from the source organization for record workstreams.

    - **Entity display name**: When you create the schema, select the entities in the same sequence as mentioned in the table.
    - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't need to select the out-of-the-box system defined attributes like Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes, if necessary.
    - **Use FetchXML to filter records**: For each entity, use the appropriate FetchXML query that's mentioned in the following table to get single, multiple, or all records based on your requirement. For single or multiple records, you need to use source organization to get the correct name in uiname and GUID in value. If required, you can use the **ADVANCED FIND** menu item to construct the appropriate FetchXML query.
    - **Configure import settings**:

        - For the Decision contract entity, ensure that you select the **Do not update existing records** checkbox.

        - For every entity, including the Decision contract entity, ensure that you select the primary key field of the entity to be used as a field to compare on update. An example for Account is as follows.



> **Note**
>
> The sample query listed in the following table gets single or multiple records. The query has considered the entity as incident and task. Based on your requirements, ensure that you update the entity logical name in the FetchXML query.

Make sure that the workstreams that're referred in the intake rules exist in the target organization or are present as part of the current migration.

The following table summarizes the entities and corresponding FetchXML samples.

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
1.	Workstream (msdyn_liveworkstream)	• Allow Automated Messages (msdyn_enableautomatedmessages) • Allowed Presences (msdyn_allowedpresences) • Assign WorkItem After Decline or Timeout (msdyn_assignworkitemafterdecline) • Auto-close after inactivity (msdyn_autocloseafterinactivity) • Block capacity for wrap up state (msdyn_blockcapacityforwrapup) • Bot queue (msdyn_bot_queue) • Bot rule (msdyn_bot_rule) • Bot user (msdyn_bot_user) • Capacity (msdyn_capacityrequired) • Capacity format (msdyn_capacityformat) • Channel (msdyn_streamsource)	Sample 1: All record workstreams Sample 2: Single record workstream Sample 3: Multiple record workstreams

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
		• Contract Id (msdyn_routingcontractid) • Default (msdyn_sessiontemplate_default) • Default Queue (msdyn_defaultqueue) • Direction (msdyn_direction) • Enable selecting from push-based work streams (msdyn_enableselectingfrompushbasedworkstreams) • Entity (msdyn_masterentityroutingconfigurationid) • FallBack Language (msdyn_fallbacklanguage) • Follow-up after waiting (msdyn_followupafterwaiting) • Handling Time Threshold (msdyn_handlingtimethreshold) • Incoming authenticated (msdyn_notificationtemplate_incoming_auth) • Is Default (msdyn_isdefault) • Keep same agent for entire conversation (msdyn_enableagentaffinity) • Matching Logic (msdyn_matchinglogic) • Max Concurrency (msdyn_maxconcurrentconnection) • Mode (msdyn_mode) • Name (msdyn_name) • Notification (msdyn_notification) • Outbound queue (msdyn_outboundqueueid) • Record Identification Rule (msdyn_recordidentificationrule) • Record Identification Validation Rule (msdyn_recordidentificationvalidationrule) • Screen pop timeout (msdyn_screenpoptimeout) • Screen pop timeout (msdyn_screenpoptimeout_optionSet) • Skill Attachment Rules Count (msdyn_skillattachmentrulescount) • Skill Attachment Rules Count (Last Updated On) (msdyn_skillattachmentrulescount_date) • Skill Attachment Rules Count (State) (msdyn_skillattachmentrulescount_state) • Waiting Time Threshold (msdyn_waitingtimethreshold) • Work Distribution Mode (msdyn_workdistributionmode) • Work Stream (msdyn_liveworkstreamid)	
2.	Decision contract (msdyn_decisioncontract)	• Contract definition (msdyn_contractdefinition) • Decision contract (msdyn_decisioncontractid) • Name (msdyn_name) • Unique name (msdyn_uniquename)	Sample 1: Decision contract for all record workstreams Sample 2: Decision contract for a single record workstream of type = incident

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
			Sample 3: Decision contract for multiple record workstreams of type = incident and type = task
3.	Decision rule set (msdyn_decisionruleset)	• AI builder model (msdyn_aibmodelid) • Authoring mode (msdyn_authoringmode) • Decision rule set (msdyn_decisionrulesetid) • Description (msdyn_description) • Input contract (msdyn_inputcontractid) • Is input collection (msdyn_isinputcollection) • ML model type (msdyn_mlmodeltype) • Name (msdyn_name) • Output contract (msdyn_outputcontractid) • Rule set definition (msdyn_rulesetdefinition) • Rule set type (msdyn_rulesettype) • Unique name (msdyn_uniquename)	Sample 1: Decision ruleset for all record workstreams Sample 2: Decision ruleset for a single record workstream of type = incident Sample 3: Decision ruleset for multiple record workstreams type = incident and type = task
4.	Routing configuration (msdyn_routingconfiguration)	• Is active configuration (msdyn_isactiveconfiguration) • Name (msdyn_name) • Routing configuration (msdyn_routingconfigurationid) • Unique name (msdyn_uniquename) • Workstream (msdyn_liveworkstreamid)	Sample 1: Routing configuration for all record workstreams Sample 2: Routing configuration for a single record workstream Sample 3: Routing configuration for multiple record

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
			workstreams
5.	Routing configuration step (msdyn_routingconfigurationstep)	• Name (msdyn_name) • Routing configuration (msdyn_routingconfigurationid) • Routing configuration step (msdyn_routingconfigurationstepid) • Rule set (msdyn_rulesetid) • Step order (msdyn_steporder) • Step type (msdyn_type) • Unique name (msdyn_uniquename)	Sample 1: Routing configuration step for all record workstreams Sample 2: Routing configuration step for a single record workstream Sample 3: Routing configuration step for multiple record workstreams
6.	Workstream capacity profile (msdyn_liveworkstreamcapacityprofile)	• Capacity Profile (msdyn_capacityprofile_id) • Name (msdyn_name) • Workstream (msdyn_workstream_id) • Workstream Capacity profile (msdyn_liveworkstreamcapacityprofileid)	Sample 1: Workstream capacity profile for all record workstreams Sample 2: Workstream capacity profile for a single record workstream Sample 3: Workstream capacity profile for multiple record workstreams

2. Generate the schema and save it.

3. Export the data and generate the compressed (zip) file.

4. Extract the zip file, open the data.xml file present in the extracted folder, and perform the following operations:

- In the source and target organizations, run the following OData API call and note the `msdyn_decisioncontractid`.

  `https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?$select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_baseoutputcontractmasterentityroutingconfiguration'`

  In data.xml file, replace all occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

- In the source and target organizations, run the following OData API call and note the `msdyn_decisioncontractid`.

  `https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?$select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_baseoutputcontractmasterentityroutingconfigurationunifiedrouting'`

  In data.xml file, replace all occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

- In the source and target organizations, run the following OData API call and note the `msdyn_decisioncontractid`.

  `https://<OrgURL>/api/data/v9.1/msdyn_decisioncontracts?$select=msdyn_decisioncontractid&$filter=msdyn_uniquename eq 'msdyn_demandqueueidentificationoutput'`

  In data.xml file, replace all occurrences of the msdyn_decisioncontractid GUID in the source organization with the msdyn_decisioncontractid GUID of the target organization.

5. Package the extracted content again.
6. Use the Configuration Migration tool, select the option to import data, and select the compressed file.
7. After the import completes successfully, run the import again to ensure references are updated correctly that might have been overridden by the "on create" processes.

For sample schema to get all the required records, see Sample schema for unified routing record workstream.

FetchXML for workstream entity

Sample 1: All record workstreams

XML

```
<fetch distinct="true">
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_mode" operator="eq" value="717210001" />
            <condition attribute="msdyn_streamsource" operator="eq" value="192350000" />
        </filter>
    </entity>
</fetch>
```

Sample 2: Single record workstream

XML

```
<fetch>
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_liveworkstreamid" operator="eq"
uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-
7E3E-59A7F0312EFC}" />
        </filter>
    </entity>
</fetch>
```

Sample 3: Multiple record workstreams

XML

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_liveworkstreamid" operator="in">
                <value uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream">
{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}</value>
                <value uiname="Test Record Workstream Task 1" uitype="msdyn_liveworkstream">
{E6246229-33AC-5A9E-2FFE-51668AD44215}</value>
            </condition>
        </filter>
    </entity>
</fetch>
```

FetchXML for decision contract entity

Sample 1: Decision contract for all record workstreams

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
            <filter type="and">
                <condition attribute="msdyn_mode" entityname="an" operator="eq"
value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="an" operator="eq"
value="192350000" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_mode" entityname="bd" operator="eq"
value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="bd" operator="eq"
value="192350000" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bp" operator="not-
null" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bt" operator="not-
null" />
            </filter>
        </filter>
```

```
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an"></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba">
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb">
                <link-entity name="msdyn_routingconfiguration"
from="msdyn_routingconfigurationid" to="msdyn_routingconfigurationid" link-type="outer"
alias="bc">
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bo">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bp" /></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bs">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bt" /></link-entity>
    </entity>
</fetch>
```

Sample 2: Decision contract for a single record workstream of type = incident

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq"
uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-
7E3E-59A7F0312EFC}" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq"
uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-
7E3E-59A7F0312EFC}" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bp" operator="eq"
value="incident" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bt" operator="eq"
value="incident" />
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an"></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba">
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb">
                <link-entity name="msdyn_routingconfiguration"
from="msdyn_routingconfigurationid" to="msdyn_routingconfigurationid" link-type="outer"
alias="bc">
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
```

```
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bo">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bp" /></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bs">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bt" /></link-entity>
    </entity>
</fetch>
```

Sample 3: Decision contract for multiple record workstreams of type = incident and type = task

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisioncontract">
        <filter type="or">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="in">
                    <value uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream">
{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}</value>
                    <value uiname="Test Record Workstream Task 1" uitype="msdyn_liveworkstream">
{E6246229-33AC-5A9E-2FFE-51668AD44215}</value>
                </condition>
            </filter>
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="in">
                    <value uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream">
{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}</value>
                    <value uiname="Test Record Workstream Task 1" uitype="msdyn_liveworkstream">
{E6246229-33AC-5A9E-2FFE-51668AD44215}</value>
                </condition>
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bp" operator="eq"
value="incident" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bt" operator="eq"
value="incident" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bp" operator="eq"
value="task" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="bt" operator="eq"
value="task" />
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an"></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba">
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb">
                <link-entity name="msdyn_routingconfiguration"
from="msdyn_routingconfigurationid" to="msdyn_routingconfigurationid" link-type="outer"
alias="bc">
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd"></link-entity>
                </link-entity>
            </link-entity>
        </link-entity>
```

```
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bo">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bp" /></link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bs">
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bt" /></link-entity>
    </entity>
</fetch>
```

FetchXML for decision ruleset entity

Sample 1: Decision ruleset for all record workstreams

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisionruleset">
        <filter type="or">
            <filter type="and">
                <condition attribute="msdyn_mode" entityname="af" operator="eq"
value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="af" operator="eq"
value="192350000" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="dc" operator="not-
null" />
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad">
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae">
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af"></link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="dc"></link-entity>
    </entity>
</fetch>
```

Sample 2: Decision ruleset for a single record workstream of type = incident

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisionruleset">
        <filter type="or">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq"
uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-
7E3E-59A7F0312EFC}" />
            </filter>
            <filter type="and">
                <condition attribute="msdyn_entitylogicalname" entityname="dc" operator="eq"
value="incident" />
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
```

```
to="msdyn_decisionrulesetid" link-type="outer" alias="ad">
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae">
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af"></link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="dc"></link-entity>
    </entity>
</fetch>
```

Sample 3: Decision ruleset for multiple record workstreams type = incident and type = task

XML

```
<fetch distinct="true">
    <entity name="msdyn_decisionruleset">
        <filter type="or">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="in">
                    <value uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream">
{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}</value>
                    <value uiname="Test Record Workstream Task 1" uitype="msdyn_liveworkstream">
{E6246229-33AC-5A9E-2FFE-51668AD44215}</value>
                </condition>
            </filter>
            <filter type="and">
                <filter type="or">
                    <condition attribute="msdyn_entitylogicalname" entityname="dc" operator="eq"
value="incident" />
                    <condition attribute="msdyn_entitylogicalname" entityname="dc" operator="eq"
value="task" />
                </filter>
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad">
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae">
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af"></link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="dc"></link-entity>
    </entity>
</fetch>
```

FetchXML for routing configuration entity

Sample 1: Routing configuration for all record workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" operator="eq" value="192350000" />
```

```
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Routing configuration for a single record workstream

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="eq"
uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-
7E3E-59A7F0312EFC}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Routing configuration for multiple record workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="in">
                    <value uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream">
{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}</value>
                    <value uiname="Test Record Workstream Task 1" uitype="msdyn_liveworkstream">
{E6246229-33AC-5A9E-2FFE-51668AD44215}</value>
                </condition>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for routing configuration step entity

Sample 1: Routing configuration step for all record workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
                <filter type="and">
                    <condition attribute="msdyn_mode" operator="eq" value="717210001" />
                    <condition attribute="msdyn_streamsource" operator="eq" value="192350000" />
                </filter>
            </link-entity>
        </link-entity>
```

```
    </entity>
</fetch>
```

Sample 2: Routing configuration step for a single record workstream

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
                <filter type="and">
                    <condition attribute="msdyn_liveworkstreamid" operator="eq"
uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-
7E3E-59A7F0312EFC}" />
                </filter>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Routing configuration step for multiple record workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
                <filter type="and">
                    <condition attribute="msdyn_liveworkstreamid" operator="in">
                        <value uiname="Test Record Workstream Case 1"
uitype="msdyn_liveworkstream">{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}</value>
                        <value uiname="Test Record Workstream Task 1"
uitype="msdyn_liveworkstream">{E6246229-33AC-5A9E-2FFE-51668AD44215}</value>
                    </condition>
                </filter>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for workstream capacity profile entity

Sample 1: Workstream capacity profile for all record workstreams

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_workstream_id" link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" operator="eq" value="192350000" />
            </filter>
        </link-entity>
```

```
    </entity>
</fetch>
```

Sample 2: Workstream capacity profile for a single record workstream

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_workstream_id" link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="eq"
uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-
7E3E-59A7F0312EFC}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Workstream capacity profile for multiple record workstreams

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_workstream_id" link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="in">
                    <value uiname="Test Record Workstream Case 1" uitype="msdyn_liveworkstream">
{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}</value>
                    <value uiname="Test Record Workstream Task 1" uitype="msdyn_liveworkstream">
{E6246229-33AC-5A9E-2FFE-51668AD44215}</value>
                </condition>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Next steps

Verify migration of records

See also

Create a schema to export configuration data
Overview of data migration for records
Use FetchXML query to filter records
Troubleshoot migration of records
Migrate configuration data for live chat
Migrate configuration data for voice channel

Verify migration of records

Article • 12/20/2022

After you've successfully migrated the configuration data related to unified routing from the source to target organization, do the following in your target organization:

1. Ensure that the unified routing configuration and rulesets are rendered properly as in the source organization.

2. If skills and rating values are used in unified routing rulesets, then you must manually link, associate, or create users, bookable resources, and bookable resources characteristics records.

3. If capacity profiles are used in rulesets and workstreams for unified routing, then you must manually link, associate, or create users, bookable resources, and bookable resources capacity profile records.

Next steps

Troubleshoot migration of records

See also

Create a schema to export configuration data
Overview of data migration for records
Use FetchXML query to filter records
Migrate configuration data for records
Troubleshoot migration of records
Migrate configuration data for live chat
Migrate configuration data for voice channel

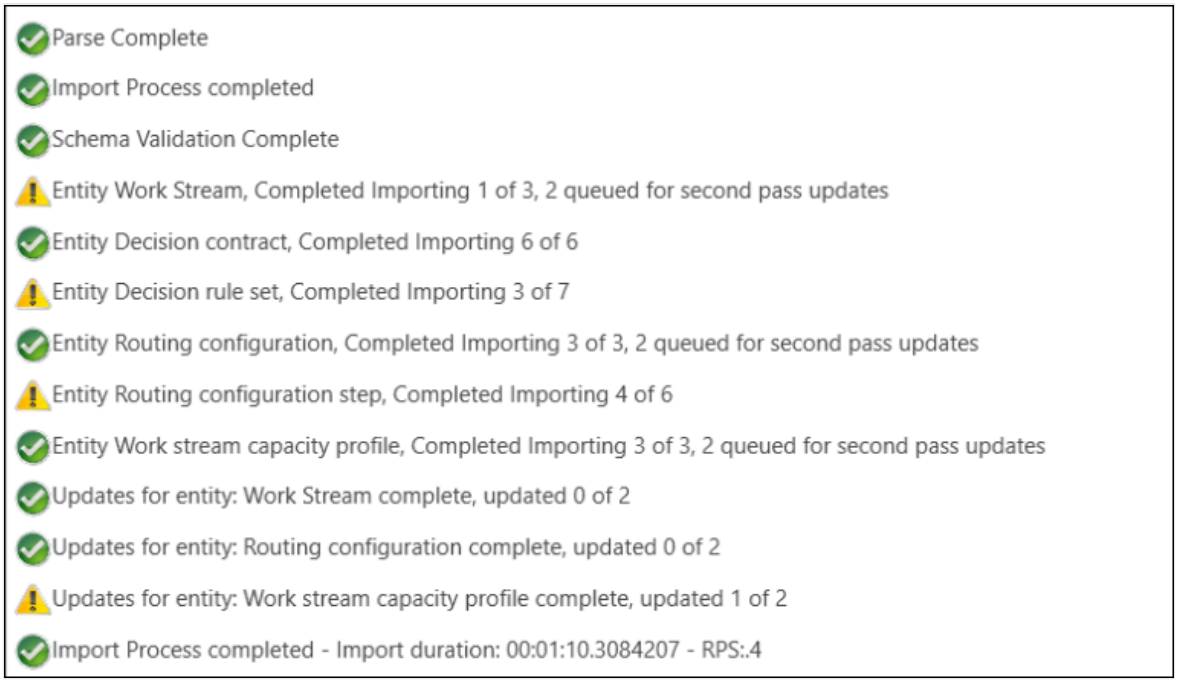
Troubleshoot migration of records

Article • 12/20/2022

To troubleshoot any issues that you might face during migration, check the log files as follows:

- When you import data into the target organization, if you see yellow warning symbols, then check the following logs in the Configuration Migration tool:
  - **Login_ErrorLog.log**: Provides information about any issues you had when you signed in to the organization using the Configuration Management tool.
  - **DataMigrationUtility.log**: Provides information about the tasks performed using the tool during the last migration.
  - **ImportDataDetail.log**: Provides information about the data imported by the tool in the last data import.

  More information: Troubleshoot configuration data migration issues using log files

- If the logs contain network errors, then repeat the import process.

  Here's an example:

```
Time: 11:46:09 PM
Error: There was no endpoint listening at
`https://www.contoso.com/XRMServices/2011/Organization.svc/web?
SDKClientVersion=9.2.46.5279` that could accept the message. This is
often caused by an incorrect address or SOAP action. See
```

```
InnerException, if present, for more details.
Stack Trace: Service stack trace:
```

Revert unmanaged records

If you see a difference in the migrated records between the source and target organizations, then you must delete the unmanaged entity records and repeat the migration process. In the target organization, perform the following steps:

1. For queues, revert the entities in the reverse order of the serial number (**S.No** column) that's listed in the migration article at Migrate configuration for record queues. Migrate the entities in this order:
   a. Assignment Configuration Step
   b. Assignment Configuration
   c. Decision ruleset
   d. Decision contract
   e. Queue

2. For workstreams, revert the entities in the reverse order of their serial number (**S.No** column) that's listed in the migration article at Migrate configuration for record workstreams. Migrate the entities in this order:
   a. Workstream capacity profile
   b. Routing configuration step
   c. Routing configuration
   d. Decision ruleset
   e. Decision contract
   f. Workstream

   For intake rules, revert the entities in the reverse order of their serial number (**S.No** column) that's listed in the migration article at Migrate configuration for intake rules. Migrate the entities in this order:
   a. Master Entity Routing Configuration
   b. Decision ruleset
   c. Decision contract

Next steps

1. Migrate queues
2. Migrate intake rules
3. Migrate workstreams

See also

Create a schema to export configuration data
Overview of data migration for records
Use FetchXML query to filter records
Migrate configuration data for records
Verify migration of records
Migrate configuration data for live chat
Migrate configuration data for voice channel

Migrate data for the live chat channel

Article • 09/18/2023

Use the Configuration Migration tool to migrate the configurations from the source organization to the target organization for live chat.

For information on how to use the Configuration Migration tool, see the following articles:

- Download Configuration Migration tool
- How the Configuration Migration tool works

Prerequisites

The following prerequisites must be met:

- In the source organization, if a unified routing ruleset refers to the following, then ensure that they exist in the target organization before you proceed with the migration:
  - Custom entities
  - Attributes
  - Relationships
  - Option sets
  - Lookup values
- Ensure that the user who performs the migration has the required privileges on the following unified routing entities in the source and target organizations:
  - Workstream (`msdyn_liveworkstream`)
  - Channel configuration (`msdyn_omnichannelconfiguration`)
  - Operating hours (`msdyn_operatinghour`)
  - Characteristic (`characteristic`)
  - Rating Model (`rating model`)
  - Rating Value (`ratingvalue`)
  - Capacity Profile (`msdyn_capacityprofile`)
  - Queue (`queue`)
  - Decision contract (`msdyn_decisioncontract`)
  - Decision ruleset (`msdyn_decisionruleset`)
  - Assignment configuration (`msdyn_assignmentconfiguration`)
  - Assignment configuration Step (`msdyn_assignmentconfigurationstep`)
  - Routing configuration (`msdyn_routingconfiguration`)
  - Routing configuration step (`msdyn_routingconfigurationstep`)
  - Workstream capacity profile (`msdyn_liveworkstreamcapacityprofile`)
  - Context variable (`msdyn_ocliveworkstreamcontextvariable`)
  - Survey question (`msdyn_surveyquestions`)
  - Survey question sequence (`msdyn_questionsequence`)
  - Survey answer option (`msdyn_chatansweroption`)
  - Quick replies (`msdyn_cannedmessages`)
  - Tags (`msdyn_octags`)

> **Important**
>
> The migration of the account, channel, bot configuration, and AI and analytics settings is not in scope.

Migrate live chat configuration

You must perform the steps in the order they're listed to migrate your configuration data successfully. Use the information in the tables and refer to the corresponding sample schemas for each configuration.

1. Migrate configuration using a solution
2. Migrate configuration for skill-based routing
3. Migrate configuration for capacity profiles
4. Migrate configuration for live chat queues
5. Migrate configuration for live chat workstreams
6. Migrate configuration for live chat widgets
7. Verify your migration
8. Troubleshoot migration of data

Migrate configuration using a solution

If you use custom session templates and notifications in your live chat routing setup, perform the steps outlined in Migrate configuration using a solution.

Migrate skill-based configuration

If skill-based routing rulesets are used in your unified routing setup, perform the steps outlined in Export and import data for skill-based routing. Make sure to adjust any filtering fetch xml appropriately for live chat.

Migrate configuration for capacity profiles

If you have configured capacity profiles in your unified routing setup, perform the steps outlined in Export and import data for capacity profiles. Make sure to adjust any filtering fetch xml appropriately for live chat.

Migrate configuration for live chat queues

For migrating queues for live chat, perform the steps outlined in Migrate data for unified routing-based record queues. Make sure to adjust any filtering fetch xml appropriately for live chat.

Migrate configuration for live chat workstreams

1. Use the Configuration Migration tool to create the schema and migrate the data from the source organization for the record workstream.

    - **Entity display name**: When you create the schema, select the entities in the same sequence as mentioned in the table.
    - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't need to select the out-of-the-box system defined attributes like Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes, if necessary.
    - **Use FetchXML to filter records**: For each entity, use the appropriate FetchXML query that's mentioned in the following table to get single, multiple, or all records based on your requirement. For single or multiple records, you need to use source organization to get the correct name in uiname and GUID in value. If required, you can use the ADVANCED FIND menu item to construct the appropriate FetchXML query.
    - **Configure import settings**: For the Decision contract entity, ensure that you select the **Do not update existing records** checkbox.

2. Make sure that the workstreams that're referred in the configuration of the live chat widgets are include in the migration.

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
1.	Workstream (msdyn_liveworkstream)	• API Key (msdyn_apikey) • API Key Version Number (msdyn_apikeyversionnumber) • Allow Automated Messages (msdyn_enableautomatedmessages) • Allowed Presences (msdyn_allowedpresences) • Assign WorkItem After Decline or Timeout (msdyn_assignworkitemafterdecline) • Auto-close after inactivity (msdyn_autocloseafterinactivity) • Block capacity for wrap up state (msdyn_blockcapacityforwrapup) • Bot queue (msdyn_bot_queue) • Bot rule (msdyn_bot_rule) • Bot user (msdyn_bot_user) • CallbackPreviewDialing (msdyn_notificationtemplate_callback_previewdialing) • Connectors (msdyn_connectorsurl) • Consult (msdyn_notificationtemplate_consult) • Conversation mode of chat channels (msdyn_conversationmode) • Customer ID (msdyn_customerid) • Customer Disconnect Hold Duration For Open Conversation (msdyn_customerdisconnectholddurationforopenconversation) • Capacity (msdyn_capacityrequired) • Capacity format (msdyn_capacityformat) • Channel (msdyn_streamsource) • Contract Id (msdyn_routingcontractid) • Default (msdyn_sessiontemplate_default) • Default Queue (msdyn_defaultqueue) • Direction (msdyn_direction) • Enable selecting from push-based work streams (msdyn_enableselectingfrompushbasedworkstreams) • Entity (msdyn_masterentityroutingconfigurationid) • FallBack Language (msdyn_fallbacklanguage) • Follow-up after waiting (msdyn_followupafterwaiting) • Handling Time Threshold (msdyn_handlingtimethreshold) • Incoming authenticated (msdyn_notificationtemplate_incoming_auth) • Incoming unauthenticated (msdyn_notificationtemplate_incoming_unauth) • Is Default (msdyn_isdefault) • Keep same agent for entire conversation (msdyn_enableagentaffinity) • Last Validation On (msdyn_lastvalidationon) • Last Validation Status (msdyn_lastvalidationstatus) • Matching Logic (msdyn_matchinglogic) • Max Concurrency (msdyn_maxconcurrentconnection) • Mode (msdyn_mode) • Name (msdyn_name) • Notification (msdyn_notification) • Notification scenario placeholder (msdyn_notificationscenarioplaceholder) • Outbound queue (msdyn_outboundqueueid) • Record Identification Rule (msdyn_recordidentificationrule) • Record Identification Validation Rule (msdyn_recordidentificationvalidationrule) • Restrict download of recording (msdyn_restrictdownloadrecording) • Restrict download of transcript (msdyn_restrictdownloadtranscript) • Screen pop timeout (msdyn_screenpoptimeout) • Screen pop timeout (msdyn_screenpoptimeout_optionSet) • Secure API Key (msdyn_secureapikey)	Sample 1: All live chat workstreams Sample 2: Single live chat workstream Sample 3: Multiple live chat workstreams

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
		• Skill Attachment Rules Count (msdyn_skillattachmentrulescount) • Skill Attachment Rules Count (Last Updated On) • (msdyn_skillattachmentrulescount_date) • Skill Attachment Rules Count (State) • (msdyn_skillattachmentrulescount_state) • Session scenario placeholder (msdyn_sessionscenarioplaceholder) • SupervisorAssign (msdyn_notificationtemplate_supervisorassign) • Transfer (msdyn_notificationtemplate_transfer) • Waiting Time Threshold (msdyn_waitingtimethreshold) • Work Distribution Mode (msdyn_workdistributionmode) • Work Stream (msdyn_liveworkstreamid)	
2.	Context Variable (msdyn_ocliveworkstreamcontextvariable)	• Name (msdyn_name) • Relation Ship Name (msdyn_relationshipname) • Type (msdyn_datatype) • Work stream (msdyn_liveworkstreamid) • IsList (msdyn_islist) • Modifiable (msdyn_ismodifiable) • Display Name (msdyn_displayname) • Displayable (msdyn_isdisplayable) • Entity Logical Name (msdyn_entitylogicalname) • Context variable (msdyn_ocliveworkstreamcontextvariableid) • Status (statecode) • Status Reason (statuscode) • System Defined (msdyn_issystemdefined)	Sample 1: Context Variables for all workstreams Sample 2: Context variables for a single live chat workstream Sample 3: Context Variables for multiple live chat workstreams
3.	Decision contract (msdyn_decisioncontract)	• Contract definition (msdyn_contractdefinition) • Decision contract (msdyn_decisioncontractid) • Name (msdyn_name) • Unique name (msdyn_uniquename)	Sample 1: Decision contract for all live chat workstreams Sample 2: Decision contract for a single live chat workstream Sample 3: Decision contract for multiple live chat workstreams
4.	Decision rule set (msdyn_decisionruleset)	• AI builder model (msdyn_aibmodelid) • Authoring mode (msdyn_authoringmode) • Decision rule set (msdyn_decisionrulesetid) • Description (msdyn_description) • Input contract (msdyn_inputcontractid) • Is input collection (msdyn_isinputcollection) • ML model type (msdyn_mlmodeltype)	Sample 1: Decision ruleset for all live chat workstreams Sample 2:

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
		• Name (msdyn_name) • Output contract (msdyn_outputcontractid) • Rule set definition (msdyn_rulesetdefinition) • Rule set type (msdyn_rulesettype) • Unique name (msdyn_uniquename)	Decision ruleset for a single live chat workstream Sample 3: Decision ruleset for multiple live chat workstreams
5.	Routing configuration (msdyn_routingconfiguration)	• Is active configuration (msdyn_isactiveconfiguration) • Name (msdyn_name) • Routing configuration (msdyn_routingconfigurationid) • Unique name (msdyn_uniquename) • Workstream (msdyn_liveworkstreamid)	Sample 1: Routing configuration for all live chat workstreams Sample 2: Routing configuration for a single live chat workstream Sample 3: Routing configuration for multiple live chat workstreams
6.	Routing configuration step (msdyn_routingconfigurationstep)	• Name (msdyn_name) • Routing configuration (msdyn_routingconfigurationid) • Routing configuration step (msdyn_routingconfigurationstepid) • Rule set (msdyn_rulesetid) • Step order (msdyn_steporder) • Step type (msdyn_type) • Unique name (msdyn_uniquename)	Sample 1: Routing configuration step for all live chat workstreams Sample 2: Routing configuration step for a single live chat workstream Sample 3: Routing configuration step for multiple live chat workstreams
7.	Workstream capacity profile (msdyn_liveworkstreamcapacityprofile)	• Capacity Profile (msdyn_capacityprofile_id) • Name (msdyn_name) • Workstream (msdyn_workstream_id) • Workstream Capacity profile (msdyn_liveworkstreamcapacityprofileid)	Sample 1: Workstream capacity profile for all live chat

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
			workstreams Sample 2: Workstream capacity profile for a single live chat workstream Sample 3: Workstream capacity profile for multiple live chat workstreams
8.	Quick Reply (msdyn_cannedmessage)	• Locale (msdyn_locale_field) • Message (msdyn_message) • Organization Id (organizationid) • Quick reply (msdyn_cannedmessageid) • Status (statecode) • Status Reason (statuscode) • TagsControlField (msdyn_tagscontrolfield) • Title (msdyn_title)	
9.	Tag (msdyn_octag)	• Name (msdyn_name) • Tag (msdyn_octagid)	

3. Generate the schema and save it.
4. Export the data and generate the compressed (zip) file.
5. Use the Configuration Migration tool, select the option to import data, and select the compressed file.

> **Important**
>
> When you fetch decision rulesets (msdyn_decisionrulesets) containing context variables, some decision rulesets are created without the dependency mappings. To work around this, perform the following steps:
>
> 1. Import data for all entities including the decision ruleset entity (msdyn_decisionrulesets).
> 2. Import data for the decision ruleset entity again. This step ensures that all dependency mappings for the decision rulesets are imported.

For sample schema to get all the required records, see Sample schema for live chat workstream.

FetchXML for workstream entity

Sample 1: All live chat workstreams

XML

```
<fetch distinct="true">
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_mode" operator="eq" value="717210001" />
            <condition attribute="msdyn_streamsource" operator="eq" value=" 192360000" />
        </filter>
```

```
    </entity>
</fetch>
```

Sample 2: Single live chat workstream

XML

```
<fetch>
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Live
Chat Workstream 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}" />
        </filter>
    </entity>
</fetch>
```

Sample 3: Multiple live chat workstreams

XML

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_liveworkstreamid" operator="in">
                <value uiname="Test Live Chat Workstream 1" uitype="msdyn_liveworkstream">{759255C7-7AC8-
98E0-7E3E-59A7F0312ABC}</value>
                <value uiname="Test Live Chat Workstream 2" uitype="msdyn_liveworkstream">{E6246229-33AC-
5A9E-2FFE-51668AD44098}</value>
            </condition>
        </filter>
    </entity>
</fetch>
```

FetchXML for context variables entity

Sample 1: All live chat workstreams context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" >
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="aa" >
            <filter type="and" >
                <condition attribute="msdyn_streamsource" operator="eq" value="192360000" />
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Single live chat workstream context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" >
        <filter type="and" >
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Live Chat Workstream"
uitype="msdyn_liveworkstream" value="{D3A1F09D-51A0-A6B7-266D-58E1BDB97B53}" />
        </filter>
    </entity>
</fetch>
```

Sample 3: Multiple live chat workstreams context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" >
        <filter type="or" >
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Live Chat Workstream"
uitype="msdyn_liveworkstream" value="{D3A1F09D-51A0-A6B7-266D-58E1BDB97B53}" />
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Live Chat Workstream 1"
uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
        </filter>
    </entity>
</fetch>
```

FetchXML for decision contract entity

Sample 1: Decision contract for all live chat workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="and" >
            <condition attribute="ismanaged" operator="eq" value="false" />
        </filter>
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="an" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="an" operator="eq" value="192360000"
/>
            </filter>
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="bd" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="bd" operator="eq" value="192360000"
/>
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Decision contract for a single live chat workstream

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="and" >
            <condition attribute="ismanaged" operator="eq" value="false" />
        </filter>
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq" uiname="Live
Chat Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
```

```
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq" uiname="Live
Chat Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Decision contract for multiple live chat workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="and" >
            <condition attribute="ismanaged" operator="eq" value="false" />
        </filter>
        <filter type="or" >
            <filter type="or" >
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq" uiname="ALM
Live Chat Test Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq" uiname="ALM
Live Chat Test Workstream" uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
            </filter>
            <filter type="or" >
                <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq" uiname=" Live
Chat Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
                <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq" uiname="Live
Chat Workstream 2" uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for decision ruleset entity

Sample 1: Decision ruleset for all live chat workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
```

```
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="af" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="af" operator="eq" value="192360000"
/>
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Decision ruleset for a single live chat workstream

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="Live
Chat Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Decision ruleset for multiple live chat workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
        <filter type="or" >
            <filter type="or" >
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="Live
Chat Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="Live
Chat Workstream 1" uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for routing configuration entity

Sample 1: Routing configuration for all live chat workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" operator="eq" value="192360000" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Routing configuration for a single live chat workstream

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Live
Chat Workstream 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Routing configuration for multiple live chat workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="in">
                    <value uiname="Test Live Chat Workstream 1" uitype="msdyn_liveworkstream">{759255C7-
7AC8-98E0-7E3E-59A7F0312ABC}</value>
                    <value uiname="Test Live Chat Workstream 2" uitype="msdyn_liveworkstream">{E6246229-
33AC-5A9E-2FFE-51668AD44098}</value>
                </condition>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for routing configuration step entity

Sample 1: Routing configuration step for all live chat workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
                <filter type="and">
                    <condition attribute="msdyn_mode" operator="eq" value="717210001" />
```

```
                    <condition attribute="msdyn_streamsource" operator="eq" value="192360000" />
                </filter>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Routing configuration step for a single live chat workstream

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
                <filter type="and">
                    <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Live Chat
Workstream 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}" />
                </filter>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Routing configuration step for multiple live chat workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
                <filter type="and">
                    <condition attribute="msdyn_liveworkstreamid" operator="in">
                        <value uiname="Test Live Chat Workstream 1" uitype="msdyn_liveworkstream">
{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}</value>
                        <value uiname="Test Live Chat Workstream 2" uitype="msdyn_liveworkstream">
{E6246229-33AC-5A9E-2FFE-51668AD44098}</value>
                    </condition>
                </filter>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for workstream capacity profile entity

Sample 1: Workstream capacity profile for all live chat workstreams

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id"
link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" operator="eq" value="192360000" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Workstream capacity profile for a single live chat workstream

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id"
link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Live
Chat Workstream 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Workstream capacity profile for multiple live chat workstreams

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id"
link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="in">
                    <value uiname="Test Live Chat Workstream 1" uitype="msdyn_liveworkstream">{759255C7-
7AC8-98E0-7E3E-59A7F0312EFC}</value>
                    <value uiname="Test Live Chat Workstream 2" uitype="msdyn_liveworkstream">{E6246229-
33AC-5A9E-2FFE-51668AD44215}</value>
                </condition>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Migrate configuration for live chat widgets

The following assumptions are in place:

- Rules will be exported after chat configurations to be able to use pre-conversation survey questions as conversation context variables.
- You can't create the context variables when you're adding new questions to the pre-conversation survey section.
- Queues can be exported after live chat configurations and rules definition, to be able to use pre-conversation survey questions as context variables.
- The workstream must exist whether it was created manually or previously migrated to the destination organization.

To migrate data for live chat widgets

1. Use the Configuration Migration tool to create the schema and export data from the source organization for the live chat widget and related entities.
    - **Entity display name**: When you create the schema, select the entities in the sequence as mentioned in the table.
    - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't have to select the system-defined attributes, such as Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes if necessary.

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)
1.	Chat widget (msdyn_livechatconfig)	FetchXML to filter records for live chat **Note:** - Replace the value for msdyn_liveworkstream in the condition section. - Don't include msdyn_widgetappid and msdyn_widgetsnippet as part of the entity. - Ensure as part of the entity declaration in the schema that the plugin is disabled. (disableplugins="false") • (Deprecated) During non-operating hour (msdyn_duringnonoperatinghours) • Agent display name(msdyn_agentdisplayname) • Allow download of transcript (msdyn_enablechattranscriptdownload) • Allow email of transcript (msdyn_enablechattranscriptemail) • Anonymize Agent (msdyn_showagentname) • Authentication settings (msdyn_authsettingsid) • Auto Detect Language (msdyn_autodetectlanguage) • Bot Survey (msdyn_postconversationsurveybotsurvey) • Calling options (msdyn_callingoptions) • Chat Widget (msdyn_livechatconfigid) • Co-browse provider (msdyn_cobrowseprovider) • Display Generic Name (msdyn_genericagentdisplayname) • Email Template (msdyn_emailtemplate) • Enable (msdyn_postconversationsurveyenable) • Enable Co-browse (msdyn_enablecobrowse) • Enable file attachments for agents (msdyn_enablefileattachmentsforagents) • Enable file attachments for customers (msdyn_enablefileattachmentsforcustomers) • Enable Screen sharing (msdyn_enablescreensharing) • Indicates the conversation mode of the chat widget (msdyn_conversationmode) • Indicates whether display of wait time is enabled (msdyn_averagewaittime_enabled) • infolabel(msdyn_infolabel) • Language(msdyn_widgetlocale) • Language(msdyn_ocwidgetlanguage) • Language (msdyn_language) • Logo (msdyn_avatarurl) • Message (msdyn_postconversationsurveymessagetext) • Modified On (modifiedon) • Name (msdyn_name) • Offline Widget Title (msdyn_offlinewidgettitle) • Offline Widget Subtitle (msdyn_offlinewidgetsubtitle) • Offline Widget Theme Color (msdyn_offlinewidgetthemecolor) • Operating hours (msdyn_operatinghourid) • Portal URL (msdyn_portalurl) • Position (msdyn_widgetposition) • Post-chat Survey (msdyn_postchatenabled) • Pre-Chat Survey (msdyn_prechatenabled) • Proactive-chat (msdyn_proactivechatenabled) • Provider API key (msdyn_oc_geolocationprovider) • Question Set for Authenticated Users (msdyn_prechatquestionnaireauthenticated) • Question Set for Unauthenticated Users (msdyn_prechatquestionnaireunauthenticated) • Reconnect to previous agent (msdyn_timetoreconnectwithpreviousagent) • Redirection URL (msdyn_redirectionurl) • Request visitor location (msdyn_requestvisitorlocation) • Screen sharing provider (msdyn_screensharingprovider) • Sender Mailbox (msdyn_mailbox) • Show position in queue (msdyn_positioninqueue_enabled)

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)
		• Show widget during offline hours (msdyn_showwidgetduringofflinehours) • Status (statecode) • Status Reason (statuscode) • Subtitle (msdyn_widgetsubtitle) • Survey (msdyn_postconversationsurvey) • Survey Mode (msdyn_postconversationsurveymode) • Theme Color (msdyn_widgetthemecolor) • Title (msdyn_widgettitle) • Turn on reconnect to previous chat (msdyn_enablechatreconnect) • Turn on sound notifications (msdyn_widgetsoundnotification) • Turn on unread messages indicator (msdyn_widgetvisualnotification) • Work stream (msdyn_liveworkstreamid)
2.	Chat Authentication Settings (msdyn_authenticationsettings)	• Authentication type (msdyn_authenticationtype) • Chat Authentication Settings (msdyn_authenticationsettingsid) • JavaScript client function (msdyn_javascriptclientfunction) • Name (msdyn_name) • Public key URL (msdyn_publickeyurl) • Status (statecode) • Status Reason (statuscode)
3.	Localization (msdyn_oclocalizationdata)	• Automated message (msdyn_systemmessageid) • Default Localized Text (msdyn_defaultlocalizedtext) • Entity Column Name (msdyn_entitycolumnname) • Entity Name (msdyn_entityname) • Entity Record ID (msdyn_entityrecordid) • Is default (msdyn_isdefault) • Language code (msdyn_customerlanguageid) • Language Code (msdyn_languagecode) • Localization (msdyn_oclocalizationdataid) • Localized text (msdyn_localizedtext) • Organization ID (organizationid) • Status (statecode) • Status Reason (statuscode)
4.	Message (msdyn_ocsystemmessage)	• Channel (msdyn_streamsource) • Default language (msdyn_defaultlanguage) • Instance ID (msdyn_instanceid) • Message (msdyn_ocsystemmessageid) • Message description (msdyn_messagedescription) • Message recipient (msdyn_messagereceiver) • Message template trigger (msdyn_messagetemplatetrigger) • Message Text (msdyn_messagetext) • Message trigger (msdyn_systemmessageeventtype) • Message type (msdyn_messagetype) • Name (msdyn_name) • Organization ID (organizationid) • Status (statecode) • Status Reason (sttuscode) • Widget (msdyn_widgetid)
5.	Survey Answer Option (msdyn_chatansweroption)	• Name (msdyn_name) • Status (statecode) • Status Reason (statuscode) • Survey Answer Option (msdyn_chatansweroptionid) • Survey question (msdyn_answeroptionsid)
6.	Survey Question (msdyn_surveyquestion)	• Answer type (msdyn_answertyp)

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)
		• Help Text (msdyn_placeholdertext) • Question name (msdyn_nam) • Question text (msdyn_questiontext) • Rating Scale (msdyn_ratingscal) • Status (statecod) • Status Reason (statuscod) • Survey Question (msdyn_surveyquestionid) • Work stream (msdyn_liveworkstreamtochatquestion) •
7.	Survey Question Sequence (msdyn_questionsequence)	• - Chat widget (msdyn_chatengagementtochatsequenceid) • Name (msdyn_name) • Order (sequencenumber) • Required (msdyn_questionrequired) • Status (statecode) • Status Reason (statuscode) • Survey question name (msdyn_surveyquestion) • Survey Question Sequence (msdyn_questionsequenceid) • Survey type (msdyn_chatquestionnairetype)
8.	Survey Response(msdyn_chatquestionnaireresponse)	• Name (msdyn_name) • Status (statecode) • Status Reason (statuscode) • Survey answer option (msdyn_chatansweroptionid) • Survey answer text (msdyn_chatanswertext) • Survey Question ID (msdyn_surveyquestionid) • Survey response (msdyn_chatquestionnaireresponseid) • Survey Response Values (msdyn_chatquestionnaireresponseitemid)
9.	Chat Widget Location (msdyn_livechatwidgetlocation)	• Chat widget (msdyn_livechatconfigid) • Chat Widget Location (msdyn_livechatwidgetlocationid) • Location URL Wildcard (msdyn_locationurlwildcard) • Modified By (modifiedby) • Rule Type (msdyn_ruletype) • Status (statecode) • Status Reason (statuscode) • Title (msdyn_name • Value (msdyn_domainvalue)
10.	Chat Widget Language (msdyn_chatwidgetlanguage)	• Chat Widget Language (msdyn_chatwidgetlanguageid) • Language Name (msdyn_languagename) • Locale ID (msdyn_localeid) • Status (statecode) • Status Reason (statuscode)
11.	Localized Survey Question (msdyn_localizedsurveyquestion)	• Description (msdyn_description) • Language Code (msdyn_languagecode) • Localized Question Text (msdyn_localizedquestiontext) • Localized Survey Question (msdyn_localizedsurveyquestionid) • Name (msdyn_name) • Status (statecode) • Status Reason (statuscode) • Survey Question (msdyn_surveyquestionid)
12.	Geolocation Provider(msdyn_oc_geolocationprovider)	• Bing Maps API key (msdyn_providerapikey) • Geo Location Provider (msdyn_oc_geolocationproviderid) • Name (msdyn_name) • Provider API Key Version (msdyn_providerapikeyversion) • Provider name (msdyn_providername)

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)
		• Status (statecode) • Status Reason (statuscode)

2. Generate the schema and save it.
3. Export the data and generate the compressed (zip) file.
4. Use the Configuration Migration tool, select the option to import data, and then select the compressed file.

For sample schema to get all the required records, see Sample schema for live chat channel

FetchXML for live chat

XML

```
    <fetch version="1.0" mapping="logical" distinct="false">
    <entity name="msdyn_livechatconfig">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ab">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="elopez-ws-lcw-m7"
uitype="msdyn_liveworkstream" value="{EBEE52BD-2EFD-99C5-C658-F13E7C7D3F8C}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Verify your migration

After you import the unified routing-related configuration data successfully from the source to target organization, perform the following steps in the target organization:

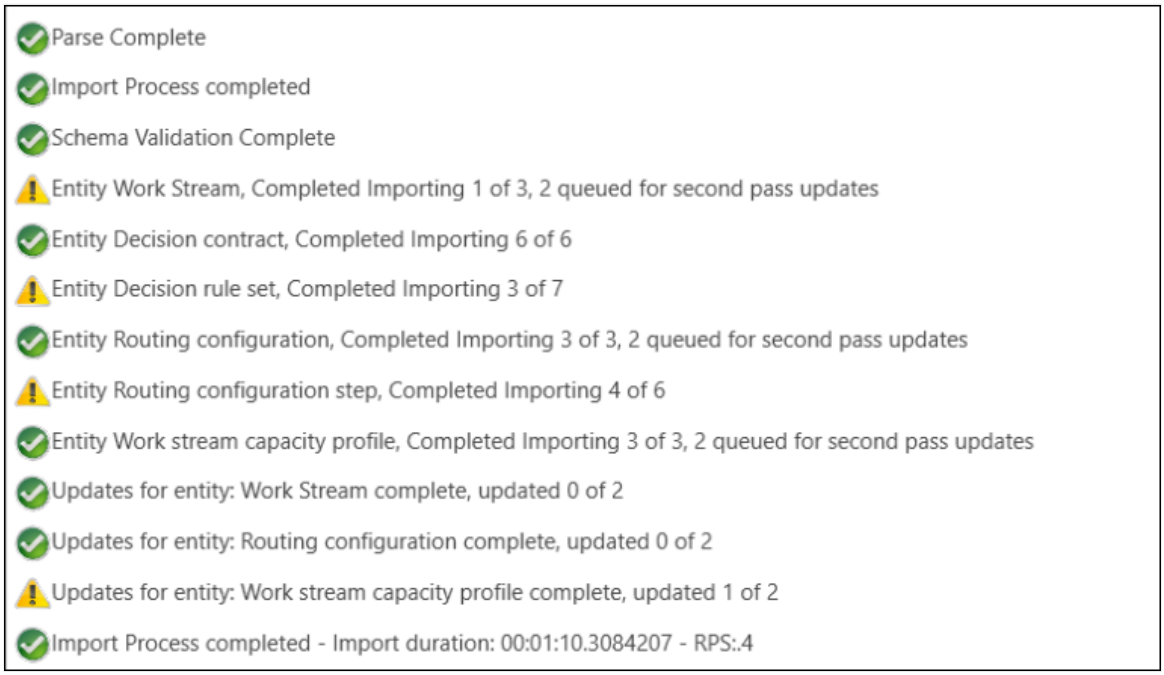
1. In the UI, make sure that the unified routing configuration and rulesets are rendered properly and don't display errors.
2. If skills and rating values are used in unified routing rulesets, then you need to manually link, associate, or create the users, bookable resources, and bookable resources characteristics records.
3. If capacity profiles are used in rulesets and workstreams for unified routing, then you need to manually link, associate, or create the users, bookable resources, and bookable resources capacity profile records.

Considerations for export and import of data

To troubleshoot any issues that you might face during migration, check the log files as follows:

- When you import data into the target organization, if you see yellow warning symbols, then check the following logs in the Configuration Migration tool:
  - **Login_ErrorLog.log**: Provides information about any issues you had when you signed in to the organization using the Configuration Management tool.
  - **DataMigrationUtility.log**: Provides information about the tasks performed using the tool during the last migration.
  - **ImportDataDetail.log**: Provides information about the data imported by the tool in the last data import.

  More information: Troubleshoot configuration data migration issues using log files



- If the logs contain network errors, then repeat the import process.

  Here's an example:

```
Time: 11:46:09 PM
Error: There was no endpoint listening at
`https://www.contoso.com/XRMServices/2011/Organization.svc/web?SDKClientVersion=9.2.46.5279` that
could accept the message. This is often caused by an incorrect address or SOAP action. See
InnerException, if present, for more details.
Stack Trace: Service stack trace:
```

See also

Migrate configuration for records based on unified routing

Migrate data for the voice channel

Article • 09/18/2023

Use the Configuration Migration tool to migrate the configurations from the source organization to the target organization for the voice channel. For information on how to use the Configuration Migration tool, see the following articles:

- Download Configuration Migration tool
- How the Configuration Migration tool works

Prerequisites

The following prerequisites must be met:

- In the source organization, if a unified routing ruleset refers to the following, then ensure that they exist in the target organization before you proceed with the migration:
  - Custom entities
  - Attributes
  - Relationships
  - Option sets
  - Lookup values
- Ensure that the user who performs the migration has the required privileges on the following unified routing entities in the source and target organizations:
  - Workstream (`msdyn_liveworkstream`)
  - Channel configuration (`msdyn_omnichannelconfiguration`)
  - Notification template (`msdyn_notificationtemplate`)
  - Session template (`msdyn_sessiontemplate`)
  - Operating hours (`msdyn_operatinghour`)
  - Characteristic (`characteristic`)
  - Rating Model (`rating model`)
  - Rating Value (`ratingvalue`)
  - Capacity Profile (`msdyn_capacityprofile`)
  - Queue (`queue`)
  - Decision contract (`msdyn_decisioncontract`)
  - Decision ruleset (`msdyn_decisionruleset`)
  - Assignment configuration (`msdyn_assignmentconfiguration`)
  - Assignment configuration Step (`msdyn_assignmentconfigurationstep`)
  - Routing configuration (`msdyn_routingconfiguration`)
  - Routing configuration step (`msdyn_routingconfigurationstep`)
  - Workstream capacity profile (`msdyn_liveworkstreamcapacityprofile`)
  - Context variable (`msdyn_ocliveworkstreamcontextvariable`)

> **Important**
>
> The migration of the account, channel, Azure Communication Services phone number acquisition, phone number configuration, bot configuration, and AI and analytics settings is not in scope.

Migrate the voice channel configuration

You must perform the steps in the order they're listed to migrate your configuration data successfully. Use the information in the tables and refer to the corresponding sample schemas for each configuration.

1. Migrate configuration using a solution
2. Export and import configuration for skill-based routing
3. Export and import configuration for capacity profiles
4. Export and import configuration for voice channel queues
5. Export and import configuration for voice channel workstreams
6. Migrate configuration for voice channels
7. Verify your migration
8. Troubleshoot export and import of data

Migrate configuration using a solution

If you use custom session templates and notifications in your voice routing setup, perform the steps outlined in Migrate configuration using a solution

Migrate skill-based configuration

If skill-based routing rulesets are used in your unified routing setup, perform the steps outlined in Migrate data for skill-based routing. Make sure to adjust any filtering fetch xml appropriately for voice.

Migrate configuration capacity profiles

If you have configured capacity profiles in your voice routing setup, perform the steps outlined in Export and import data for capacity profiles.

Migrate configuration for voice channel queues

For exporting and importing queues for the voice channel, perform the steps outlined in Migrate data for unified routing-based record queues.

Migrate configuration for voice channel workstreams

1. Use the Configuration Migration tool to create the schema and export data from the source organization for voice workstreams.

    - **Entity display name**: When you create the schema, select the entities in the same sequence as mentioned in the table.
    - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't need to select the out-of-the-box system defined attributes like Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes, if necessary.
    - **Use FetchXML to filter records**: For each entity, use the appropriate FetchXML query that's mentioned in the following table to get single, multiple, or all records based on your requirement. For single or multiple records, you need to use source organization to get the correct name in uiname and GUID in value. If required, you can use the **ADVANCED FIND** menu item to construct the appropriate FetchXML query.
    - **Configure import settings**: For the Decision contract entity, ensure that you select the **Do not update existing records** checkbox.

2. Ensure that the workstreams that are referred in the configuration of the voice channels are included in the migration.

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
1.	Workstream (msdyn_liveworkstream)	• API Key (msdyn_apikey) • API Key Version Number (msdyn_apikeyversionnumber) • Allow Automated Messages (msdyn_enableautomatedmessages) Allowed Presences (msdyn_allowedpresences) • Assign WorkItem After Decline or Timeout (msdyn_assignworkitemafterdecline) • Auto-close after inactivity (msdyn_autocloseafterinactivity) • Block capacity for wrap up state (msdyn_blockcapacityforwrapup) • Bot queue (msdyn_bot_queue) • Bot rule (msdyn_bot_rule) • Bot user (msdyn_bot_user) • CallbackPreviewDialing (msdyn_notificationtemplate_callback_previewdialing) • Connectors (msdyn_connectorsurl) • Consult (msdyn_notificationtemplate_consult) • Conversation mode of chat channels (msdyn_conversationmode) • Customer ID (msdyn_customerid) • Customer Disconnect Hold Duration For Open Conversation (msdyn_customerdisconnectholddurationforopenconversation) • Capacity (msdyn_capacityrequired) • Capacity format (msdyn_capacityformat) • Channel (msdyn_streamsource) • Contract Id (msdyn_routingcontractid) • Default (msdyn_sessiontemplate_default) • Default Queue (msdyn_defaultqueue) • Direction (msdyn_direction) • Enable selecting from push-based work streams (msdyn_enableselectingfrompushbasedworkstreams) • Entity (msdyn_masterentityroutingconfigurationid) • FallBack Language (msdyn_fallbacklanguage) • Follow-up after waiting (msdyn_followupafterwaiting) • Handling Time Threshold (msdyn_handlingtimethreshold) • Incoming authenticated (msdyn_notificationtemplate_incoming_auth) • Incoming unauthenticated (msdyn_notificationtemplate_incoming_unauth) • Is Default (msdyn_isdefault) • Keep same agent for entire conversation (msdyn_enableagentaffinity) • Last Validation On (msdyn_lastvalidationon) • Last Validation Status (msdyn_lastvalidationstatus) • Matching Logic (msdyn_matchinglogic) • Max Concurrency (msdyn_maxconcurrentconnection) • Mode (msdyn_mode) • Name (msdyn_name) • Notification (msdyn_notification) • Notification scenario placeholder (msdyn_notificationscenarioplaceholder) • Outbound queue (msdyn_outboundqueueid) • Record Identification Rule (msdyn_recordidentificationrule) • Record Identification Validation Rule (msdyn_recordidentificationvalidationrule) • Restrict download of recording (msdyn_restrictdownloadrecording) • Restrict download of transcript (msdyn_restrictdownloadtranscript) • Screen pop timeout (msdyn_screenpoptimeout) • Screen pop timeout (msdyn_screenpoptimeout_optionSet) • Secure API Key (msdyn_secureapikey)	Sample 1: All voice workstreams Sample 2: Single voice workstream Sample 3: Multiple voice workstreams

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
		• Skill Attachment Rules Count (msdyn_skillattachmentrulescount) • Skill Attachment Rules Count (Last Updated On) (msdyn_skillattachmentrulescount_date) • Skill Attachment Rules Count (State) (msdyn_skillattachmentrulescount_state) • Session scenario placeholder (msdyn_sessionscenarioplaceholder) • SupervisorAssign (msdyn_notificationtemplate_supervisorassign) • Transfer (msdyn_notificationtemplate_transfer) • Waiting Time Threshold (msdyn_waitingtimethreshold) • Work Distribution Mode (msdyn_workdistributionmode) • Work Stream (msdyn_liveworkstreamid)	
2.	Context Variable (msdyn_ocliveworkstreamcontextvariable)	• Name (msdyn_name) • Relation Ship Name (msdyn_relationshipname) • Type (msdyn_datatype) • Work stream (msdyn_liveworkstreamid) • IsList (msdyn_islist) • Modifiable (msdyn_ismodifiable) • Display Name (msdyn_displayname) • Displayable (msdyn_isdisplayable) • Entity Logical Name (msdyn_entitylogicalname) • Context variable (msdyn_ocliveworkstreamcontextvariableid) • Status (statecode) • Status Reason (statuscode) • System Defined (msdyn_issystemdefined)	Sample 1: Context Variables for all voice workstreams Sample 2: Context variables for a single voice workstream Sample 3: Context Variables for multiple voice workstreams
3.	Decision contract (msdyn_decisioncontract)	• Contract definition (msdyn_contractdefinition) • Decision contract (msdyn_decisioncontractid) • Name (msdyn_name) • Unique name (msdyn_uniquename)	Sample 1: Decision contract for all voice workstreams Sample 2: Decision contract for a single voice workstream Sample 3: Decision contract for multiple voice workstreams
4.	Decision rule set (msdyn_decisionruleset)	• AI builder model (msdyn_aibmodelid) • Authoring mode (msdyn_authoringmode) • Decision rule set (msdyn_decisionrulesetid) • Description (msdyn_description) • Input contract (msdyn_inputcontractid) • Is input collection (msdyn_isinputcollection) • ML model type (msdyn_mlmodeltype) • Name (msdyn_name) • Output contract (msdyn_outputcontractid)	Sample 1: Decision ruleset for all voice workstreams Sample 2: Decision ruleset for a

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
		• Rule set definition (msdyn_rulesetdefinition) • Rule set type (msdyn_rulesettype) • Unique name (msdyn_uniquename)	single voice workstream Sample 3: Decision ruleset for multiple voice workstreams
5.	Routing configuration (msdyn_routingconfiguration)	• Is active configuration (msdyn_isactiveconfiguration) • Name (msdyn_name) • Routing configuration (msdyn_routingconfigurationid) • Unique name (msdyn_uniquename) • Workstream (msdyn_liveworkstreamid)	Sample 1: Routing configuration for all voice workstreams Sample 2: Routing configuration for a single voice workstream Sample 3: Routing configuration for multiple voice workstreams
6.	Routing configuration step (msdyn_routingconfigurationstep)	• Name (msdyn_name) • Routing configuration (msdyn_routingconfigurationid) • Routing configuration step (msdyn_routingconfigurationstepid) • Rule set (msdyn_rulesetid) • Step order (msdyn_steporder) • Step type (msdyn_type) • Unique name (msdyn_uniquename)	Sample 1: Routing configuration step for all voice workstreams Sample 2: Routing configuration step for a single voice workstream Sample 3: Routing configuration step for multiple voice workstreams
7.	Workstream capacity profile (msdyn_liveworkstreamcapacityprofile)	• Capacity Profile (msdyn_capacityprofile_id) • Name (msdyn_name) • Workstream (msdyn_workstream_id) • Workstream Capacity profile (msdyn_liveworkstreamcapacityprofileid)	Sample 1: Workstream capacity profile for all voice workstreams Sample 2: Workstream capacity

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
			profile for a single voice workstream Sample 3: Workstream capacity profile for multiple voice workstreams

3. Generate the schema and save it.
4. Export the data and generate the compressed (zip) file.
5. Use the Configuration Migration tool, and select the option to import data, and select the compressed file.

> **Important**
>
> When you fetch decision rulesets (msdyn_decisionrulesets) containing context variables, some decision rulesets are created without the dependency mappings. To work around this, perform the following steps:
>
> 1. Import data for all entities including the decision ruleset entity (msdyn_decisionrulesets).
> 2. Import data for the decision ruleset entity again. This step ensures that all dependency mappings for the decision rulesets are imported.

For sample schema to get all the required records, see Sample schema for voice workstream.

FetchXML for workstream entity

Sample 1: All voice workstreams

XML

```
<fetch distinct="true">
  <entity name="msdyn_liveworkstream">
    <filter type="and">
      <condition attribute="msdyn_mode" operator="eq" value="717210001" />
      <condition attribute="msdyn_streamsource" operator="eq" value="192440000" />
    </filter>
  </entity>
</fetch>
```

Sample 2: Single voice workstream

XML

```
<fetch>
  <entity name="msdyn_liveworkstream">
    <filter type="and">
      <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Voice Workstream 1"
uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}" />
    </filter>
  </entity>
</fetch>
```

Sample 3: Multiple voice workstreams

XML

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
  <entity name="msdyn_liveworkstream">
    <filter type="and">
      <condition attribute="msdyn_liveworkstreamid" operator="in">
        <value uiname="Test Voice Workstream 1" uitype="msdyn_liveworkstream">{759255C7-7AC8-98E0-7E3E-
59A7F0312ABC}</value>
        <value uiname="Test Voice Workstream 2" uitype="msdyn_liveworkstream">{E6246229-33AC-5A9E-2FFE-
51668AD44098}</value>
      </condition>
    </filter>
  </entity>
</fetch>
```

FetchXML for context variables entity

Sample 1: All voice workstreams context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" >
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="aa" >
            <filter type="and" >
                <condition attribute="msdyn_streamsource" operator="eq" value="192440000" />
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Single voice workstream context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" >
        <filter type="and" >
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Voice Workstream"
uitype="msdyn_liveworkstream" value="{D3A1F09D-51A0-A6B7-266D-58E1BDB97B53}" />
        </filter>
    </entity>
</fetch>
```

Sample 3: Multiple voice workstreams context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" ><a name="BKMK3vwcv"></a>
        <filter type="or" >
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Voice Workstream"
uitype="msdyn_liveworkstream" value="{D3A1F09D-51A0-A6B7-266D-58E1BDB97B53}" />
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Voice Workstream 1"
uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
        </filter>
    </entity>
</fetch>
```

FetchXML for decision contract entity

Sample 1: Decision contract for all voice workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="an" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="an" operator="eq" value="192440000"
/>
            </filter>
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="bd" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="bd" operator="eq" value="192440000"
/>
            </filter>
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="bk" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="bk" operator="eq" value="192440000"
/>
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bh" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bi" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bj" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bk" />
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Decision contract for a single voice workstream

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq" uiname="Voice
Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq" uiname="Voice
Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="bk" operator="eq" uiname="Voice
Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
```

```
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bh" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bi" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bj" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bk" />
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Decision contract for multiple voice workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="or" >
            <filter type="and" >
                <filter type="or" >
                       <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq"
uiname="Voice Workstream 1" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}"
/>
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq" uiname="Voice
Workstream 2" uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
         </filter>
            </filter>
            <filter type="and" >
                <filter type="or" >
                       <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq"
uiname="Voice Workstream 1" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}"
/>
                <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq" uiname="Voice
Workstream 2" uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
         </filter>
            </filter>
            <filter type="and" >
                <filter type="or" >
                       <condition attribute="msdyn_liveworkstreamid" entityname="bk" operator="eq"
uiname="Voice Workstream 1" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}"
/>
                <condition attribute="msdyn_liveworkstreamid" entityname="bk" operator="eq" uiname="Voice
Workstream 2" uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
         </filter>
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
```

```
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bh" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bi" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bj" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bk" />
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for decision ruleset entity

Sample 1: Decision ruleset for all voice workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="af" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="af" operator="eq" value="192440000"
/>
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Decision ruleset for a single voice workstream

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="Voice
Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Decision ruleset for multiple voice workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
        <filter type="or" >
            <filter type="or" >
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="Voice
Workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="Voice
Workstream 1" uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for routing configuration entity

Sample 1: Routing configuration for all voice workstreams

XML

```
<fetch>
  <entity name="msdyn_routingconfiguration">
    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
      <filter type="and">
        <condition attribute="msdyn_mode" operator="eq" value="717210001" />
        <condition attribute="msdyn_streamsource" operator="eq" value="192440000" />
      </filter>
    </link-entity>
  </entity>
</fetch>
```

Sample 2: Routing configuration for a single voice workstream

XML

```
<fetch>
  <entity name="msdyn_routingconfiguration">
    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
      <filter type="and">
        <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Voice Workstream 1"
uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}" />
      </filter>
    </link-entity>
  </entity>
</fetch>
```

Sample 3: Routing configuration for multiple voice workstreams

XML

```
<fetch>
  <entity name="msdyn_routingconfiguration">
    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
      <filter type="and">
        <condition attribute="msdyn_liveworkstreamid" operator="in">
          <value uiname="Test Voice Workstream 1" uitype="msdyn_liveworkstream">{759255C7-7AC8-98E0-7E3E-
```

```
59A7F0312ABC}</value>
          <value uiname="Test Voice Workstream 2" uitype="msdyn_liveworkstream">{E6246229-33AC-5A9E-2FFE-
51668AD44098}</value>
        </condition>
      </filter>
    </link-entity>
  </entity>
</fetch>
```

FetchXML for routing configuration step entity

Sample 1: Routing configuration step for all voice workstreams

XML

```
<fetch>
  <entity name="msdyn_routingconfigurationstep">
    <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
      <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="al">
        <filter type="and">
          <condition attribute="msdyn_mode" operator="eq" value="717210001" />
          <condition attribute="msdyn_streamsource" operator="eq" value="192440000" />
        </filter>
      </link-entity>
    </link-entity>
  </entity>
</fetch>
```

Sample 2: Routing configuration step for a single voice workstream

XML

```
<fetch>
  <entity name="msdyn_routingconfigurationstep">
    <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
      <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="al">
        <filter type="and">
          <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Voice Workstream 1"
uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}" />
        </filter>
      </link-entity>
    </link-entity>
  </entity>
</fetch>
```

Sample 3: Routing configuration step for multiple voice workstreams

XML

```
<fetch>
  <entity name="msdyn_routingconfigurationstep">
    <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
      <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="al">
        <filter type="and">
          <condition attribute="msdyn_liveworkstreamid" operator="in">
            <value uiname="Test Voice Workstream 1" uitype="msdyn_liveworkstream">{759255C7-7AC8-98E0-
7E3E-59A7F0312ABC}</value>
            <value uiname="Test Voice Workstream 2" uitype="msdyn_liveworkstream">{E6246229-33AC-5A9E-
2FFE-51668AD44098}</value>
          </condition>
        </filter>
```

```
      </link-entity>
    </link-entity>
  </entity>
</fetch>
```

FetchXML for workstream capacity profile entity

Sample 1: Workstream capacity profile for all voice workstreams

XML

```
<fetch>
  <entity name="msdyn_liveworkstreamcapacityprofile">
    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id" link-type="inner" alias="am">
      <filter type="and">
        <condition attribute="msdyn_mode" operator="eq" value="717210001" />
        <condition attribute="msdyn_streamsource" operator="eq" value="192440000" />
      </filter>
    </link-entity>
  </entity>
</fetch>
```

Sample 2: Workstream capacity profile for a single voice workstream

XML

```
<fetch>
  <entity name="msdyn_liveworkstreamcapacityprofile">
    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id" link-type="inner" alias="am">
      <filter type="and">
        <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Voice Workstream 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}" />
      </filter>
    </link-entity>
  </entity>
</fetch>
```

Sample 3: Workstream capacity profile for multiple voice workstreams

XML

```
<fetch>
  <entity name="msdyn_liveworkstreamcapacityprofile">
    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id" link-type="inner" alias="am">
      <filter type="and">
        <condition attribute="msdyn_liveworkstreamid" operator="in">
          <value uiname="Test Voice Workstream 1" uitype="msdyn_liveworkstream">{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}</value>
          <value uiname="Test Voice Workstream 2" uitype="msdyn_liveworkstream">{E6246229-33AC-5A9E-2FFE-51668AD44215}</value>
        </condition>
      </filter>
    </link-entity>
  </entity>
</fetch>
```

Migrate configuration for voice channel settings

Assume that the workstream must already exist; created manually or previously migrated in the destination organization.

To migrate data for voice channel

1. Use the Configuration Migration tool to create the schema and export data from the source organization for the voice channel and related entities.

   - **Entity display name**: When you create the schema, select the entities in the sequence that's mentioned in the table.
   - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't have to select the system-defined attributes, such as Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes if necessary.

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)
1.	Voice Channel Setting (msdyn_ocvoicechannelsetting)	FetchXML to filter records for voice channel settings **Note:** - Replace the value for msdyn_liveworkstream in the condition section. - Don't include Phone Number (msdyn_phonenumberid) column as records in Phone Number table are environment-specific and can't be migrated. You need to assign phone number manually in destination environment. If you aren't allowed to perform this action for any reason, you can include Phone Number column. But, before you import, you need to manually edit data.xml file inside the exported zip file and replace its value with the correct phone number GUID in the destination environment. - Ensure as part of the entity declaration in the schema that the plugin is enabled. (disableplugins="false") • Announce average wait time (msdyn_announceaveragewaittime) • Announce position in queue (msdyn_announcepositioninqueue) • Enable agent control of the recording (msdyn_agentrecordingcontrolsenabled) • Enable agent control of the transcription (msdyn_agenttranscriptioncontrolsenabled) • Enable agent control to add an external participant (msdyn_agentexternalparticipantcontrolenabled) • Enable agent control to add an external participant (msdyn_agentexternalparticipantcontrolenabled) • Enable agent control to add an external participant on Teams (msdyn_agentexternalteamsparticipantcontrolenabled) • Name (msdyn_name) • Operating hours (msdyn_operatinghoursid) • Recording Enabled (msdyn_recordingenabled) • Recording mode (msdyn_recordingmode) • Status (statecode) • Status Reason (statuscode) • Transcription Enabled (msdyn_transcriptionenabled) • Transcription mode (msdyn_transcriptionmode) • Voice Channel Setting (msdyn_voicechannelsettingid) • Work stream (msdyn_liveworkstreamid)
2.	Localization (msdyn_oclocalizationdata)	FetchXML to filter records for voice channel localizations • Automated message (msdyn_systemmessageid) • Default Localized Text (msdyn_defaultlocalizedtext) • Entity Column Name (msdyn_entitycolumnname) • Entity Name (msdyn_entityname) • Entity Record ID (msdyn_entityrecordid) • Is Default (msdyn_isdefault) • Language Code (msdyn_customerlanguageid) • Language Code (msdyn_languagecode) • Localization (msdyn_oclocalizationdataid) • Localized text (msdyn_localizedtext) • Organization ID (organizationid) • Status (statecode) • Status Reason (statuscode)
3.	Message (msdyn_ocsystemmessage)	• Channel (msdyn_streamsource)

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)
		• Default language (msdyn_defaultlanguage) • Instance ID (msdyn_instanceid) • Message (msdyn_ocsystemmessageid) • Message description (msdyn_messagedescription) • Message recipient (msdyn_messagereceiver) • Message template trigger (msdyn_messagetemplatetrigger) • Message Text (msdyn_messagetext) • Message trigger (msdyn_systemmessageeventtype) • Message type (msdyn_messagetype) • Name (msdyn_name) • Organization ID (organizationid) • Status (statecode) • Status Reason (statuscode)
4.	Voice (msdyn_ocvoice)	• Language (msdyn_languageid) • Name (msdyn_name) • pitch (msdyn_pitch) • speaking speed (msdyn_speakingspeed) • Status (statecode) • Status Reason (statuscode) • voice (msdyn_ocvoiceid) • voice name (msdyn_voicename) • voice style (msdyn_voicestyle)
5.	Voice Channel Language Setting (msdyn_ocvoicechannellanguagesetting)	**Note:** - Before migrating this table, make sure Survey bot systemuser (msdyn_surveybotsystemuserid) exists in User (systemuser) table, and all music files referenced by Hold music (msdyn_holdmusicid) and Wait music (msdyn_waitmusicid) columns in each record already exist in the Phone Music (msdyn_ocphonemusic) table of destination environment. Unfortunately, Phone Music table has file columns and can't be migrated. • Hold music (msdyn_holdmusicid) • Is Primary (msdyn_isprimary) • Language (msdyn_languageid) • Name (msdyn_name) • Status (statecode) • Status Reason (statuscode) • Survey bot systemuser (msdyn_surveybotsystemuserid) • Voice (msdyn_ocvoiceid) • Voice Channel Language Setting (msdyn_ocvoicechannellanguagesettingid) • Voice channel setting (msdyn_ocvoicechannelsettingid) • Wait music (msdyn_waitmusicid)
6.	Provisioning State (msdyn_ocprovisioningstate)	FetchXML to filter records for voice provisioning states • voicechannelsettingsid (msdyn_ocvoicechannelsettingsid) • Name (msdyn_name)

2. Generate the schema and save it.

3. Export the data and generate the compressed (zip) file.

4. Use the Configuration Migration tool, select the option to import data, and then select the compressed file.

For sample schema to get all the required records, see Sample schema for voice channel.

FetchXML for voice channel settings

```
XML
```

```
<fetch>
  <entity name="msdyn_ocvoicechannelsetting">
    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ab">
      <filter type="and">
        <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Voice Workstream 1"
uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}" />
      </filter>
    </link-entity>
  </entity>
</fetch>
```

FetchXML for voice channel localizations

XML

```
<fetch>
  <entity name="msdyn_oclocalizationdata">
    <link-entity name="msdyn_ocsystemmessage" from="msdyn_ocsystemmessageid" to="msdyn_systemmessageid"
link-type="inner" alias="ah">
      <filter type="and">
        <condition attribute="msdyn_streamsource" operator="eq" uiname="192440000"/>
      </filter>
    </link-entity>
  </entity>
</fetch>
```

FetchXML for voice provisioning state

XML

```
<fetch>
  <entity name="msdyn_ocprovisioningstate">
    <link-entity name="msdyn_ocvoicechannelsetting" from="msdyn_ocvoicechannelsettingid"
to="msdyn_voicechannelsettingid" link-type="inner" alias="ac">
      <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ad">
        <filter type="and">
          <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test Voice Workstream 1"
uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}" />
        </filter>
      </link-entity>
    </link-entity>
  </entity>
</fetch>
```

Verify your migration

After you import the unified routing-related configuration data successfully from the source to target organization, perform the following steps in the target organization:

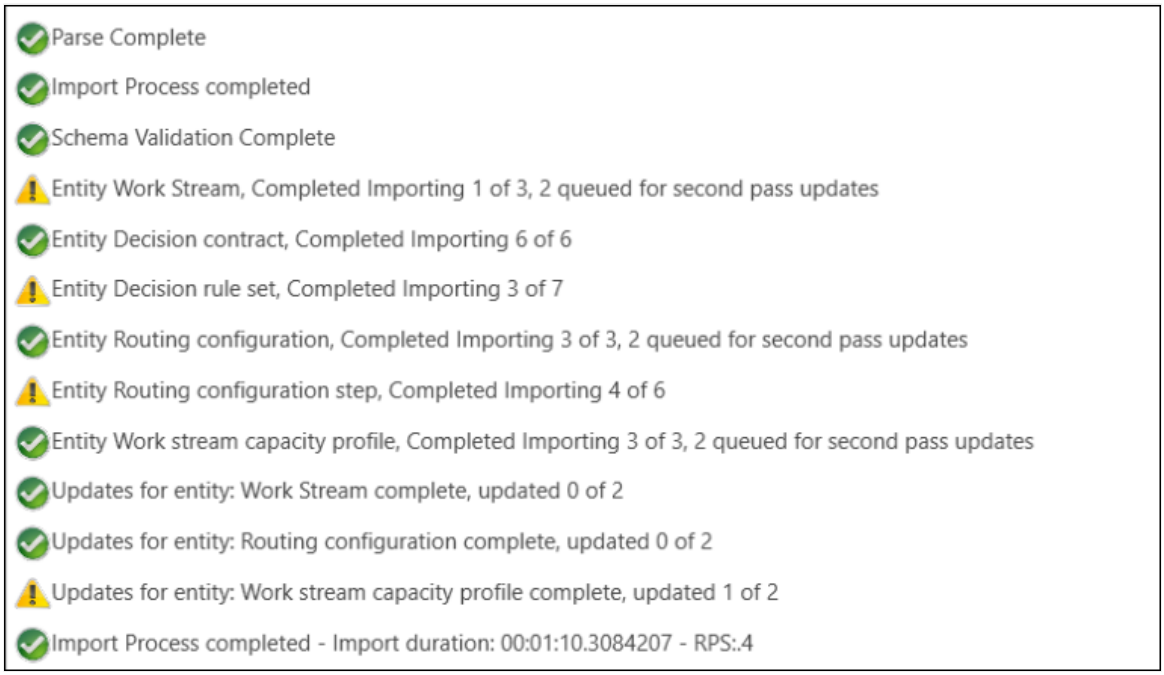
1. In the UI, make sure that the voice channel configuration and rulesets are rendered properly and don't display errors.
2. If skills and rating values are used in unified routing rulesets, then you need to manually link, associate, or create the users, bookable resources, and bookable resources characteristics records.
3. If capacity profiles are used in rulesets and workstreams for unified routing, then you need to manually link, associate, or create the users, bookable resources, and bookable resources capacity profile records.

Considerations for export and import of data

To troubleshoot any issues that you might face during migration, check the log files as follows:

- When you import data into the target organization, if you see yellow warning symbols, then check the following logs in the Configuration Migration tool:
  - **Login_ErrorLog.log**: Provides information about any issues you had when you signed in to the organization using the Configuration Management tool.
  - **DataMigrationUtility.log**: Provides information about the tasks performed using the tool during the last migration.
  - **ImportDataDetail.log**: Provides information about the data imported by the tool in the last data import.

  More information: Troubleshoot configuration data migration issues using log files



- If the logs contain network errors, then repeat the import process.

  Here's an example:

```
Time: 11:46:09 PM
Error: There was no endpoint listening at
`https://www.contoso.com/XRMServices/2011/Organization.svc/web?SDKClientVersion=9.2.46.5279` that
could accept the message. This is often caused by an incorrect address or SOAP action. See
InnerException, if present, for more details.
Stack Trace: Service stack trace:
```

See also

Migrate configuration for records based on unified routing

Migrate configuration data for SMS channel

Article • 09/18/2023

Use the Configuration Migration tool to migrate the configurations from the source organization to the target organization for SMS.

For information on how to use the Configuration Migration tool, see the following articles:

- Download Configuration Migration tool
- How the Configuration Migration tool works

Prerequisites

The following prerequisites must be met:

- In the source environment, if a unified routing ruleset refers to the following, then ensure that they exist in the target organization before you proceed with the migration:
  - Custom entities
  - Attributes
  - Relationships
  - Option sets
  - Lookup values
- Ensure that the user who performs the migration has the required privileges on the following unified routing entities in the source and target environments:
  - Workstream (`msdyn_liveworkstream`)
  - Channel configuration (`msdyn_omnichannelconfiguration`)
  - Operating hours (`msdyn_operatinghour`)
  - Characteristic (`characteristic`)
  - Rating Model (`rating model`)
  - Rating Value (`ratingvalue`)
  - Capacity Profile (`msdyn_capacityprofile`)
  - Queue (`queue`)
  - Decision contract (`msdyn_decisioncontract`)
  - Decision ruleset (`msdyn_decisionruleset`)
  - Assignment configuration (`msdyn_assignmentconfiguration`)
  - Assignment configuration Step (`msdyn_assignmentconfigurationstep`)
  - Routing configuration (`msdyn_routingconfiguration`)
  - Routing configuration step (`msdyn_routingconfigurationstep`)
  - Workstream capacity profile (`msdyn_liveworkstreamcapacityprofile`)
  - Context variable (`msdyn_ocliveworkstreamcontextvariable`)
  - Quick replies (`msdyn_cannedmessages`)
  - Tags (`msdyn_octags`)

> **Important**
>
> The migration of the account, channel provider, phone number, bot configuration, and AI and analytics settings is not in scope.

Migrate SMS configuration

You must perform the steps in the order they're listed to migrate your configuration data successfully. Use the information in the tables and refer to the corresponding sample schemas for each configuration.

1. Migrate configuration using a solution
2. Migrate configuration for skill-based routing
3. Migrate configuration for capacity profiles
4. Migrate configuration for SMS queues
5. Migrate configuration for SMS workstreams
6. Migrate configuration for SMS channels
7. Verify your migration
8. Troubleshoot migration of data

Migrate configuration using a solution

If you use custom session templates and notifications in your SMS routing setup, perform the steps outlined in Migrate configuration using a solution.

Migrate skill-based configuration

If skill-based routing rulesets are used in your SMS routing setup, perform the steps outlined in Export and import data for skill-based routing. Make sure to adjust any filtering fetch xml appropriately for SMS.

Migrate configuration for capacity profiles

If you have configured capacity profiles in your SMS routing setup, perform the steps outlined in Export and import data for capacity profiles. Make sure to adjust any filtering fetch xml appropriately for SMS.

Migrate configuration for SMS queues

For migrating queues for SMS, perform the steps outlined in Migrate data for unified routing-based record queues. Make sure to adjust any filtering fetch xml appropriately for SMS.

Migrate configuration for SMS workstreams

1. Use the Configuration Migration tool to create the schema and export data from the source organization for SMS workstreams.

    - **Entity display name**: When you create the schema, select the entities in the same sequence as mentioned in the table.
    - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't need to select the out-of-the-box system defined attributes like Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes, if necessary.
    - **Use FetchXML to filter records**: For each entity, use the appropriate FetchXML query that's mentioned in the following table to get single, multiple, or all records based on your requirement. For single or multiple records, you need to use source organization to get the correct name in uiname and GUID in value. If required, you can use the **ADVANCED FIND** menu item to construct the appropriate FetchXML query.
    - **Configure import settings**: For the Decision contract entity, ensure that you select the **Do not update existing records** checkbox.

2. Ensure that the workstreams that are referred in the configuration of the SMS channels are included in the migration.

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
1.	Workstream (msdyn_liveworkstream)	• API Key (msdyn_apikey) • API Key Version Number (msdyn_apikeyversionnumber) • Allow Automated Messages (msdyn_enableautomatedmessages) Allowed Presences (msdyn_allowedpresences) • Assign WorkItem After Decline or Timeout (msdyn_assignworkitemafterdecline) • Auto-close after inactivity (msdyn_autocloseafterinactivity) • Block capacity for wrap up state (msdyn_blockcapacityforwrapup) • Bot queue (msdyn_bot_queue) • Bot rule (msdyn_bot_rule) • Bot user (msdyn_bot_user) • CallbackPreviewDialing (msdyn_notificationtemplate_callback_previewdialing) • Connectors (msdyn_connectorsurl) • Consult (msdyn_notificationtemplate_consult) • Conversation mode of chat channels (msdyn_conversationmode) • Customer ID (msdyn_customerid) • Customer Disconnect Hold Duration For Open Conversation (msdyn_customerdisconnectholddurationforopenconversation) • Capacity (msdyn_capacityrequired) • Capacity format (msdyn_capacityformat) • Channel (msdyn_streamsource) • Contract Id (msdyn_routingcontractid) • Default (msdyn_sessiontemplate_default) • Default Queue (msdyn_defaultqueue) • Direction (msdyn_direction) • Enable selecting from push-based work streams (msdyn_enableselectingfrompushbasedworkstreams) • Entity (msdyn_masterentityroutingconfigurationid) • FallBack Language (msdyn_fallbacklanguage) • Follow-up after waiting (msdyn_followupafterwaiting) • Handling Time Threshold (msdyn_handlingtimethreshold) • Incoming authenticated (msdyn_notificationtemplate_incoming_auth) • Incoming unauthenticated (msdyn_notificationtemplate_incoming_unauth) • Is Default (msdyn_isdefault) • Keep same agent for entire conversation (msdyn_enableagentaffinity) • Last Validation On (msdyn_lastvalidationon) • Last Validation Status (msdyn_lastvalidationstatus) • Matching Logic (msdyn_matchinglogic) • Max Concurrency (msdyn_maxconcurrentconnection) • Mode (msdyn_mode) • Name (msdyn_name) • Notification (msdyn_notification) • Notification scenario placeholder (msdyn_notificationscenarioplaceholder) • Outbound queue (msdyn_outboundqueueid) • Record Identification Rule (msdyn_recordidentificationrule) • Record Identification Validation Rule (msdyn_recordidentificationvalidationrule) • Restrict download of recording (msdyn_restrictdownloadrecording) • Restrict download of transcript (msdyn_restrictdownloadtranscript) • Screen pop timeout (msdyn_screenpoptimeout) • Screen pop timeout (msdyn_screenpoptimeout_optionSet) • Secure API Key (msdyn_secureapikey)	Sample 1: All SMS workstreams Sample 2: Single SMS workstream Sample 3: Multiple SMS workstreams

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
		• Skill Attachment Rules Count (msdyn_skillattachmentrulescount) • Skill Attachment Rules Count (Last Updated On) (msdyn_skillattachmentrulescount_date) • Skill Attachment Rules Count (State) (msdyn_skillattachmentrulescount_state) • Session scenario placeholder (msdyn_sessionscenarioplaceholder) • SupervisorAssign (msdyn_notificationtemplate_supervisorassign) • Transfer (msdyn_notificationtemplate_transfer) • Waiting Time Threshold (msdyn_waitingtimethreshold) • Work Distribution Mode (msdyn_workdistributionmode) • Work Stream (msdyn_liveworkstreamid)	
2.	Context Variable (msdyn_ocliveworkstreamcontextvariable)	• Name (msdyn_name) • Relation Ship Name (msdyn_relationshipname) • Type (msdyn_datatype) • Work stream (msdyn_liveworkstreamid) • IsList (msdyn_islist) • Modifiable (msdyn_ismodifiable) • Display Name (msdyn_displayname) • Displayable (msdyn_isdisplayable) • Entity Logical Name (msdyn_entitylogicalname) • Context variable (msdyn_ocliveworkstreamcontextvariableid) • Status (statecode) • Status Reason (statuscode) • System Defined (msdyn_issystemdefined)	Sample 1: Context Variables for all SMS workstreams Sample 2: Context variables for a single SMS workstream Sample 3: Context Variables for multiple SMS workstreams
3.	Decision contract (msdyn_decisioncontract)	• Contract definition (msdyn_contractdefinition) • Decision contract (msdyn_decisioncontractid) • Name (msdyn_name) • Unique name (msdyn_uniquename)	Sample 1: Decision contract for all SMS workstreams Sample 2: Decision contract for a single SMS workstream Sample 3: Decision contract for multiple SMS workstreams
4.	Decision rule set (msdyn_decisionruleset)	• AI builder model (msdyn_aibmodelid) • Authoring mode (msdyn_authoringmode) • Decision rule set (msdyn_decisionrulesetid) • Description (msdyn_description) • Input contract (msdyn_inputcontractid) • Is input collection (msdyn_isinputcollection) • ML model type (msdyn_mlmodeltype) • Name (msdyn_name) • Output contract (msdyn_outputcontractid) • Rule set definition (msdyn_rulesetdefinition) • Rule set type (msdyn_rulesettype)	Sample 1: Decision ruleset for all SMS workstreams Sample 2: Decision ruleset for a single SMS workstream

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
		• Unique name (msdyn_uniquename)	Sample 3: Decision ruleset for multiple SMS workstreams
5.	Routing configuration (msdyn_routingconfiguration)	• Is active configuration (msdyn_isactiveconfiguration) • Name (msdyn_name) • Routing configuration (msdyn_routingconfigurationid) • Unique name (msdyn_uniquename) • Workstream (msdyn_liveworkstreamid)	Sample 1: Routing configuration for all SMS workstreams Sample 2: Routing configuration for a single SMS workstream Sample 3: Routing configuration for multiple SMS workstreams
6.	Routing configuration step (msdyn_routingconfigurationstep)	• Name (msdyn_name) • Routing configuration (msdyn_routingconfigurationid) • Routing configuration step (msdyn_routingconfigurationstepid) • Rule set (msdyn_rulesetid) • Step order (msdyn_steporder) • Step type (msdyn_type) • Unique name (msdyn_uniquename)	Sample 1: Routing configuration step for all SMS workstreams Sample 2: Routing configuration step for a single SMS workstream Sample 3: Routing configuration step for multiple SMS workstreams
7.	Workstream capacity profile (msdyn_liveworkstreamcapacityprofile)	• Capacity Profile (msdyn_capacityprofile_id) • Name (msdyn_name) • Workstream (msdyn_workstream_id) • Workstream Capacity profile (msdyn_liveworkstreamcapacityprofileid)	Sample 1: Workstream capacity profile for all SMS workstreams Sample 2: Workstream capacity profile for a single SMS workstream

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)	Use FetchXML to filter records
			Sample 3: Workstream capacity profile for multiple SMS workstreams
8.	Tag (msdyn_octag)	• Name (msdyn_name) • Tag (msdyn_octagid)	

3. Generate the schema and save it.
4. Export the data and generate the compressed (zip) file.
5. Use the Configuration Migration tool, and select the option to import data, and select the compressed file.

> **Important**
>
> When you fetch decision rulesets (msdyn_decisionrulesets) containing context variables, some decision rulesets are created without the dependency mappings. To work around this, perform the following steps:
>
> 1. Import data for all entities including the decision ruleset entity (msdyn_decisionrulesets).
> 2. Import data for the decision ruleset entity again. This step ensures that all dependency mappings for the decision rulesets are imported.

For sample schema to get all the required records, see Sample schema for SMS workstream.

FetchXML for workstream entity

Sample 1: All SMS workstreams

XML

```
<fetch distinct="true">
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_mode" operator="eq" value="717210001" />
            <condition attribute="msdyn_streamsource" operator="eq" value="192340000" />
        </filter>
    </entity>
</fetch>
```

Sample 2: Single SMS workstream

XML

```
<fetch>
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test SMS workstream 1"
uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}" />
        </filter>
    </entity>
</fetch>
```

Sample 3: Multiple SMS workstreams

XML

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
    <entity name="msdyn_liveworkstream">
        <filter type="and">
            <condition attribute="msdyn_liveworkstreamid" operator="in">
                <value uiname="Test SMS workstream 1" uitype="msdyn_liveworkstream">{759255C7-7AC8-98E0-
7E3E-59A7F0312ABC}</value>
                <value uiname="Test SMS workstream 2" uitype="msdyn_liveworkstream">{E6246229-33AC-5A9E-
2FFE-51668AD44098}</value>
            </condition>
        </filter>
    </entity>
</fetch>
```

FetchXML for context variables entity

Sample 1: All SMS workstreams context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" >
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="aa" >
            <filter type="and" >
                <condition attribute="msdyn_streamsource" operator="eq" value="192340000" />
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Single SMS workstream context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" >
        <filter type="and" >
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="SMS workstream"
uitype="msdyn_liveworkstream" value="{D3A1F09D-51A0-A6B7-266D-58E1BDB97B53}" />
        </filter>
    </entity>
</fetch>
```

Sample 3: Multiple SMS workstreams context variables

XML

```
<fetch>
    <entity name="msdyn_ocliveworkstreamcontextvariable" >
        <filter type="or" >
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="SMS workstream"
uitype="msdyn_liveworkstream" value="{D3A1F09D-51A0-A6B7-266D-58E1BDB97B53}" />
            <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="SMS workstream 1"
uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
        </filter>
    </entity>
</fetch>
```

FetchXML for decision contract entity

Sample 1: Decision contract for all SMS workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="an" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="an" operator="eq" value="192340000"
/>
            </filter>
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="bd" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="bd" operator="eq" value="192340000"
/>
            </filter>
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="bk" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="bk" operator="eq" value="192340000"
/>
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bh" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bi" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bj" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bk" />
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bo" >
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bp" />
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bs" >
            <link-entity name="msdyn_masterentityroutingconfiguration" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bt" />
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Decision contract for a single SMS workstream

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq" uiname="SMS
workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
            <filter type="and" >
            <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq" uiname="SMS
```

```
workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
            <filter type="and" >
            <condition attribute="msdyn_liveworkstreamid" entityname="bk" operator="eq" uiname="SMS
workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bh" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bi" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bj" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bk" />
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Decision contract for multiple SMS workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisioncontract" >
        <filter type="or" >
            <filter type="and" >
                <filter type="or" >
                    <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq"
uiname="SMS workstream 1" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
                    <condition attribute="msdyn_liveworkstreamid" entityname="an" operator="eq"
uiname="SMS workstream 2" uitype="msdyn_liveworkstream" value="{bb3cf09d-51a0-f56b-211b-58e1bdb97b44}" />
                </filter>
            </filter>
            <filter type="and" >
                <filter type="or" >
                    <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq"
uiname="SMS workstream 1" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
                    <condition attribute="msdyn_liveworkstreamid" entityname="bd" operator="eq"
uiname="SMS workstream 2" uitype="msdyn_liveworkstream" value="{bb3cf09d-51a0-f56b-211b-58e1bdb97b44}" />
                </filter>
            </filter>
            <filter type="and" >
                <filter type="or" >
                    <condition attribute="msdyn_liveworkstreamid" entityname="bk" operator="eq"
uiname="SMS workstream 1" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
                    <condition attribute="msdyn_liveworkstreamid" entityname="bk" operator="eq"
uiname="SMS workstream 2" uitype="msdyn_liveworkstream" value="{bb3cf09d-51a0-f56b-211b-58e1bdb97b44}" />
                </filter>
            </filter>
        </filter>
        <link-entity name="msdyn_liveworkstream" from="msdyn_routingcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="an" />
        <link-entity name="msdyn_decisionruleset" from="msdyn_inputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="ba" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
```

```
to="msdyn_decisionrulesetid" link-type="outer" alias="bb" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bc" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bd" />
                </link-entity>
            </link-entity>
        </link-entity>
        <link-entity name="msdyn_decisionruleset" from="msdyn_outputcontractid"
to="msdyn_decisioncontractid" link-type="outer" alias="bh" >
            <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="bi" >
                <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="bj" >
                    <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="bk" />
                </link-entity>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for decision ruleset entity

Sample 1: Decision ruleset for all SMS workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_mode" entityname="af" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" entityname="af" operator="eq" value="192340000"
/>
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Decision ruleset for a single SMS workstream

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
        <filter type="or" >
            <filter type="and" >
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="SMS
workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
```

```
    </entity>
</fetch>
```

Sample 3: Decision ruleset for multiple SMS workstreams

XML

```
<fetch distinct="true" >
    <entity name="msdyn_decisionruleset" >
        <filter type="or" >
            <filter type="or" >
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="SMS
workstream" uitype="msdyn_liveworkstream" value="{d3a1f09d-51a0-a6b7-266d-58e1bdb97b53}" />
                <condition attribute="msdyn_liveworkstreamid" entityname="af" operator="eq" uiname="SMS
workstream 1" uitype="msdyn_liveworkstream" value="{f9e18e67-d1a8-ed11-aad1-00224805c057}" />
            </filter>
        </filter>
        <link-entity name="msdyn_routingconfigurationstep" from="msdyn_rulesetid"
to="msdyn_decisionrulesetid" link-type="outer" alias="ad" >
            <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="outer" alias="ae" >
                <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="outer" alias="af" />
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for routing configuration entity

Sample 1: Routing configuration for all SMS workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" operator="eq" value="192340000" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Routing configuration for a single SMS workstream

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test SMS workstream 1"
uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312ABC}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Routing configuration for multiple SMS workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfiguration">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="in">
                    <value uiname="Test SMS Workstream 1" uitype="msdyn_liveworkstream">{759255C7-7AC8-
98E0-7E3E-59A7F0312ABC}</value>
                    <value uiname="Test SMS Workstream 2" uitype="msdyn_liveworkstream">{E6246229-33AC-
5A9E-2FFE-51668AD44098}</value>
                </condition>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for routing configuration step entity

Sample 1: Routing configuration step for all SMS workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
                <filter type="and">
                    <condition attribute="msdyn_mode" operator="eq" value="717210001" />
                    <condition attribute="msdyn_streamsource" operator="eq" value="192340000" />
                </filter>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Routing configuration step for a single SMS workstream

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
                <filter type="and">
                    <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test SMS
workstream 1" uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}" />
                </filter>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Routing configuration step for multiple SMS workstreams

XML

```
<fetch>
    <entity name="msdyn_routingconfigurationstep">
        <link-entity name="msdyn_routingconfiguration" from="msdyn_routingconfigurationid"
to="msdyn_routingconfigurationid" link-type="inner" alias="ak">
            <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid"
to="msdyn_liveworkstreamid" link-type="inner" alias="al">
```

```
                <filter type="and">
                    <condition attribute="msdyn_liveworkstreamid" operator="in">
                        <value uiname="Test SMS workstream 1" uitype="msdyn_liveworkstream">{759255C7-
7AC8-98E0-7E3E-59A7F0312ABC}</value>
                        <value uiname="Test SMS workstream 2" uitype="msdyn_liveworkstream">{E6246229-
33AC-5A9E-2FFE-51668AD44098}</value>
                    </condition>
                </filter>
            </link-entity>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for workstream capacity profile entity

Sample 1: Workstream capacity profile for all SMS workstreams

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id"
link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_mode" operator="eq" value="717210001" />
                <condition attribute="msdyn_streamsource" operator="eq" value="192340000" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 2: Workstream capacity profile for a single SMS workstream

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id"
link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="Test SMS workstream 1"
uitype="msdyn_liveworkstream" value="{759255C7-7AC8-98E0-7E3E-59A7F0312EFC}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Sample 3: Workstream capacity profile for multiple SMS workstreams

XML

```
<fetch>
    <entity name="msdyn_liveworkstreamcapacityprofile">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_workstream_id"
link-type="inner" alias="am">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="in">
                    <value uiname="Test SMS Workstream 1" uitype="msdyn_liveworkstream">{759255C7-7AC8-
98E0-7E3E-59A7F0312EFC}</value>
                    <value uiname="Test SMS Workstream 2" uitype="msdyn_liveworkstream">{E6246229-33AC-
5A9E-2FFE-51668AD44215}</value>
                </condition>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Migrate configuration for SMS channels

Assume that the workstream must exist whether it was created manually or previously migrated to the destination organization.

To migrate data for SMS channels

1. Use the Configuration Migration tool to create the schema and export data from the source organization for the SMS channel and related entities.

   - **Entity display name**: When you create the schema, select the entities in the sequence as mentioned in the table.
   - **Attribute display name**: We recommend that you select the attributes defined in the following table. You don't have to select the system-defined attributes, such as Created By, Created On, Modified By, Modified On, and Owner. You can select custom attributes if necessary.

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)
1.	SMS Number Setting (msdyn_ocsmschannelsetting)	FetchXML to filter records for SMS channel settings **Note:** - Replace the value for msdyn_liveworkstream in the condition section. - You need to include Phone Number (msdyn_phonenumberid) column even though data is invalid, as the records in Phone Number table are environment-specific and can't be migrated. You need to fix phone number manually in destination environment after migration. If you aren't allowed to perform this action for any reason, you can manually edit data.xml file inside the exported zip file and replace its value with the correct phone number GUID in the destination environment. - Don't include Survey (msdyn_postconversationsurvey) and Survey (msdyn_postconversationsurveyseparatebotsurvey) columns as survey records are synced with Dynamics 365 Customer Voice in each environment, so they can't be migrated. - Ensure as part of the entity declaration in the schema that the plugin is disabled. (disableplugins="false") • Bot Survey (msdyn_postconversationsurveybotsurvey) • Enable (msdyn_postconversationsurveyenable) • Enable file attachments for agents (msdyn_enablefileattachmentforagents) • Enable file attachments for customers (msdyn_enablefileattachmentforcustomers) • Message (msdyn_postconversationsurveybotsurveymessagetext) • Message (msdyn_postconversationsurveymessagetext) • Name (msdyn_name) • ocsmschannelsetting (msdyn_ocsmschannelsettingid) • Operating hours (msdyn_operatinghoursid) • Phone Number (msdyn_phonenumberid) • SMS number language (msdyn_language) • Survey Mode (msdyn_postconversationsurveybotsurveymode) • Survey Mode (msdyn_postconversationsurveymode) • Work stream (msdyn_liveworkstreamid)
2.	Localization (msdyn_oclocalizationdata)	FetchXML to filter records for SMS channel localizations • Automated message (msdyn_systemmessageid) • Default Localized Text (msdyn_defaultlocalizedtext) • Entity Column Name (msdyn_entitycolumnname) • Entity Name (msdyn_entityname) • Entity Record ID (msdyn_entityrecordid) • Is Default (msdyn_isdefault) • Language Code (msdyn_customerlanguageid) • Language Code (msdyn_languagecode) • Localization (msdyn_oclocalizationdataid) • Localized text (msdyn_localizedtext) • Organization ID (organizationid) • Status (statecode)

S.No.	Entity display name (Logical name)	Attribute display name (Logical name)
		• Status Reason (statuscode)
3.	Message (msdyn_ocsystemmessage)	• Channel (msdyn_streamsource) • Default language (msdyn_defaultlanguage) • Instance ID (msdyn_instanceid) • Message (msdyn_ocsystemmessageid) • Message description (msdyn_messagedescription) • Message recipient (msdyn_messagereceiver) • Message template trigger (msdyn_messagetemplatetrigger) • Message Text (msdyn_messagetext) • Message trigger (msdyn_systemmessageeventtype) • Message type (msdyn_messagetype) • Name (msdyn_name) • Organization ID (organizationid) • Status (statecode) • Status Reason (statuscode)

2. Generate the schema and save it.
3. Export the data and generate the compressed (zip) file.
4. Use the Configuration Migration tool, select the option to import data, and then select the compressed file.

For sample schema to get all the required records, see Sample schema for SMS channel.

FetchXML for SMS channel settings

XML

```
<fetch>
    <entity name=" msdyn_ocsmschannelsetting">
        <link-entity name="msdyn_liveworkstream" from="msdyn_liveworkstreamid" to="msdyn_liveworkstreamid"
link-type="inner" alias="ab">
            <filter type="and">
                <condition attribute="msdyn_liveworkstreamid" operator="eq" uiname="ALM SMS Test
Workstream" uitype="msdyn_liveworkstream" value="{87bf4384-a02f-4802-8be7-1d6884a7e73f}" />
            </filter>
        </link-entity>
    </entity>
</fetch>
```

FetchXML for SMS channel localizations

XML

```
<fetch>
    <entity name="msdyn_oclocalizationdata">
        <link-entity name="msdyn_ocsystemmessage" from="msdyn_ocsystemmessageid"
to="msdyn_systemmessageid" link-type="inner" alias="ah">
            <filter type="and">
                <condition attribute="msdyn_streamsource" operator="eq" value="192360000"/>
            </filter>
        </link-entity>
    </entity>
</fetch>
```

Verify your migration

After you import the unified routing-related configuration data successfully from the source to target organization, perform the following steps in the target organization:

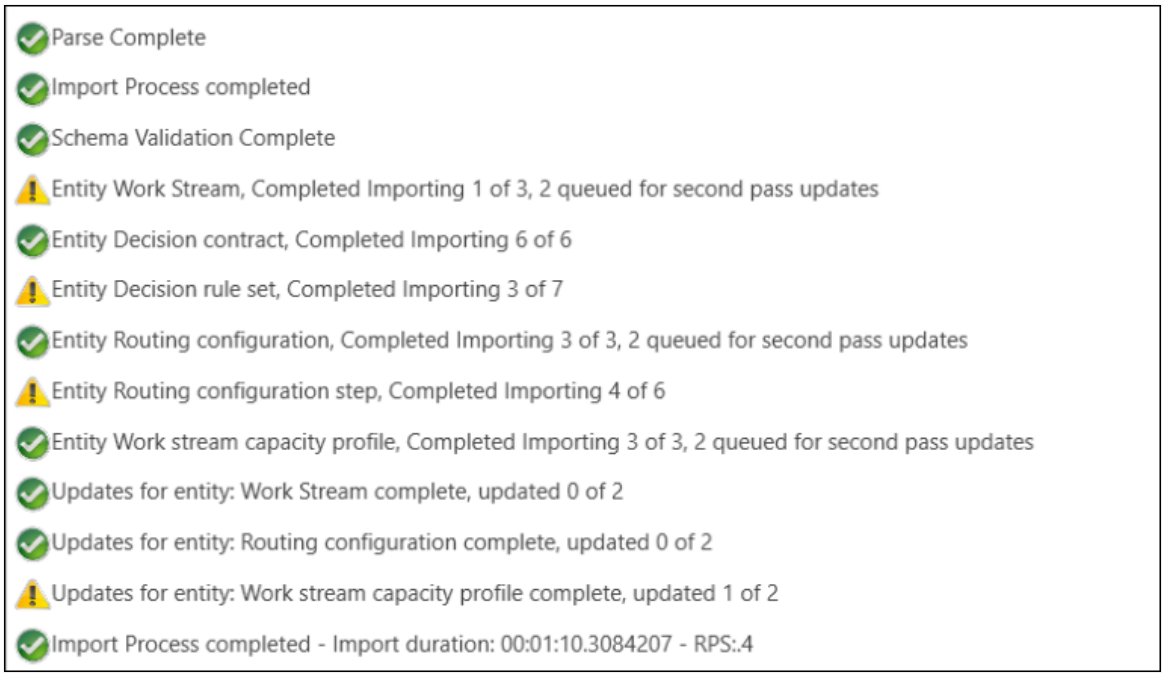
1. In the UI, make sure that the unified routing configuration and rulesets are rendered properly and don't display errors.
2. If skills and rating values are used in unified routing rulesets, then you need to manually link, associate, or create the users, bookable resources, and bookable resources characteristics records.
3. If capacity profiles are used in rulesets and workstreams for unified routing, then you need to manually link, associate, or create the users, bookable resources, and bookable resources capacity profile records.

Considerations for export and import of data

To troubleshoot any issues that you might face during migration, check the log files as follows:

- When you import data into the target organization, if you see yellow warning symbols, then check the following logs in the Configuration Migration tool:
  - **Login_ErrorLog.log**: Provides information about any issues you had when you signed in to the organization using the Configuration Management tool.
  - **DataMigrationUtility.log**: Provides information about the tasks performed using the tool during the last migration.
  - **ImportDataDetail.log**: Provides information about the data imported by the tool in the last data import.

  More information: Troubleshoot configuration data migration issues using log files

- If the logs contain network errors, then repeat the import process.

  Here's an example:

```
Time: 11:46:09 PM
Error: There was no endpoint listening at
`https://www.contoso.com/XRMServices/2011/Organization.svc/web?SDKClientVersion=9.2.46.5279` that
could accept the message. This is often caused by an incorrect address or SOAP action. See
InnerException, if present, for more details.
Stack Trace: Service stack trace:
```

See also

Migrate configuration for records based on unified routing

Migrate workstreams created in Omnichannel Administration

Article • 07/25/2023

> **ⓘ Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

When will the Omnichannel Administration app be removed?

The rollout of removing the Omnichannel Administration app has started and will be applied region wise. For example, in Canada, the removal is expected to be complete by July 24, and in North America, by August 11, 2023.

Do I need to migrate any records?

If you want to continue to use the workstreams that were created in the Omnichannel Administration app, then you must migrate them to the Customer Service admin center app. The backend tables for the workstreams and the routing services are different in both the apps. The legacy routing service of the deprecated app will also be shut down.

If you are already using Customer Service admin center and unified routing, you don't need to take any action.

How do I know in which app my workstreams were created?

If the workstreams or any related records like rules that you are using are visible in the Customer Service admin center app and routing is working fine, then no migration is needed. The migrated records or records created with the new table structure only are visible in Customer Service admin center.

How do I validate if the migration is successful?

After you have migrated all the workstream configurations from Omnichannel Administration, they'll be available in Customer Service admin center. Use the steps in the following section to do a sanity check.

Use the migration application for legacy workstreams

1. Use the Unified routing migration application.
2. Download the Migrate workstreams for unified routing PDF that is available with the migration utility, and follow the steps to migrate your workstreams.
3. After the migration is complete, open the Customer service admin center app, and perform the following steps to verify that the workstreams are migrated according to your requirement:
   a. Open the route to queue rules and skill identification rules, if any, and verify the migrated rules to make sure that they represent the same rules as what you've configured before migration.
   b. Perform a sanity check by initiating chats and verifying that they are routed to the expected queues.
   c. Configure the work classification rules and any other settings pertaining to unified routing.

> **Important**
>
> After the upgrade, your queues will start using unified routing services for assignment. By default, all existing queues will use the "highest capacity" assignment method for work distribution. You can change the assignment method to round robin or a custom assignment method according to your need. More information: **Set up assignment methods in Customer Service**.

Migrate workstreams for routing records

After upgrading Omnichannel for Customer Service, we recommend that you use the Customer Service admin center app to configure record routing. You can no longer configure record routing in the Omnichannel Administration app because it won't work as expected. The existing workstreams that you created for routing records in the Omnichannel Administration app can't be migrated. Instead, you'll need to recreate them in Customer Service admin center, and then enable them for unified routing.

See also

Overview of unified routing
Configure work classification rulesets
Set up record routing
Get started with Customer Service admin center
FAQ on unified routing

Migrate automatic record creation rules and service-level agreements

Article • 08/29/2023

The migration tool for automatic record creation rules and service-level agreements (SLAs) helps migrate the rules in the web client to Unified Interface. This also includes the conversion of the workflows to Power Automate-based flows.

The migration tool provides the following functionality:

- Ability to run the migration tool multiple times and view the status at any point in time.
- Flexibility to choose the rules in the web client that need to be migrated.
- Messages on potential issues on why a ruled failed the migration process.

The migration tool does not change the functioning of the existing rules or items in the web client and they will continue to run on existing cases as configured. You have the flexibility to decide the actions for the rules.

Prerequisites

- For migrating automatic record creation rules, your environment must have Customer Service version 9.0.20034.20XX or later to opt in for migration.
- For migrating SLAs, your environment must have Customer Service version 9.0.20053.1030 or later to opt in for migration.
- Administrator permissions.

Things to consider

When you perform your migration, you will be able to view detailed results only for rules or items that have failed the premigration check or those that were partially migrated (incomplete).

When you rerun the migration tool, it will pick up any updates or edits in the web client if the rule or item has been:

- Edited in the web client prior to the actual migration.
- Edited in the web client to resolve errors after a failed migration attempt.

The following updates or edits to a rule or item made in the web client will not be considered if:

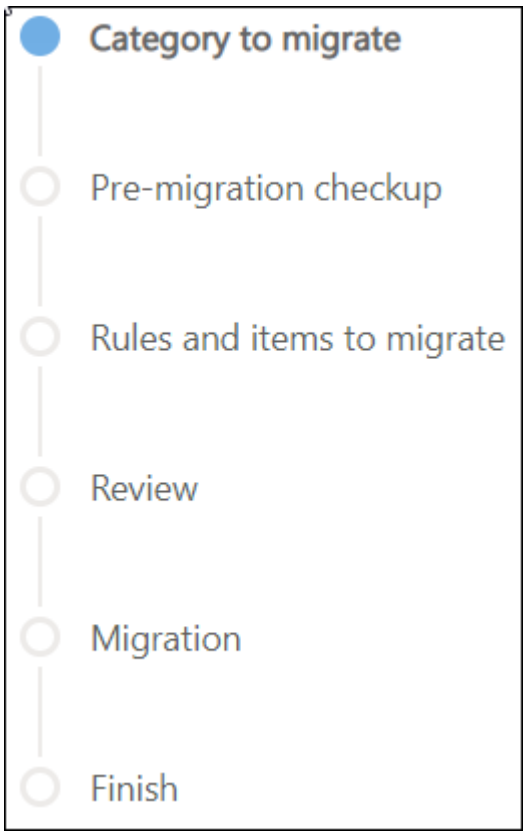
- The rule is edited in the web client after it is successfully migrated to Unified Interface.
- Any edits were made in the migrated rules in Unified Interface as well.

After migrating a rule or item successfully, if you edit it in the web client, the changes will not be visible in Unified Interface. For the edits to be visible in Unified Interface, you must delete the successfully migrated rule or item in Unified Interface and migrate it again from the web client.

To learn about how to create rules in the Customer Service Hub app, see Automatically create or update records in Customer Service Hub and Define service-level agreements.

How the migration process works

The migration progress is indicated on the page as follows; the colored circle indicates the migration stage.



1. **Category to migrate:** Allows you to pick and choose the rules you want to migrate.
2. **Pre-migration checkup:** Provides insights into any potential migration failures you might incur prior to beginning your migration.

3. **Rules and items to migrate:** Allows you to select the rules you want to migrate.
4. **Review** Provides you with the opportunity to go through any rules that have been identified as having errors or issues and fix them prior to migration.
5. **Migration:** Post-migration, allows you to review the successfully migrated rules and rules that failed migration.
6. **Finish:** Provides you with a summary and status page of the successfully migrated rules, pending rules, and rules that failed migration.

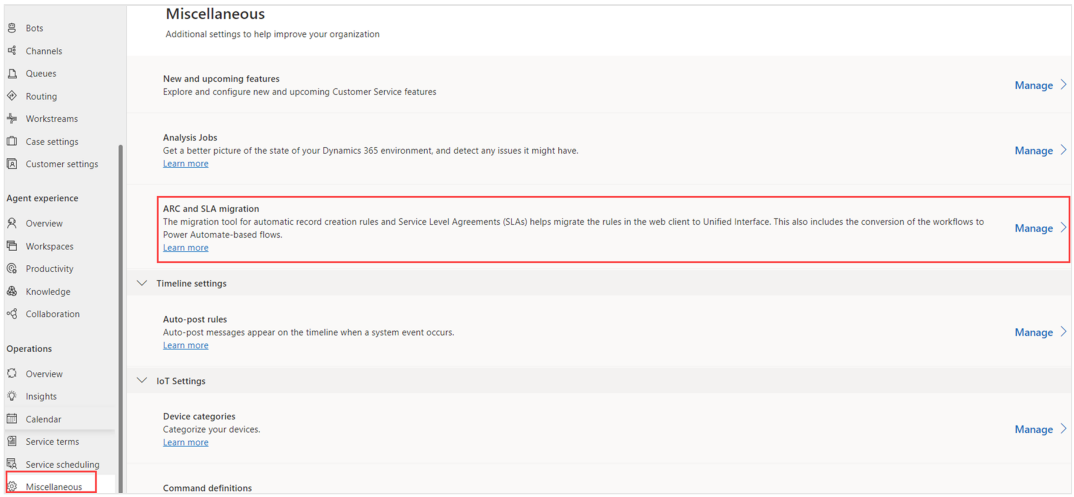
Access the migration tool

1. Go to one of the admin apps, and perform the following steps.

Customer Service admin center

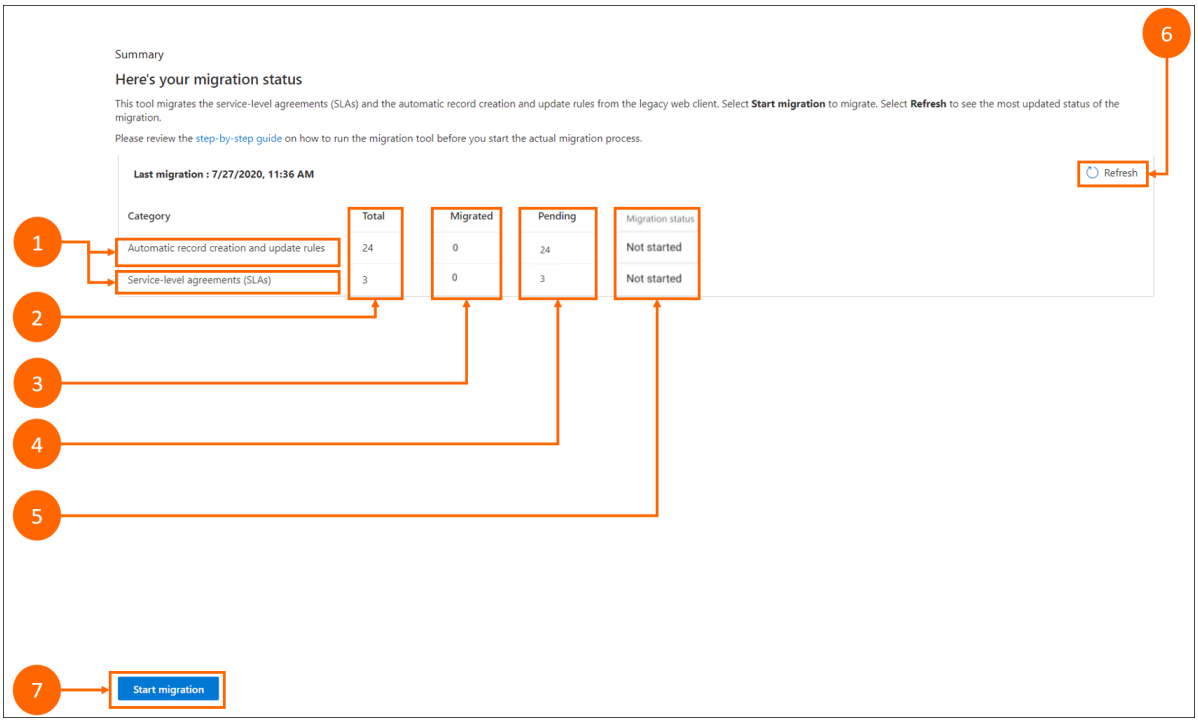
a. In the site map, select **Miscellaneous** in **Operations**. The **Miscellaneous** page appears.

b. In the **ARC and SLA migration** section, select **Manage**.



Migration Summary

When you select **ARC & SLA Migration** in the left pane, the **Summary** page is displayed as follows.



The annotations are explained as follows.

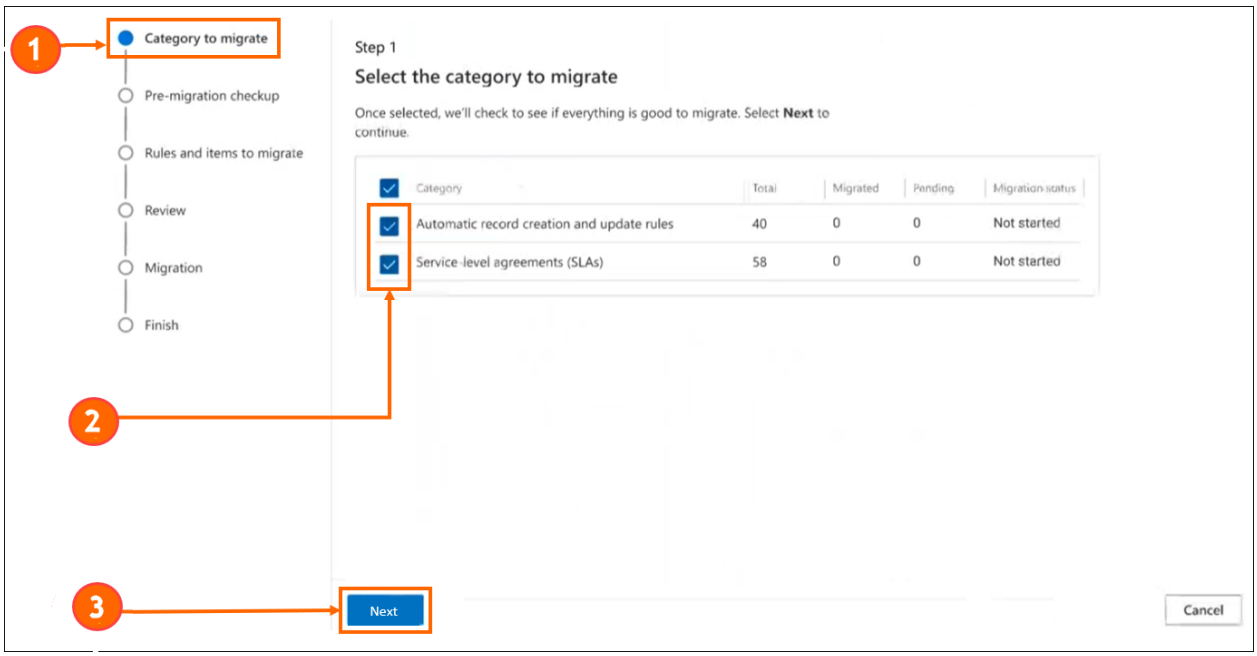
label	Description
1	**Category**: An overview of the automatic record creation rules and SLAs.
2	**Total**: Displays the number of rules available overall in the web client.
3	**Migrated**: Displays the number of rules you have migrated.
4	**Pending**: Displays the number of rules in the web client that are pending migration (includes failed rules, partially or incomplete migrated rules, and rules that have not been attempted).
5	**Migration status**: Displays whether migration has started.
6	**Refresh**: Allows you to update migration status.
7	**Start migration**: Allows you to begin the migration process.

Migrate the automatic record creation rules and SLA items

You can migrate both the automatic record creation rules and SLA items together or separately from the web client. The information in the following sections is organized according to the migration process on the left of the migration pages that leads you through the migration states.

Category to migrate

When you select **Start migration**, the **Step 1** page is displayed. Select the categories that you want to migrate.



The annotations are explained as follows.

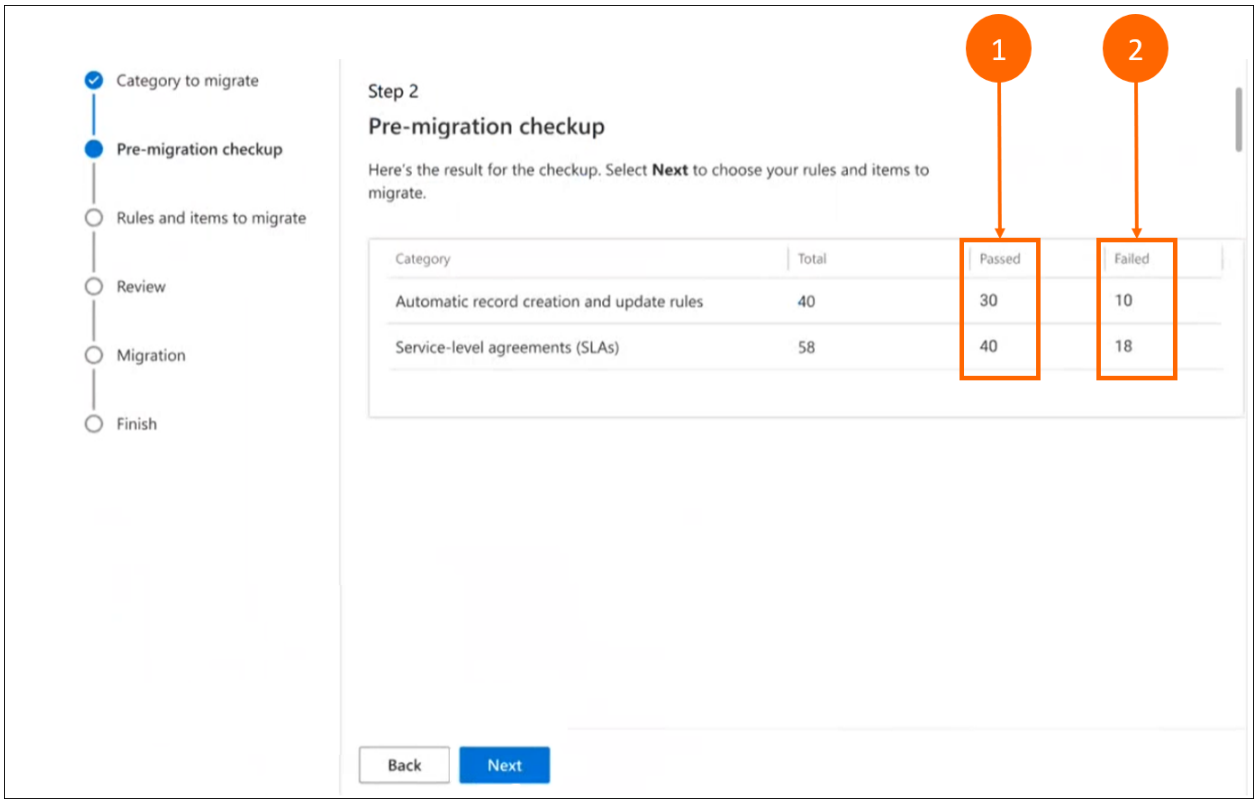
Label	Description
1	A tracker that is displayed on the left, shows you where you are in the migration process at any time.
2	You can migrate the automatic record creation rules and SLAs separately or both at the same time.
3	You must select a category for migration before you can proceed. select **Next** to go to the next stage.

Premigration checkup

The **Step 2** page provides a premigration check that displays what the actual migration results will look like so you can mitigate potential migration failures before you begin.

The check can be done on automatic record creation rules and or SLAs, depending on your selection from the previous screen.

When you run the migration process for the first time, you won't have any insights until you complete the premigration checkup. After the premigration check is complete, the following overview is displayed.



Label	Description
1	The number of rules that will successfully complete migration.
2	The number of rules that might fail the migration.

Rules and items to migrate

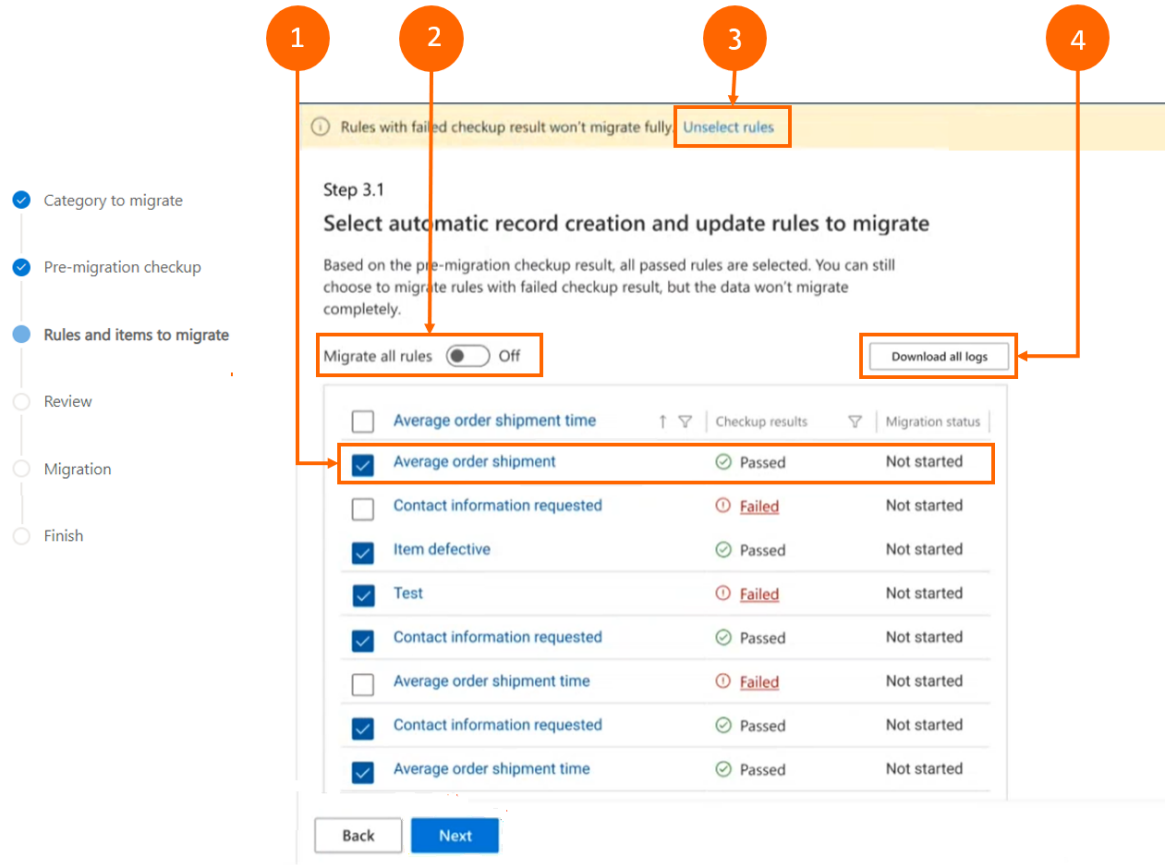
If you have selected both automatic record creation rules and SLAs, the step 3 page is divided into **Step 3.1** and **Step 3.2** pages, one each for automatic record creation rules and SLAs.

By default, the rules and items that successfully complete the premigration check are selected to be migrated. You can select the rules and items that you want to migrate.

The rules and items that fail the premigration check can still be migrated; however, the data will not completely migrate. If you want to migrate both passed and failed rules, use the **Migrate all rules** option to override any current selection and migrate all rules.

Automatic record creation and update rules

In this section, the Step 3.1 page that appears for the rules that you select for migration is shown as an example.



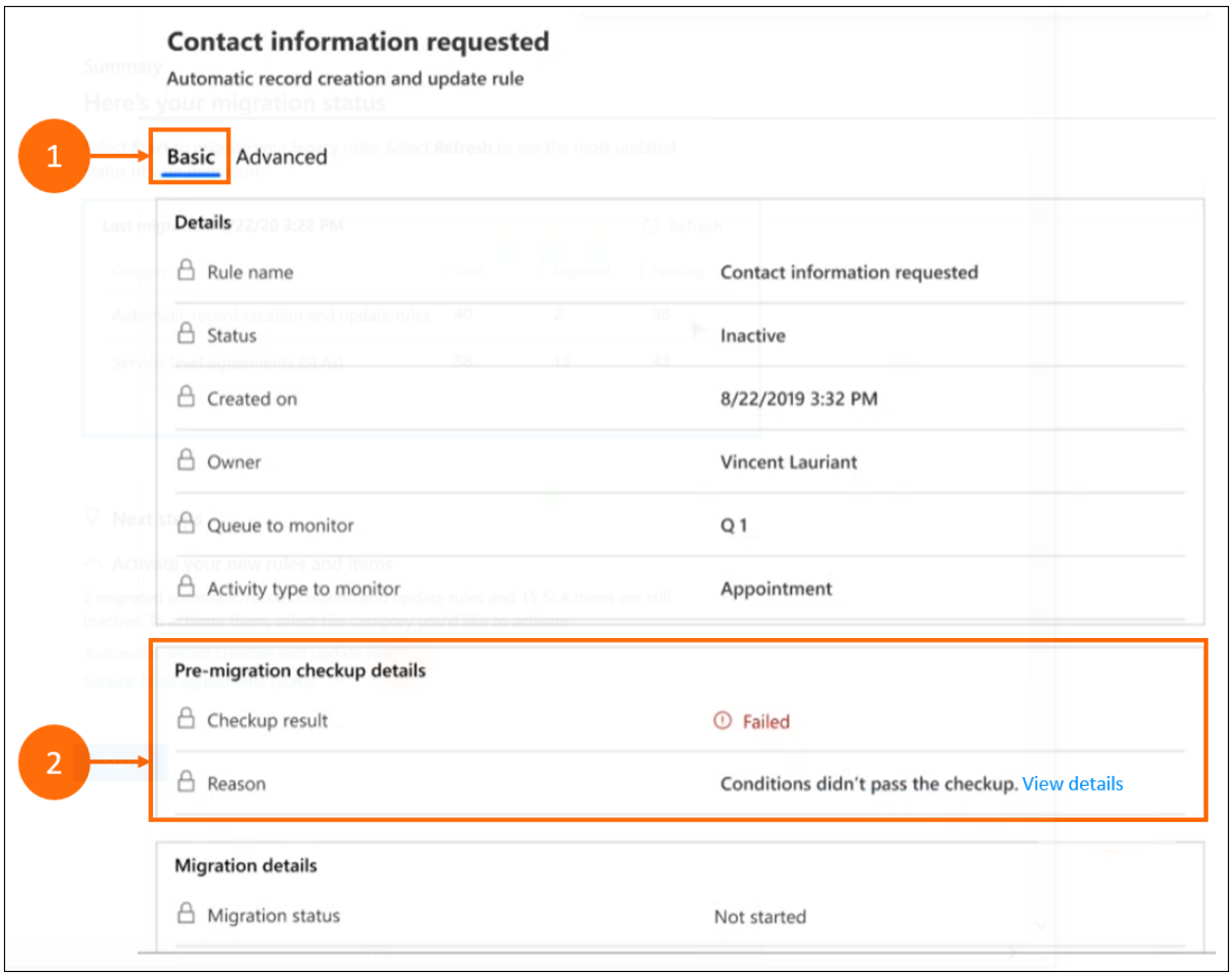
Label	Description
1	Rules that pass are automatically selected for migration. You can clear the selection for any rules that you don't want to migrate. Rules that failed are not selected for migration. To understand why a rule failed, you can select it and view the details about the failure, and then use the information to fix the failure prior to or after migration.
2	**Migrate all rules** provides you the ability to override the current selection to select all rules, regardless of their premigration check result.
3	This alert notifies you that while you can migrate rules that failed the premigration check, the data on failed rules will not migrate completely and provides the option to **unselect rules** that failed.
4	Lets you **download all logs** for review and troubleshooting purposes.

View details of rules that failed

When you select a rule that failed the premigration check, you have a choice of **Basic** and **Advanced** views to understand why a rule failed. You can use this information to either troubleshoot and fix the ruled that failed, or choose to migrate the rule and fix it in Customer Service Hub after migration is complete.

Basic view

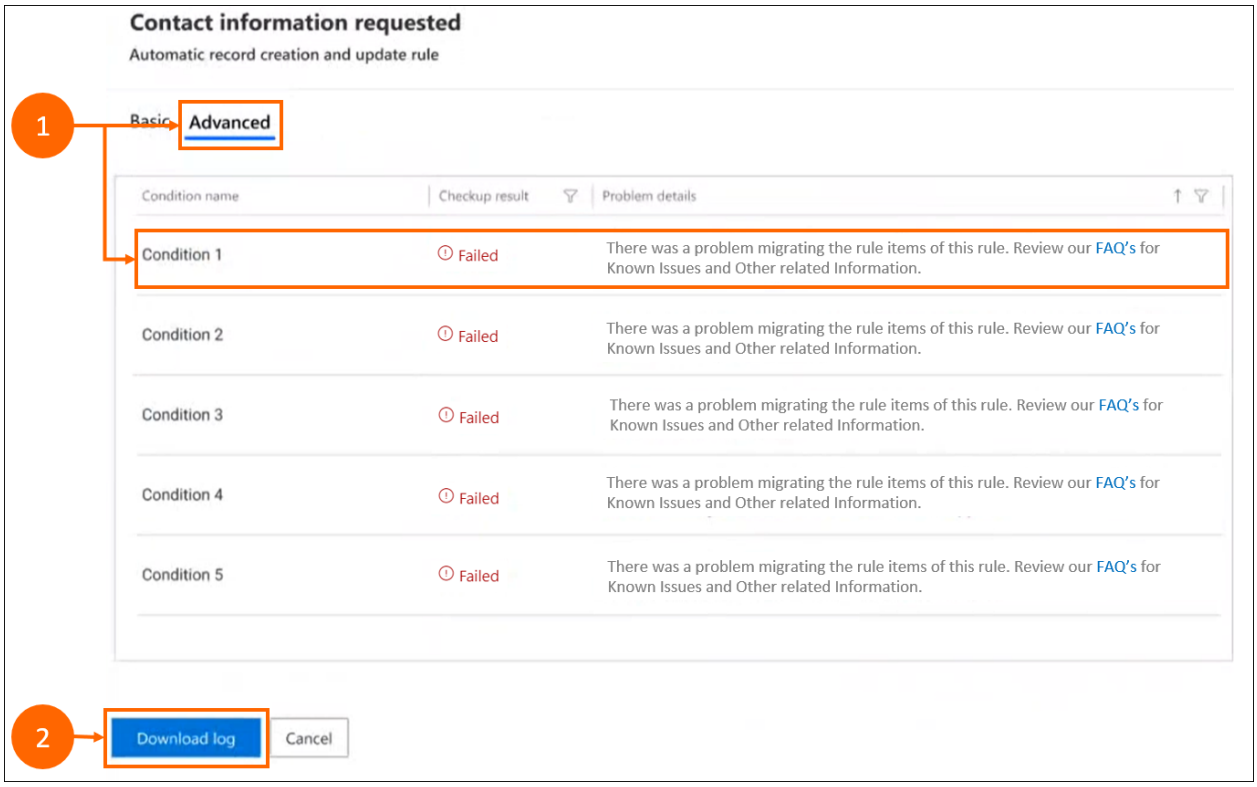
The **Basic** view provides an overview for each individual rule that failed.



Label	Description
1	High-level details on rules that fail.
2	**Pre-migration checkup details** shows results along with details of why a rule failed.

Advanced view

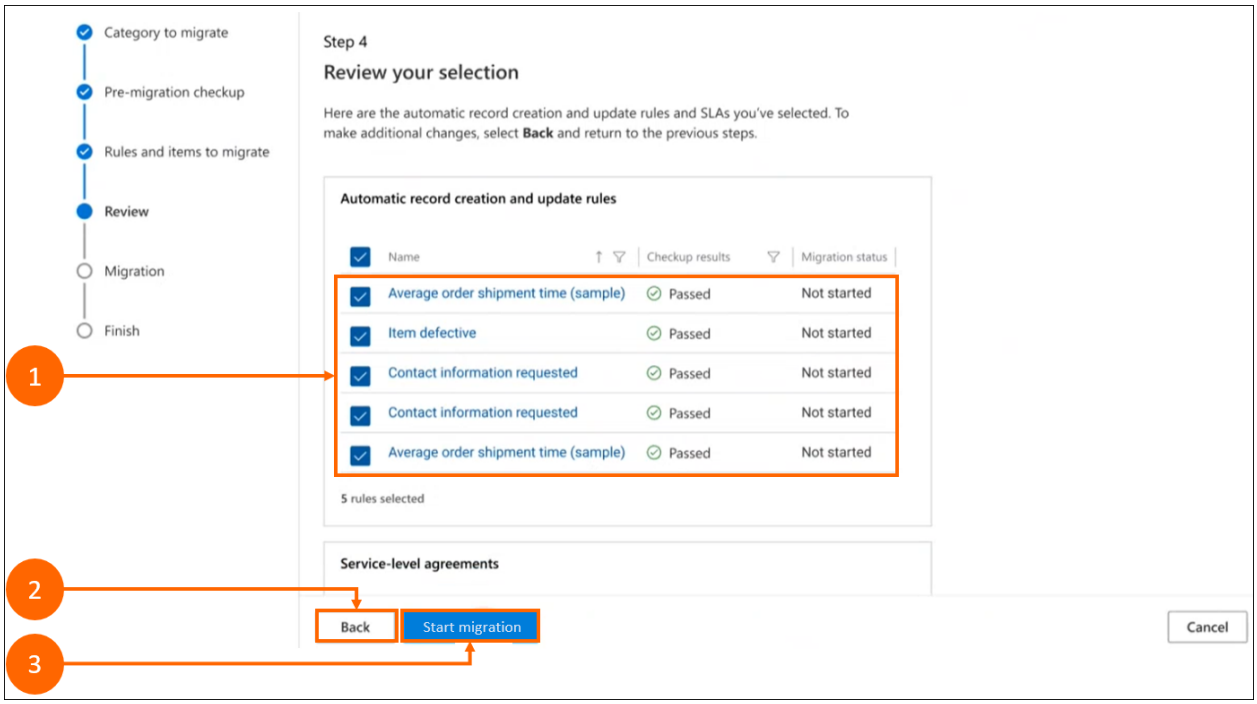
The **Advanced** view provides the problem details on rules that failed.



Label	Description
1	Additional details about why the rule might have failed migration, which you can use to troubleshoot and resolve prior to migration.
2	The **Download log** provides a list of failed rules to review and troubleshoot.

Review

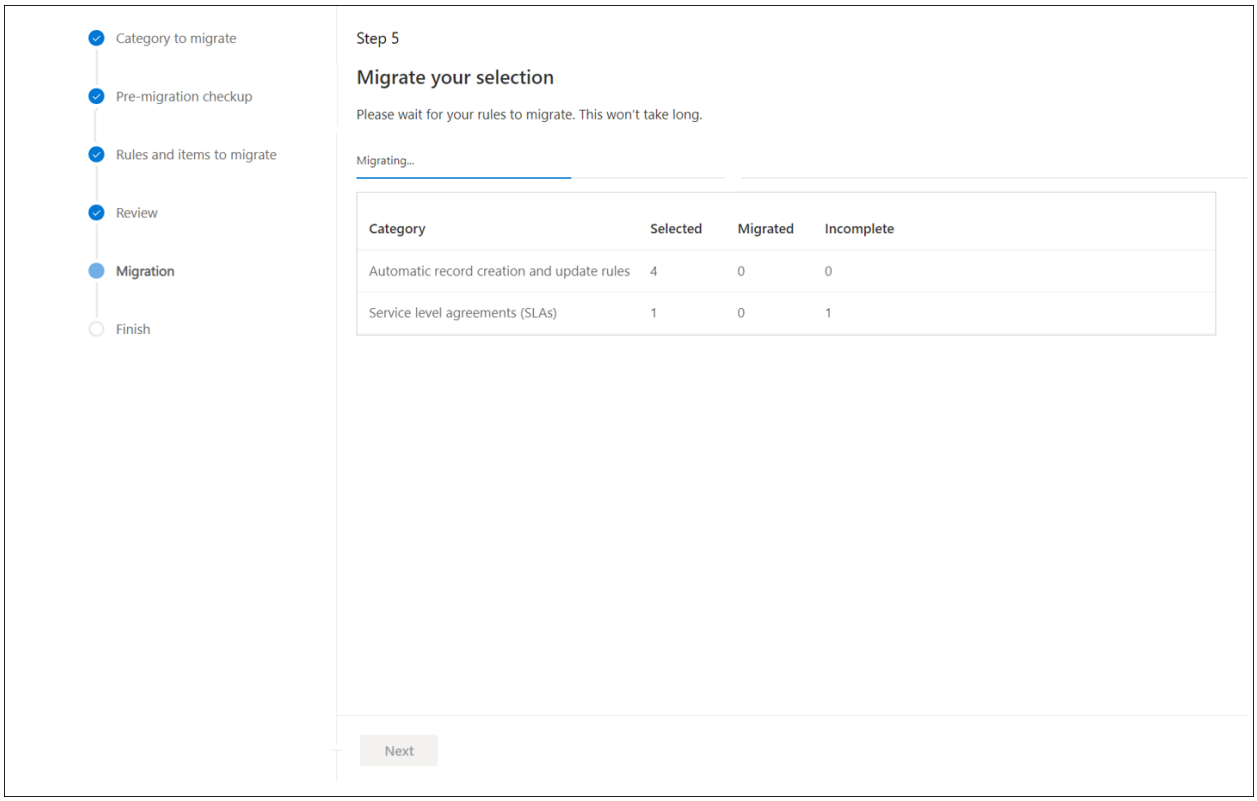
When you have selected the automatic record creation rules and SLA items, a list is displayed for your review.



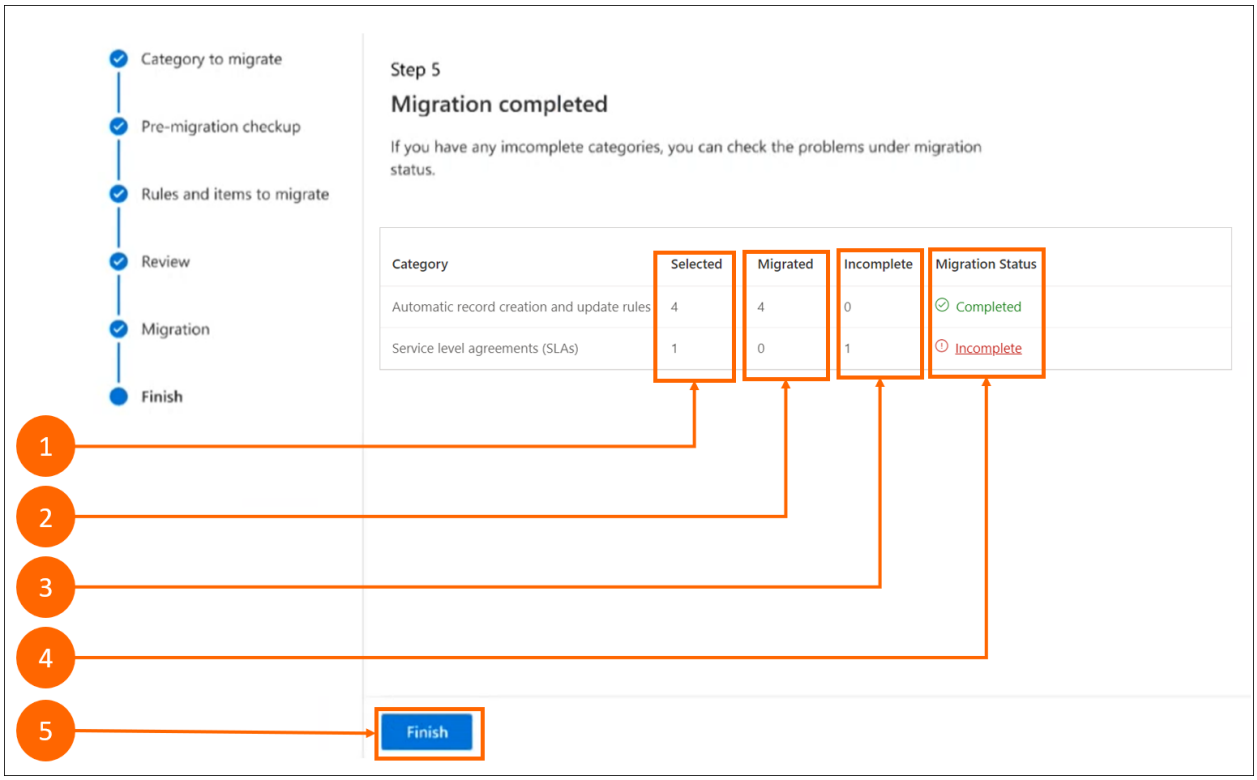
Label	Description
1	View a list of all the rules that you've selected for migration.
2	Select **Back** to return to the previous step to make additional changes.
3	Select **Start migration** to begin the migration.

Migration

After you begin your migration, the details are displayed on the page.



The migration details are displayed after the migration is complete.

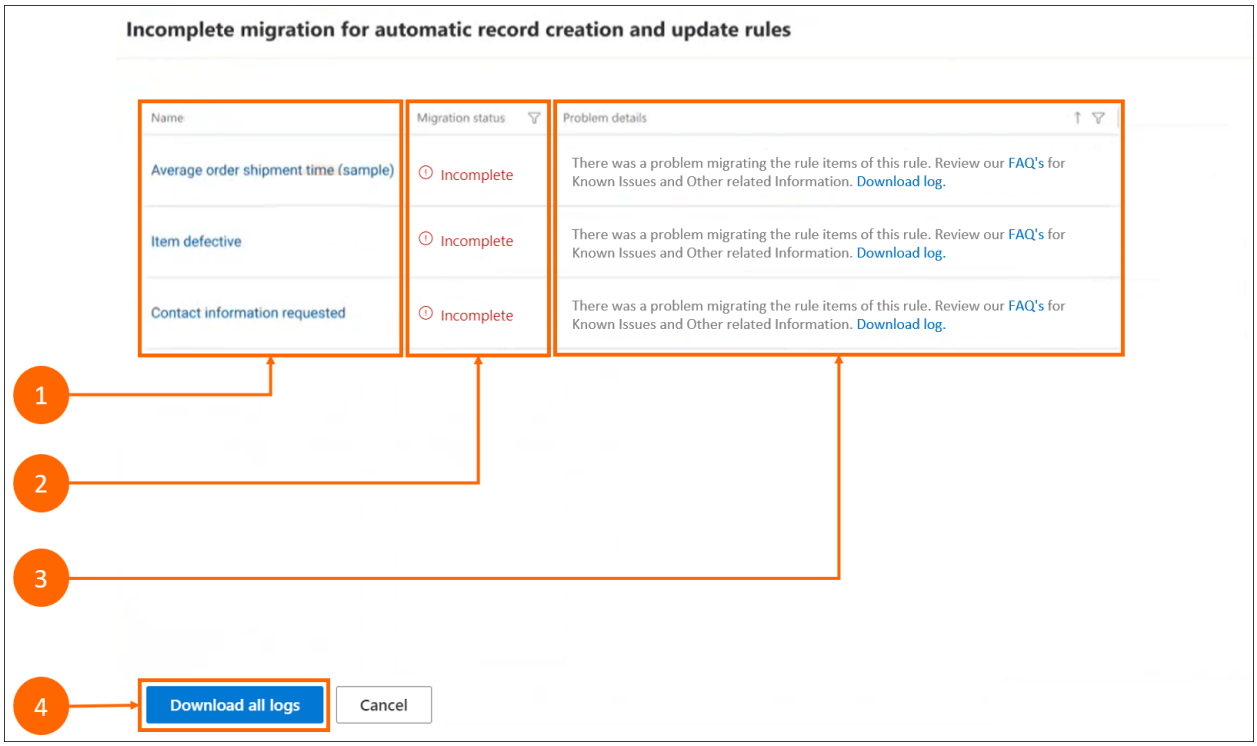


Label	Description
1	**Selected**: Displays the total number of rules that were selected for the current migration run.
2	**Migrated**: Displays the total number of rules that successfully completed migration.

Label	Description
3	**Incomplete**: Displays the total number of rules that encountered errors and didn't successfully complete migration.
4	**Migration Status**: Displays either a green check mark, which represents rules successfully migrated, or a red exclamation mark, which represents some or all rules did not successfully complete migration.
5	**Finish**: Completes the migration process when finished.

Incomplete migration details

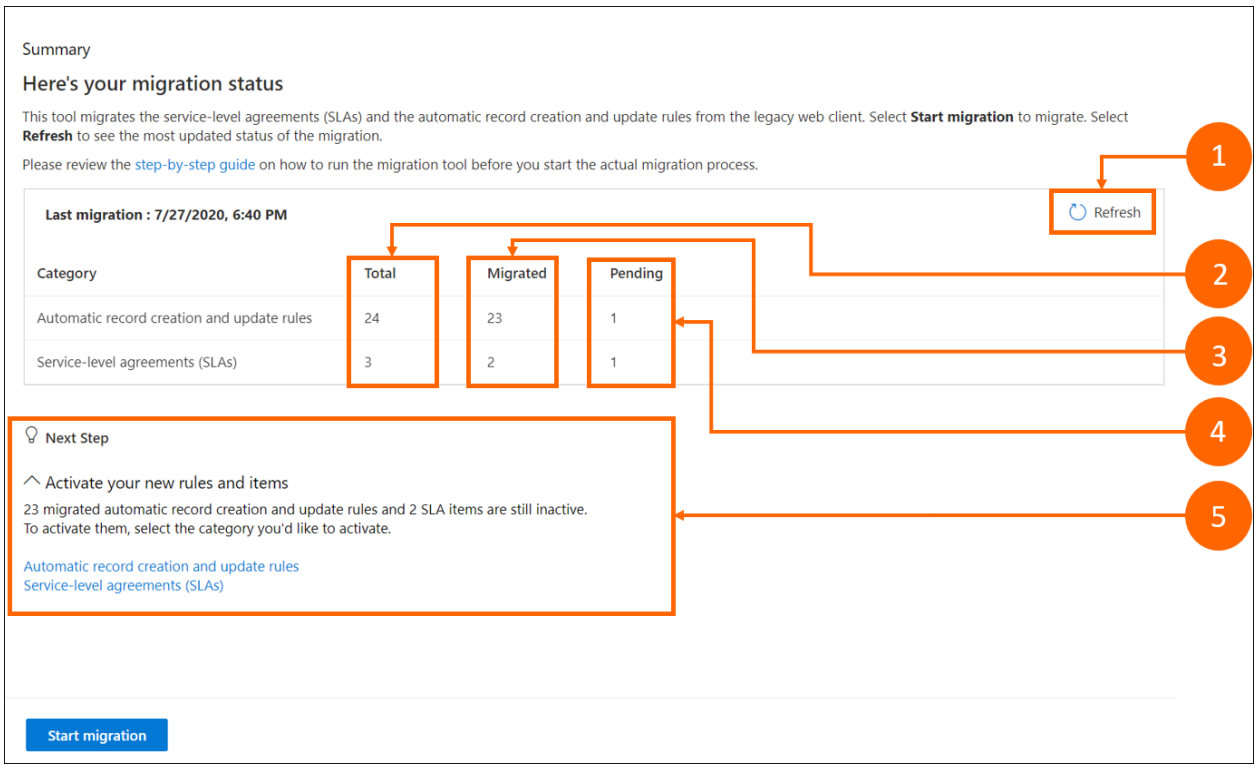
To view ARC or SLA rules that did not successfully complete migration, you can select **Incomplete** in the **Migration status** section.



Label	Description
1	**Name**: Displays each individual rule that failed.
2	**Migration status**: Displays the status as incomplete.
3	**Problem details**: Displays why the rule failed and has a **Download log** option that provides more details.
4	**Download all logs**: Let you download the logs of the rules that you can use for reviewing and troubleshooting.

Finish

When you've completed your first run and selected **Finish**, a migration **Summary** page is displayed.

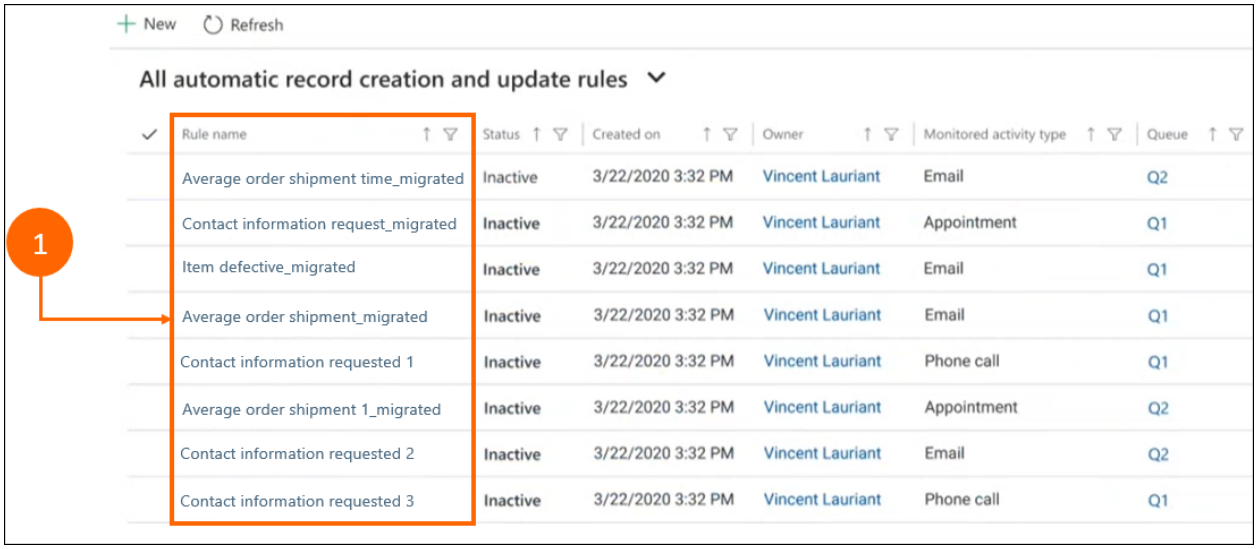


Label	Description
1	**Refresh**: Lets you view your updated migration status.
2	**Total**: Displays the number of legacy rules present overall.
3	**Migrated**: Displays the number of rules you have completely migrated to date.
4	**Pending**: Displays the number of rules you have pending migration (includes failed rules, partially/incomplete migrated rules, and rules that have not been attempted).
5	**Next Step**: Provides links to all the automatic record creation rules and SLA items that you can review and choose to activate them.

You can also refer to the migration playbook which includes all the information you need to work on the migration. More information: Dynamics 365 SLA and ARC Migration Playbook.

Review and activate migrated rules in Customer Service Hub

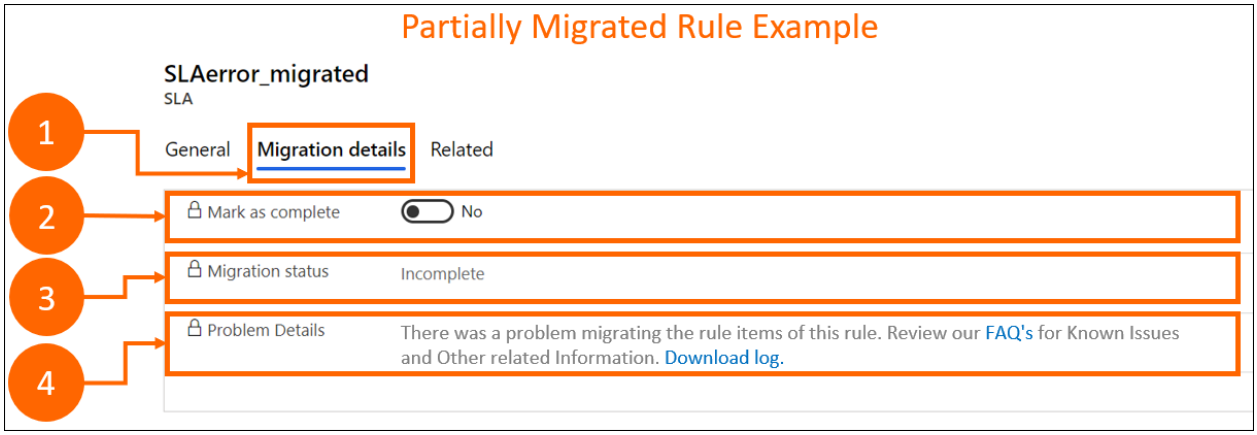
You can select the links on the migration summary page to view the automatic record creation rules or SLA items in Customer Service Hub. On the respective pages that appear, you can review and activate the migrated rules or items.



Label	Description
1	**Rule name**: Displays migrated rules with an underscore (_) to make it easier to identify the migrated rules. For example: **_migrated**.

Take action on partially migrated rules

Select a rule with the **_migrated** suffix to view its details. On the **Migration details** tab, you can review the problem details and set the **Mark as complete** toggle to Yes after resolving the migration issue.

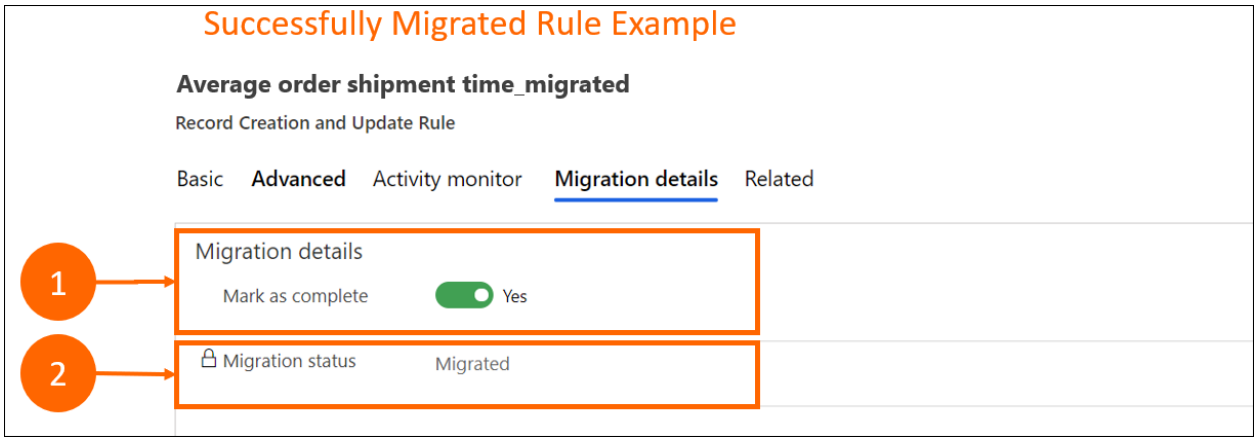


Label	Description
1	The **Migration details** tab.
2	**Mark as complete**: If set to yes, the migration status changes to **Migrated**. **Note**:

Label	Description
	• When the toggle is **Yes**, the rule won't be picked up in subsequent migrations. • If you don't take any action on an incomplete rule, the rule continues to be picked up in subsequent migrations. Also, the rule will be replaced when it is selected to migrate again.
3	**Migration status**: Displays the status of the rule as either **Migrated** or **Incomplete**.
4	**Problem Details**: Provides high-level detail on any errors encountered for the rule during migration.

View successfully migrated rules

A successfully migrated rule's migration status is set to migrated by default.



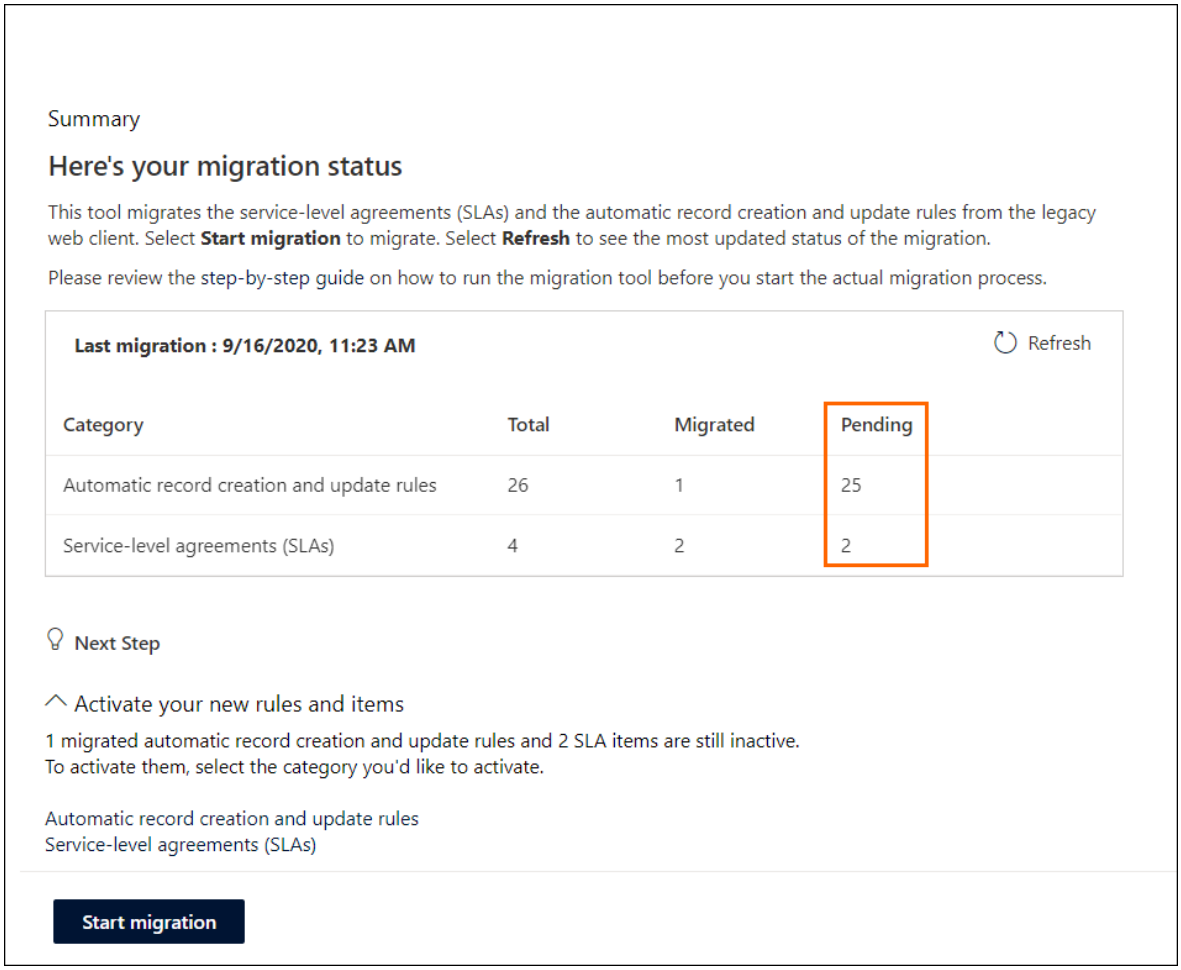
Label	Description
1	**Mark as complete**: Toggled to **Yes** by default.
2	**Migration status**: Displays the status of the rule as either **Migrated** or **Incomplete**.

Rerun the migration tool

If you have many rules and items to migrate and want to perform the migration in batches or want to attempt to migrate the unsuccessfully migrated rules and items again, you can rerun the migration tool. If you need to migrate a successfully migrated rule or item again, make sure you delete the migrated rule in Customer Service Hub, and then run the migration process.

1. Select **ARC & SLA Migration tool** in the left pane in **Service Management**. The **Summary** page displays the status of the previous migration. In the **Pending**

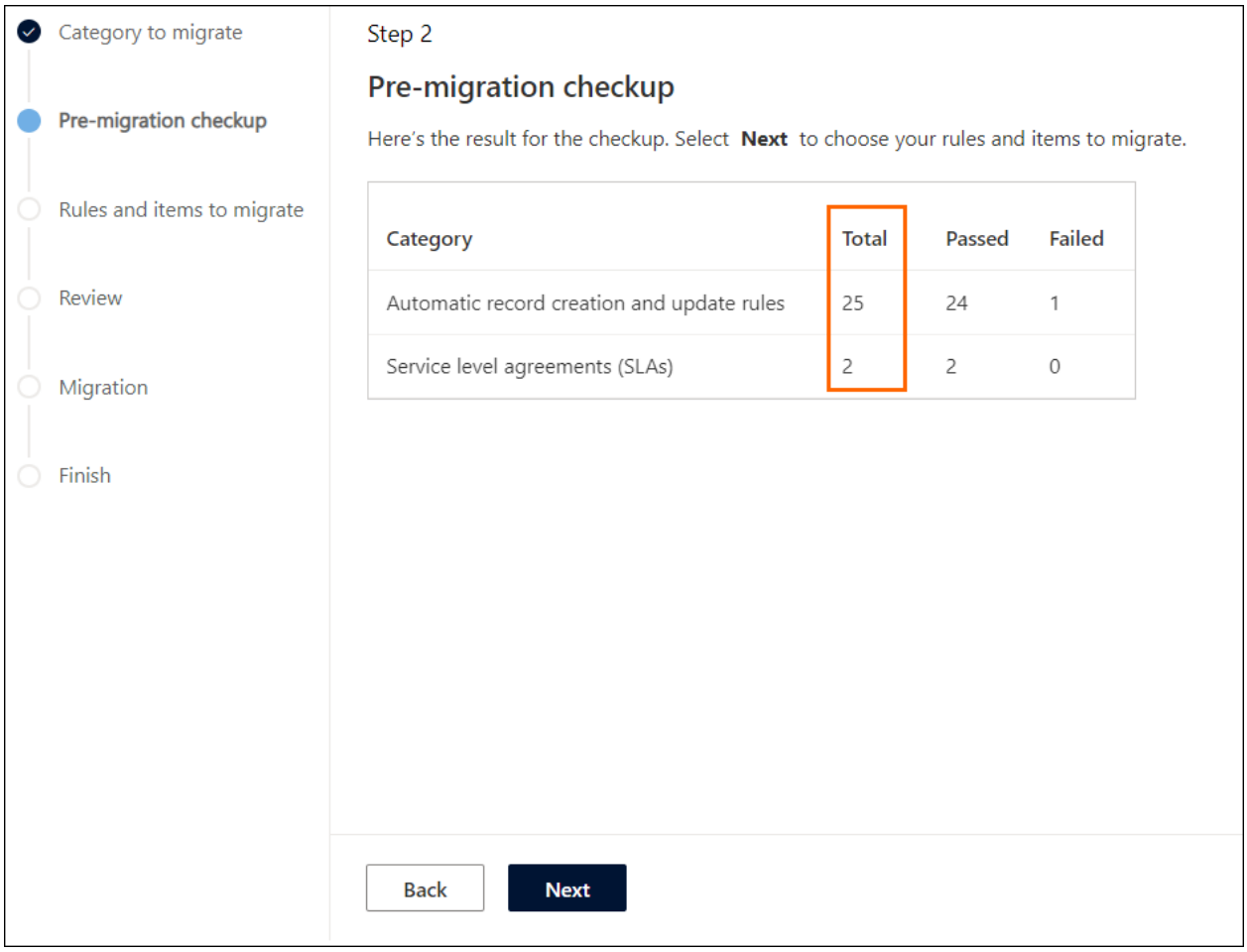
column, the number indicates the rules and items that are pending migration. These include failed rules, partially or incomplete migrated rules, and rules that have not been attempted.



2. Select **Start migration**, and perform the steps to run the migration of the rules and items again.

The steps to rerun the migration are same as when you run the migration for the first time. More information: Migrate the automatic record creation rules and SLA items

In the **Premigration checkup** state, the tool reviews only those rules that were previously not migrated, partially migrated, or failed the migration. On this page, the **Total** column lists the number of rules that are available for migration.



See also

Migration tool FAQs
Automatically create or update records in Customer Service Hub
Define service-level agreements
Important changes (deprecations) coming

Strategy for migrating from contracts to entitlements

Article • 07/07/2021

This document contains information about the settings that admins should manage when migrating contract records to entitlements. This migration support information will help customers prepare for the deprecation of the following:

- Contracts
- Contract line items
- Contract templates

Plan the migration

The process of migrating contracts to entitlements is as follows:

1. **Contract template to entitlement template mapping:** For records that are based on contract templates, migrate them to the entitlement templates.
2. **Contracts to entitlements:** Migrate the contract lines to entitlements by creating individual entitlements.
3. **Runtime tasks:** Run scripts to perform the migration.

Mapping: Contract templates to entitlement templates

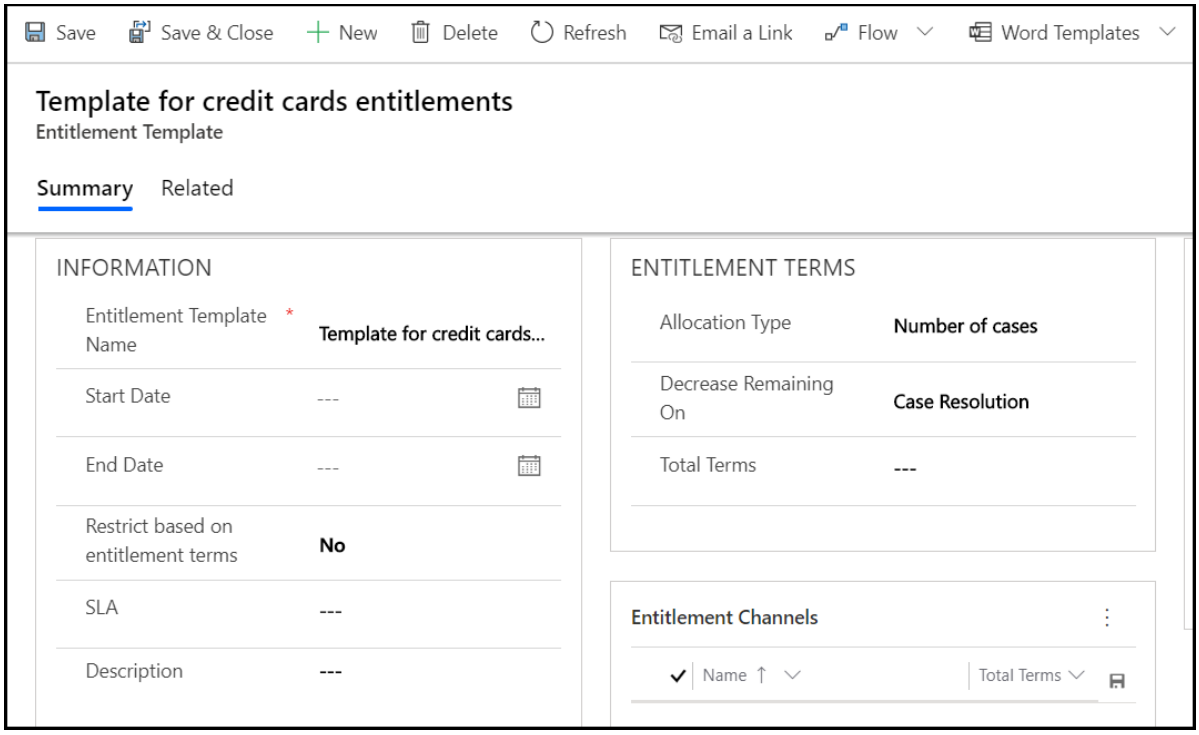
For feature parity, perform the tasks mentioned in the following sections to map the contract templates to the entitlement templates.

Allotment type

The allotment type based on coverage dates in the contracts template, which allows to create any number of cases between the start date and end date of a contract, isn't available in the entitlements template. To enable the same functionality, in the entitlement template, set the value for **Restrict based on entitlements terms** to **No**.

A screenshot of the allotment type in the contract template is as follows.

A screenshot of the entitlement template is as follows.



After an entitlement is created from the entitlement template, add custom code to copy the custom fields added on entitlement for parity with contract lines.

> **Note**
>
> The calendar option in the contracts template is not available in the entitlements template.

Benefits in entitlement

- Created cases will now display warning notices when they exceed the allocated terms.
- Customer usage can be monitored with the option to set and apply restrictions in the future.

Custom fields

Create custom fields in entitlement templates to migrate data from the fields in the contract template that aren't available in the entitlement template. Perform the following steps to switch from the contract template and map to the entitlement template:

1. Create custom fields with attributes on the entitlement template. For more information, see Create and edit fields (attributes).
2. Place the created fields on the form as per your business needs. For more information, see Add a field to a form.

Mapping: Contracts to entitlements

If you're currently using contracts, you can map to entitlements by following these steps:

1. Create a separate entitlement for each contract line.
2. Create custom attributes on the entitlement for missing contract lines attributes.
3. After an entitlement is created from the entitlement template, add custom code to copy the custom fields added on the entitlement for parity with contract lines.

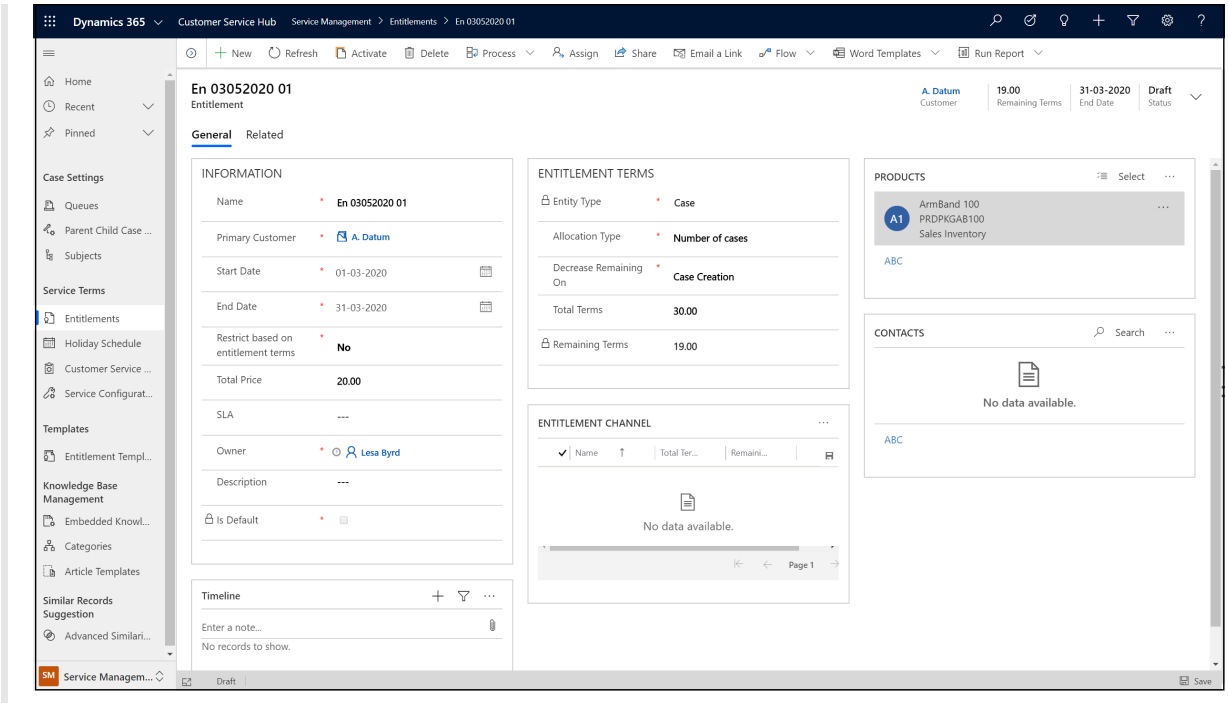
Things to consider

This section provides information on the functionalities that are different between contracts and entitlements and need to be considered in the migration process.

Single product contract

If you've a contract tied to a single product, follow these steps:

1. Create an entitlement.
2. Add only one product in the **PRODUCTS** grid.



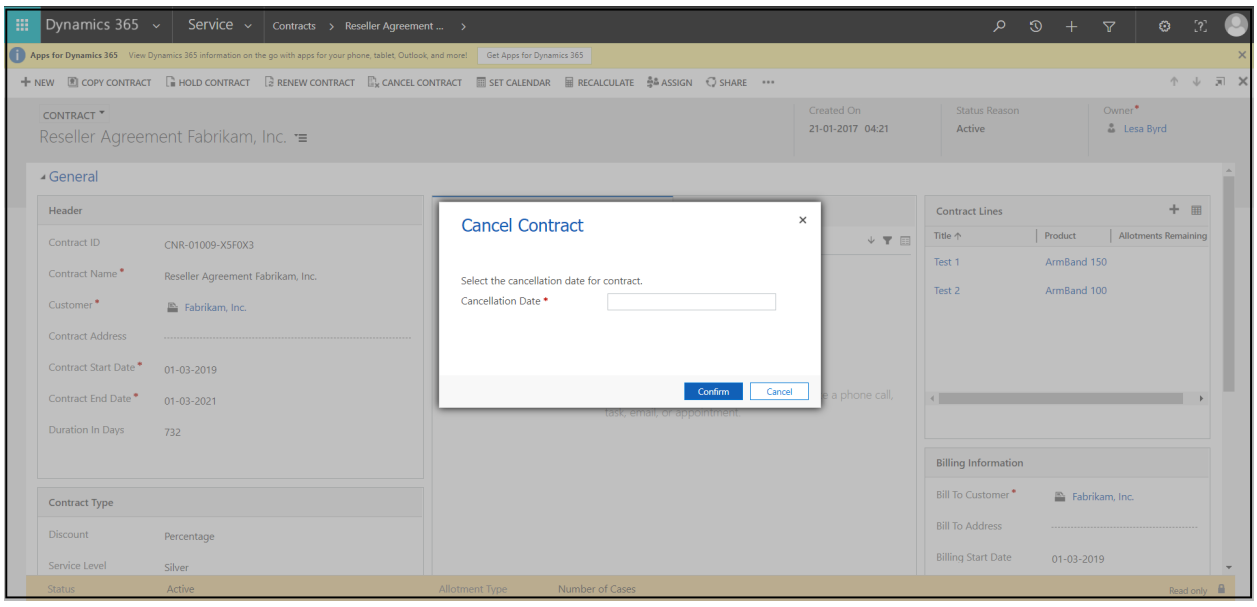
> **Note**
>
> The concept of grouping contract lines for a contract isn't available in entitlements. You need to create separate entitlements for every contract line.

Contract and entitlement cancellation

A contract or entitlement can be canceled using the following steps:

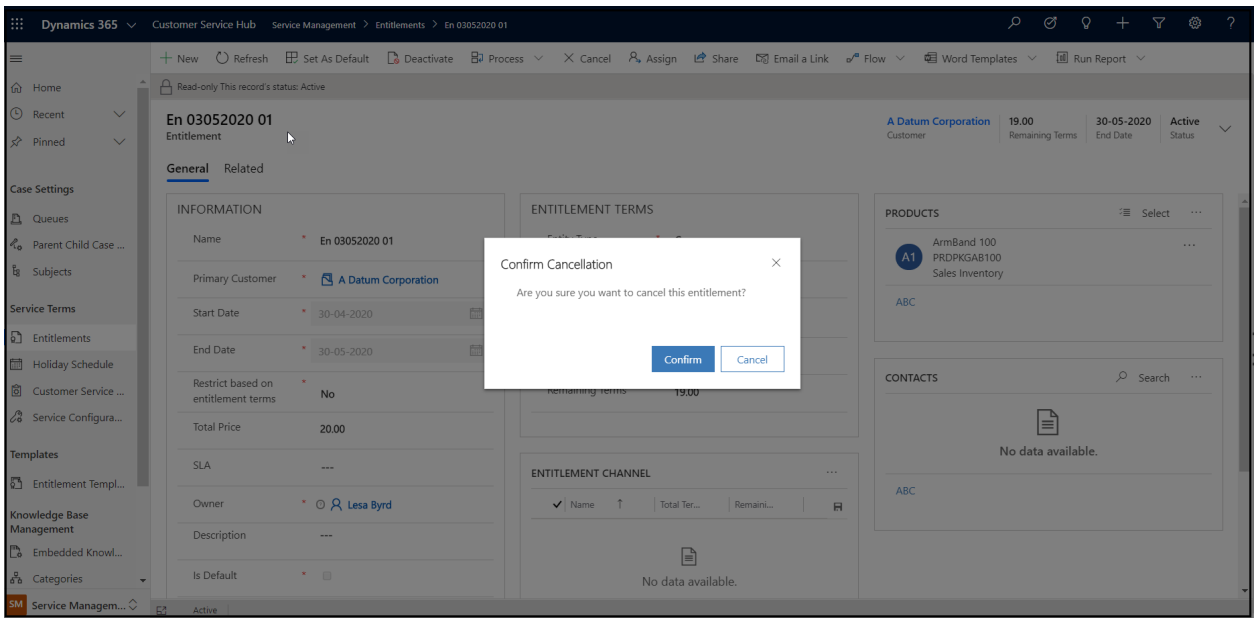
Cancel a contract

Contracts can be canceled immediately or in the future by selecting a date.



Cancel an entitlement

An entitlement can be canceled only immediately; you can't set a date to cancel it in the future.



Billing unit in contracts

Billing unit isn't available in entitlements. To achieve this capability in entitlements, use custom logic.

For simple rollups, use rollup fields. For more information, see rollup fields.

Commands in contracts

The following commands have been deprecated in entitlements:

- **Copy Contract:** To clone the contract.
- **Recalculate:** To recalculate the billing rollup.
- **Hold Contract:** To hold the contract.
- **Release Hold:** To release the on-hold contract.

The following commands are available in entitlements:

- **Renew:** To renew the expired entitlement.
- **Cancel:** To cancel the active entitlement.

State mapping

- The invoiced state in a contract can be mapped to the waiting state in the entitlement.
- The draft, active, canceled, and expired states are the same for both contracts and entitlements.
- The on-hold state isn't available in entitlements.

Runtime scripts for migrating contracts

After making sure that all aspects of feature parity for records in contracts are available in entitlements, perform the following steps to migrate from contracts to entitlements:

1. Move the contract and contract lines to entitlements using update scripts or an import tool such as Microsoft Excel.
2. Create and run update scripts to update entitlements on a case instead of contracts.

For business requirements, if a resolved case needs to be updated, perform the following steps:

1. Activate the case.
2. Update the entitlement lookup.
3. Resolve the case.

> **Important**
>
> In contracts and contract lines, the contract lines can be associated with a product that is different from the one listed in a case. However, in entitlements, the product listed in a case should match the product listed in the entitlement.
>
> **Example**: The contract lines associated with the product Armband 100 can be associated in the case list that is linked to another product, Armband 150. However, in entitlements, an error will occur when you link an entitlement associated with a product, Armband 100, with a case linked to Armband 150.

See also

Important changes (deprecations) coming
SDK code samples in basic update

Introduction to migration of legacy Service scheduling data

Article • 11/30/2021

Using the new scheduling experience in Customer Service Hub, you can schedule all your resources optimally and efficiently to plan service activities for your customers. You can now migrate your data to the new scheduling experience using the data migration wizard in the Customer Service Hub app.

To learn more, see Understand the new scheduling experience.

Consider the following scenarios before you begin migration:

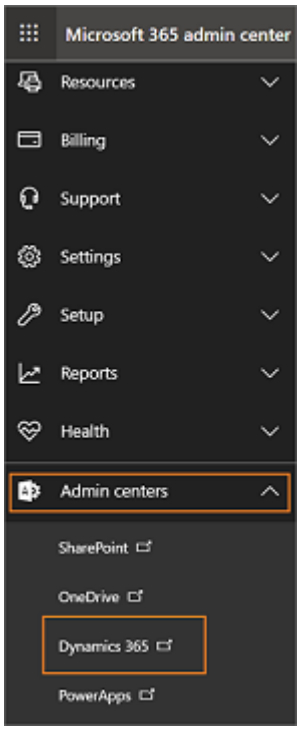
- If you haven't been using the legacy scheduling experience and you are setting it up for the first time in the Customer Service Hub app, see Set up the new scheduling experience.

  > **Note**
  >
  > As an admin, you should configure all your entity records in the new experience manually from the user interface. You must follow the order as given in the **Scheduling scenario** while configuring entity records in the new scheduling experience.

- If you've been using the legacy scheduling experience and plan to migrate to the new scheduling experience in the Customer Service Hub app, use the migration solution. The new migration package lets you migrate scheduling entity records. To learn more, see Migrate entity records and Install Scheduling solution.

Install Scheduling solution

1. Go to Microsoft 365 Admin center.
2. Select **... Show all** > **Admin centers** > **Dynamics 365**. Dynamics 365 opens in a new tab.



3. In the **Dynamics 365 Administration Center**, under the **Instances** tab, select an instance type from the drop-down.
4. Select the edit icon next to solutions. The **Manage your solutions** page appears.
5. In the **Manage your solutions** page, select **Service Scheduling Migration**. The status column shows **Not installed**.
6. Select the install icon next on the **Service Scheduling Migration** card. The **Terms of service** page appears.
7. In the **Terms of service** page, read the terms and conditions and then select **Install**. The installation may take few minutes.

After successful installation, you can access scheduling in the Customer Service Hub sitemap.

See also

Plan your migration

Migrate entity records

Plan your migration

Article • 01/29/2022

This topic explains the considerations and best practices that you need to be aware before starting the migration.

Considerations for migration

The following conditions need to be considered to perform migration.

- **Role privileges:** To perform the migration, you must have administrator or system customizer roles. The list of privileges that are required if you want to assign to any other roles are as follows:
  - msdyn_ursmigrationlogs
  - msdyn_ursmigrationinfo
  - msdyn_ursmigratedentitiesinfo

- **Order of migration:** Migration of the entity records follow an order. That is, when the migration of one entity record completes, then the next entity will be processed for migration.

  The order of the migration is as stated:

  1. Site
  2. User
  3. Facility/Equipment
  4. Team
  5. Resource Group
  6. Service
  7. Service Activity

- **Migration start date and end date:** Start date and end date helps you to migrate the service activities that are scheduled to happen between the date range you've specified (only the start date is inclusive).

  Scenario example: You've specified the migration end date field as **07/22/2019**.

Migration End date	Activity scheduled date	Activity end date	Entity record migration	Reason

Migration End date	Activity scheduled date	Activity end date	Entity record migration	Reason
07/22/2019	07/23/2019	07/23/2019	No	The service activity won't be migrated as the scheduled date is beyond the end date.
07/22/2019	07/22/2019 at 2300 hours	07/23/2019 at 0500 hours	No	The service activity won't be migrated as the scheduled activity ends at a date later than the specified migration end date.
07/22/2019	07/22/2019 at 2359 hours	07/22/2019 at 0500 hours	Yes	The service activity will be migrated as the activity ends before the specified migration end date.

- **Recommendation:** For best migration experience, we recommend that you don't use Service Scheduling until the migration is completed.
- **Ignore entity records:** If you don't want to migrate certain entity records from legacy Service Scheduling to Unified Interface based Service Scheduling, then you need to add **Migration Status** attribute and set the value as **Ignore**. The records that are marked as **Ignore** won't be migrated by the tool. The field displays the following statuses:

Status	Description
Failed	The entity records that failed in the migration process.
Ignore	The entity records that are ignored in the migration process.
In Progress	The entity records that are in progress in the migration process.
Migrated	The entity records that are migrated in the migration process.
Not Started	The entity records that are not yet started for migration.

- **Failed Migration for certain records:** When the migration of an entity record fails, then you can retry migration. For the retry scenario, the number of records that are displayed in the screen are the records that didn't migrate in the first run of the migration and also, those entity records that were created after the first run.
- **New entity record:** If you create any records after you start the migration, the new entity records might not be reflected in the migration summary.

- **Custom plugins and workflows:** After the migration, if you've custom plugins and workflows, examine them for compatibility with the new scheduling experience.
- **Updating records during migration:** After you've migrated an entity record, if you update the record in the legacy service scheduling, the difference of update can't be migrated using the tool. You must manually update the changes in the new service scheduling experience.

Ignore entity records during migration

To ignore an entity record during migration, perform the following steps.

1. Sign in to Dynamics 365.
2. Go to **Settings** > **Customizations** > **Customize the System**.
3. Expand the entity you want to ignore, and select **Forms**. For example: **Facility/Equipment**.
4. Select the section to which you want to add the field.
5. Drag the **Migration Status** field from the **Field Explorer** pane and drop the field in the section where you want to add.
6. Select **Save**.
7. Select **Publish** to publish the customizations.

See also

Introduction to migration of entity records

Migrate entity records

Migrate data from legacy Service scheduling using migration tool

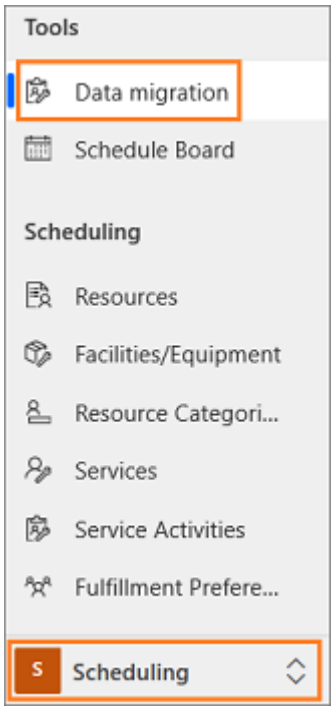
Article • 11/30/2021

Follow these steps to migrate entity records from legacy scheduling experience to the new scheduling experience.

1. Sign in to the Customer Service Hub app with Administrator or System Customizer role privileges.

2. Select **Scheduling** from **Change area**.

3. Select **Data migration** under **Tools**. The **Migrate to Service scheduling on Unified Interface** page displays the **Last run status**. If you've never run the tool, then the **Date** and **Status** field will be blank.



4. Review the details and select **Next** in the **Migrate to Service scheduling on Unified Interface** page. The **Step 1/3: Configuration data** page appears that displays the name of the entity records and the total number of records that will be migrated.

5. Specify the following in the **Step 2/3: Service Activities** page and select **Migrate**.

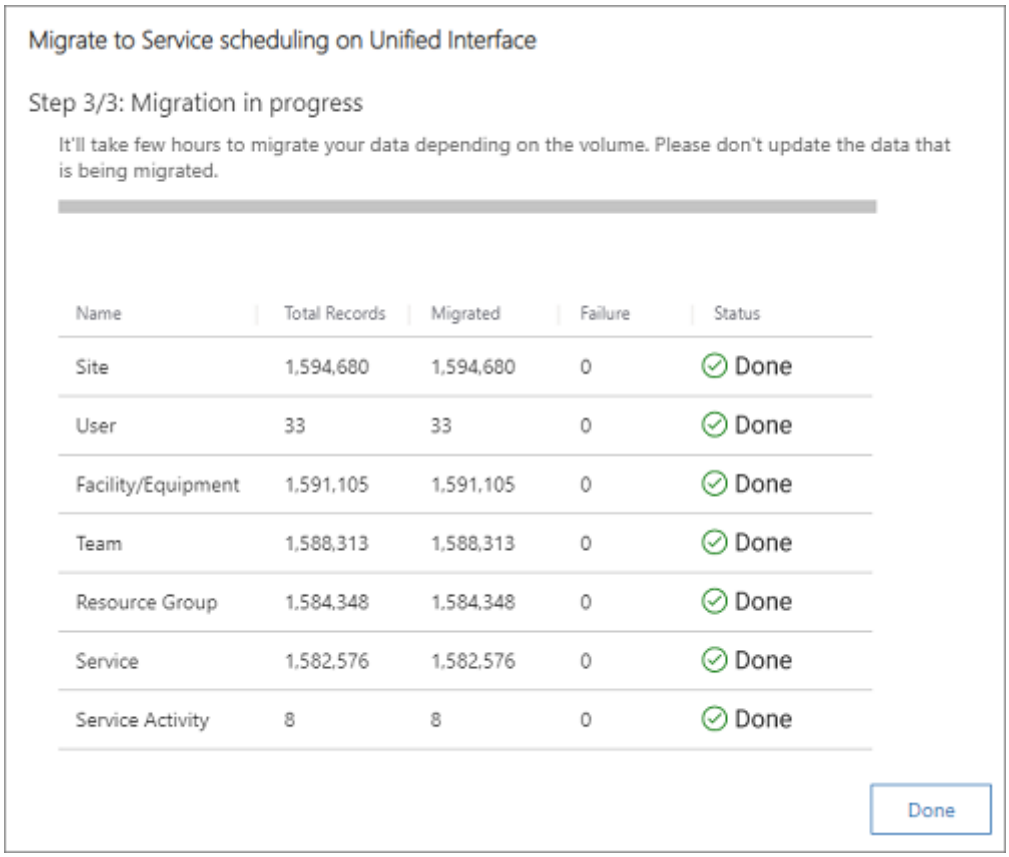
Field	Description	Value
Migrate Service Activities	Set the toggle to **On** to migrate the service activities.	On

Field	Description	Value
Start date	Select a start date from the date picker.	6/20/2019. **Note:** This is an example value.
End date	Select a end date from the date picker.	9/23/2019. **Note:** This is an example value.

The tool considers all the Service activities that are scheduled to start and be completed within the date range.

> **Note**
>
> - The migration tool doesn't consider the records whose status is marked as Ignore. To learn more, see **Understand migration status**.
> - If you create any records after you start the migration, the new entity records will not be fetched and migrated.

6. Review the information in the confirmation dialog and select **Migrate**. Once you migrate, the action cannot be undone.
7. Review the status of the migration. If the migration is successful, select **Done**, and the migration status page is displayed.



> **Note**
>
> After you've migrated an entity record, if you update the record in the legacy service scheduling, the difference of update can't be migrated using the tool. You must manually update the changes in the new service scheduling experience.

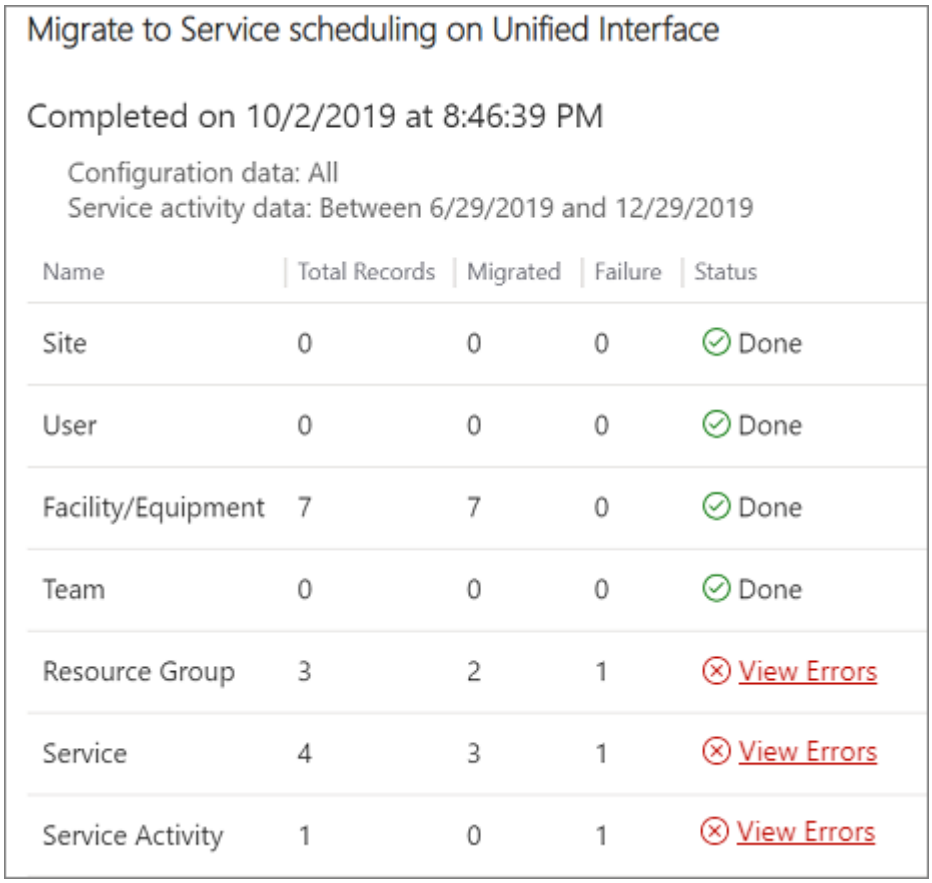
Understand migration summary and troubleshoot

The status column displays two types of migration statuses for the entity records:

- **Done:** When the migration of the entity records is completed successfully, the tool displays the status as Done.
- **View Errors:** When the migration of the entity records is failed, the tool displays the status as View Errors.

View errors

If the migration of one or more entity records has failed, the status column displays for which entity records the error has occurred.



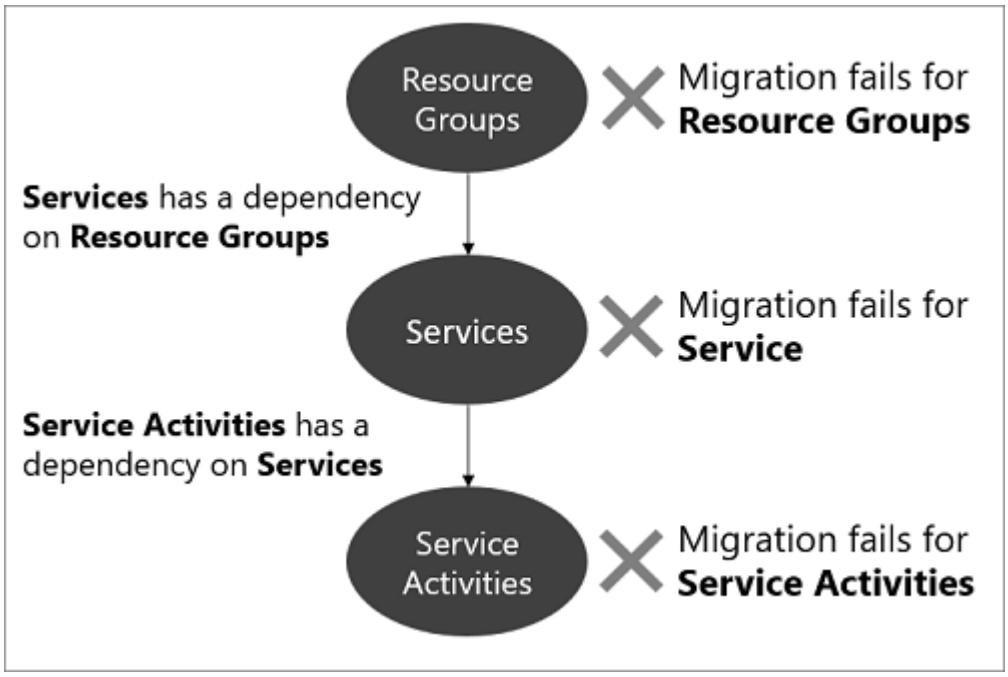
Select the **View Errors** in the status column to view the details in a new browser tab. The tool navigates to the associated entity view that shows the record name, status (which will be failed all the time), and migration failure reason.

For example, when you select the View Errors option against the **Service Activity**, a new browser tab opens, and the tool displays **Service Activities - Migration Status** page.

To learn more, see Troubleshoot using migration information.

Troubleshoot to resolve migration errors

One of the reasons for the failure of entity record migration is a dependency among the entity records. That is, a **Service Activity** entity record has a dependency on the **Service** entity record, which in turn has a dependency on the **Resource Group** entity record. If the migration of **Resource Group** fails, then migration of **Service** and **Service Activity** also fails.



> **Tip**
>
> Resolve the errors in the order in which the entity records are migrated. To learn about the order of migration, see **Considerations for migration**.

For example,

Henry Ross, a customer, has scheduled a service activity with Contoso Bike Center. To do this service activity, the **Bike technicians** resource group and **Bike overhaul** service are required.

See the matrix for the dependency.

Entity name	**Record name**
Resource Group	Bike technicians
Service	Bike overhaul
Service Activity	Henry Ross (customer)

The **Service Activity** for Henry Ross has a dependency on the **Service**, Bike overhaul and **Resource Group**, Bike technicians.

Let us take the preceding example to learn how to resolve the error.

1. Select **View Errors** against the **Service Activities** record in the **Data Migration Wizard** tab.

The **Service Activities - Migration Status** page opens in a new browser tab. You can view the migration error message for the **Henry Ross** customer stating service has failed due to the **Dependent ResourceGroup is not migrated**, which has the GUID as `3979D7DB-F5DA-E911-A81F-000D3A6D4947`.

2. Open a new browser window and go to `https://<dynamics org url>api/data/v9.0/services(<Guid>)`. For example, `https://<dynamics org url>api/data/v9.0/services(3979D7DB-F5DA-E911-A81F-000D3A6D4947)`.

   Now, you find the record name. In our case, it is **Bike technicians**, which is a **Resource Categories** entity in the new service scheduling experience.

3. Select **View Errors** against the **Resource Categories** record in the **Data Migration Wizard** tab.

   The **Resource Categories - Migration Status** page opens in a new browser tab. You can view the error the caused the Site entity record failure.

4. Resolve the error that caused the migration failure, and then you can go to the migration step, and select **Retry Migration** to start the migration for the failed entity records.

   > ⓘ **Note**
   >
   > In case of retry scenario, the migration tool shows the number of records that need to be migrated in that retry scenario of migration.

5. Review the migration status, if there are any errors, investigate in a similar way as explained in this example.

See also

Introduction to migration of entity records

Plan your migration

Omnichannel for Customer Service app deprecation and migration FAQ

Article • 06/28/2023

This article contains commonly asked questions about the deprecation of the Omnichannel for Customer Service app and migrating to Customer Service workspace.

Why is the Customer Service workspace app replacing Omnichannel for Customer Service?

Continued investment in two multisession apps that are at feature-level parity limits our ability to deliver new features for customers.

Is the omnichannel feature being deprecated?

No, omnichannel is a platform feature that's accessed through applications. One of those applications for agents, Omnichannel for Customer Service, has been planned for deprecation.

What does deprecation mean?

Deprecation means Microsoft plans to stop investing in a feature or app after the deprecation date. In this case, the Omnichannel for Customer Service app is deprecated as of April 1, 2023.

Is the Omnichannel for Customer Service app still supported now that it's deprecated?

Yes, support is available until June 2024.

Can I continue to use the Omnichannel for Customer Service app?

Yes, you can. Omnichannel for Customer Service continues to be supported until June 2024. More information: Enable the Omnichannel for Customer Service app and disable the Customer Service workspace app

What is the end-of-support date?

End of support for the Omnichannel for Customer Service app is planned for June 2024.

Since Omnichannel for Customer Service is no longer being invested in now that it's deprecated, what app should I use?

You can use the Customer Service workspace app, which has feature-level parity with the Omnichannel for Customer Service app.

Do I need a different license to access the Customer Service workspace app?

No, you don't need a different license. The Customer Service workspace app is available with your current licensing.

Will I lose functionality when I move from the Omnichannel for Customer Service app to the Customer Service workspace app?

No, the two applications are at feature parity.

How do I manage the Customer Service Workspace app?

You can manage Customer Service workspace in the Customer Service admin center app, which is also used to manage Omnichannel for Customer Service.

How do I move my Omnichannel for Customer Service app configurations to the Customer Service workspace app?

To migrate your Omnichannel for Customer Service app configuration to Customer Service workspace, follow the steps in the migration guide.

Migration tool FAQ

Article • 08/22/2023

FAQ on migration tool for automatic record creation rules and service level agreements (SLAs)

Who can access or run the migration tool?

Administrators and users with CSR manager roles can run the migration tool.

Are migrated rules automatically activated post-migration?

No. You must manually activate the migrated rules when migration is complete.

Can I still use my legacy rules after the deprecation deadline?

Yes, any active legacy rules after the deprecation deadline will still run until they're deactivated. However, supportability and the editing experience will stop after deprecation.

Can I activate a rule with an incomplete migration status?

No. A migrated rule can only be activated when **Mark as complete** is toggled to **Yes** (that's when the rule is considered successfully migrated).

> ⓘ **Note**
>
> Review the incomplete rule to resolve any issues before you toggle the **Mark as complete** to **Yes**, and then activate the rule.

Will the legacy rule be deactivated?

- **For ARC, yes.** When you activate a migrated ARC rule in Unified Interface, the corresponding legacy rule will be deactivated.
- **For SLA, no.** When you activate a migrated SLA rule in Unified Interface, the corresponding legacy rule remains active because they can coexist.

What does an "incomplete" status mean?

- If located in the **Summary** section, it means the overall migration process couldn't successfully complete the migration of all selected rules.
- If listed next to a rule, it means the rule has either failed or couldn't be fully migrated (meaning one or more items or conditions failed to migrate).

Where can I find a list of partially migrated rules that are tracked in the migration tool?

Rules that are partially identified or identified as "incompletely migrated" are tracked under **Pending** in the **Summary** section since they aren't considered fully migrated. Only rules that completed migration successfully are counted under **Migrated**.

Are custom forms or fields supported by the migration tool?

- **For ARC, yes.** The migration tool does support custom entities and custom fields, attributes, and configurations.
- **For SLA, no.** Custom entities, fields, attributes, and configurations aren't fully supported by the migration tool. Users would need to modify any existing customization flows, workflows, plugins, or any other custom code on the custom entities, fields, attributes, and configurations to complete the migration.

Do I need a separate license for Power Automate before running migration?

No. For more information on licensing guidelines, go to What are Microsoft Power Apps and Power Automate use rights for Dynamics 365 applications?

Some of my rules are incomplete or partially migrated. What should I do?

You can either fix the rule in the web client based on the problem details and rerun your migration, or fix the migrated rule directly in Unified Interface.

Can I rerun the migration tool for a specific migrated rule?

Yes, you can rerun the migration tool for a specific migrated rule based on the following:

- **For incomplete or failed migration rules:** Select the same rule when you rerun the migration tool. It automatically replaces the existing failed or incomplete rule with the newly migrated one.
- **For successfully migrated rules:** Delete the migrated rule in Unified Interface before rerunning the migration tool.

What happens to existing SLA records that are associated with legacy SLAs after the migration is complete?

1. If the legacy SLA is deactivated after migration: The timer will continue to run until the terminal state for such SLA records but the **Resolve** or **Pause** functionality won't work.

2. If the legacy SLA is still in **Active** state: Existing SLA records with legacy SLAs will continue to work as expected.

3. If you want to use SLAs created in the Unified Interface apps on existing records: You'll need to update the SLA field to Unified Interface SLA manually or write the plugin to update the records. For example, the plugin logic could be Modern Flow or Workflow.

For information about migrated rule or flows in modern ARC, go to FAQ about modern automatic record creation.

Known condition conversion issues

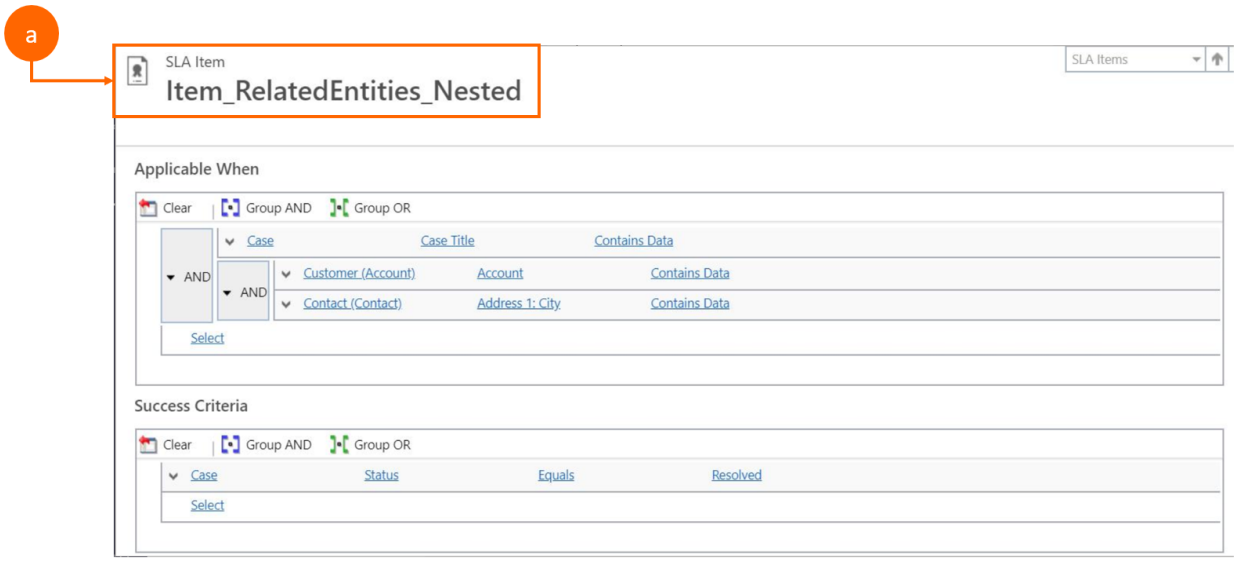
The following are key scenarios where rules or items won't successfully complete migration:

If my rule items or conditions have related entities inside a nested group clause (and/or), will they be migrated to Unified Interface?

No. We currently only support one level of the related entity hierarchy. For such rule items or conditions to successfully migrate, you need to remove any related entity in group clause before you migrate. If you don't take any action, the rule will fail during the **Premigration checkup** step, and if you then choose to continue with the migration, the rule will have an empty condition for the respective item.

Example: Premigration view

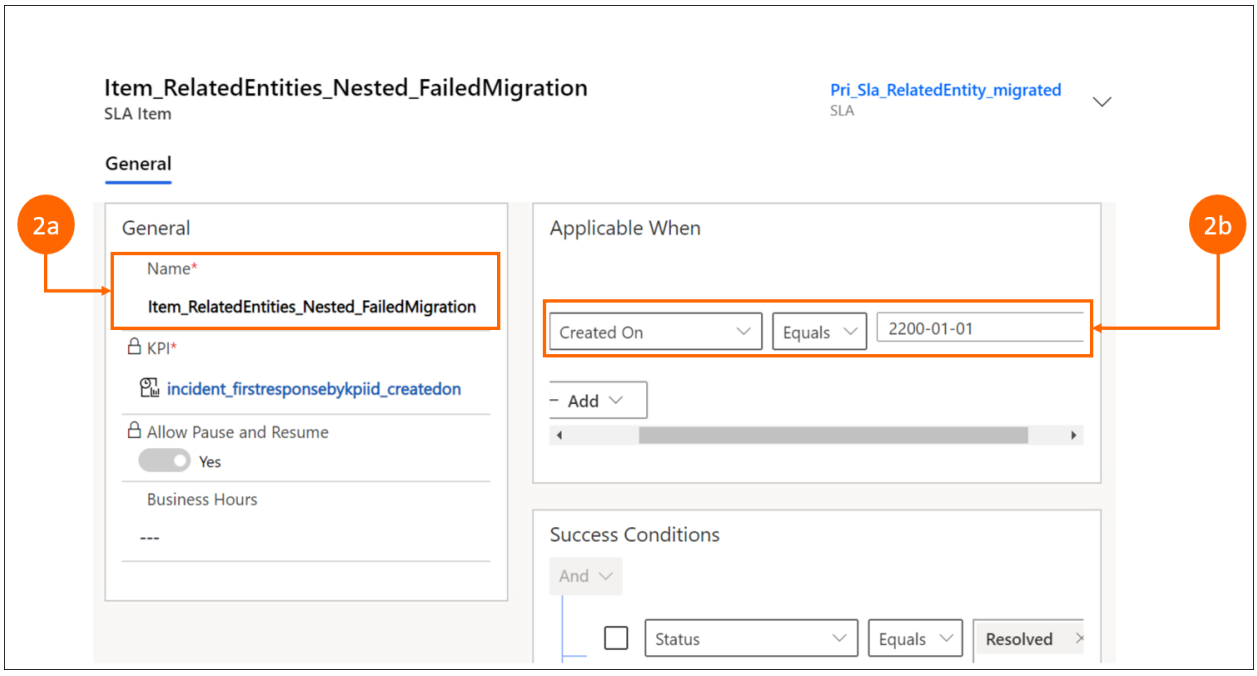
a. Premigration web client view.



Example: Post-migration Unified Interface view

2a. The migrated item title changes to **_FailedMigration** appended.

2b. The same standard placeholder, **Created On equals 2200-01-01**, is added to the condition.

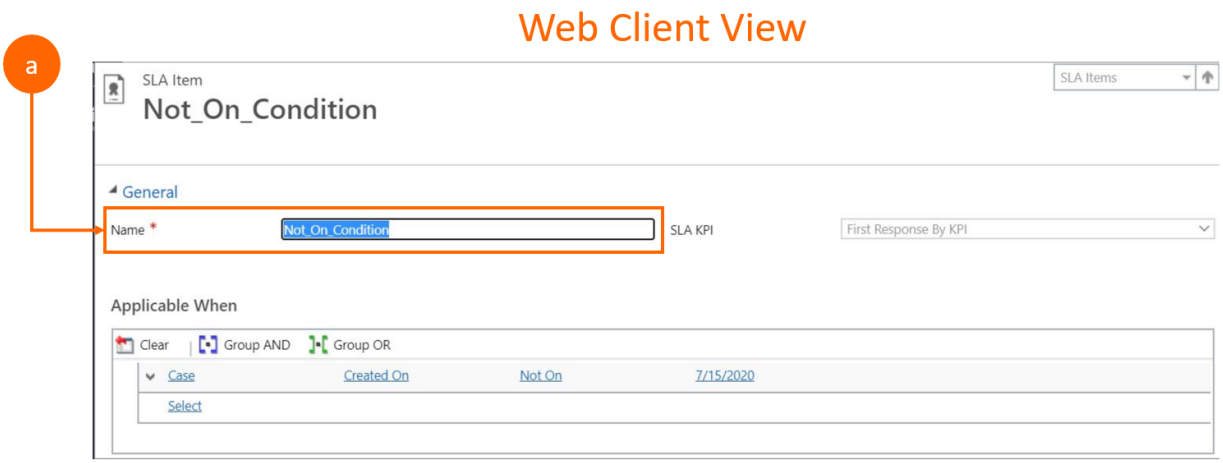


Why do my rule items or conditions with a DateType field that uses a "not on" operator fail during the premigration checkup and actual migration?

The **Not on** operator for the **Date** data type isn't supported in Unified Interface, and therefore isn't supported as part of migration. To fix this issue, you can change the legacy items or conditions from **{not-on selecteddate}** to **{selecteddate less than and selecteddate greater than}** in the web client before rerunning the migration tool for the respective rule.

Example: Premigration view

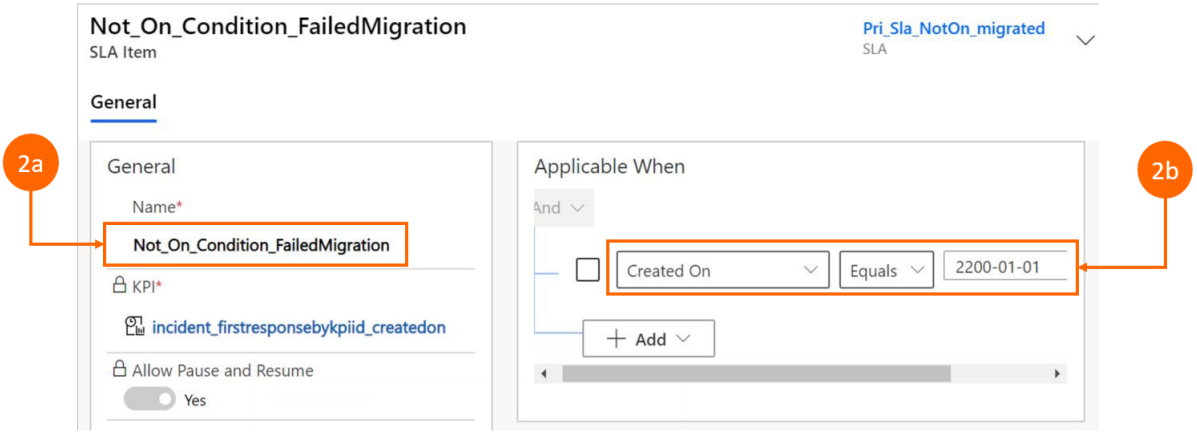
a. Premigration web client view.



Example: Post-migration Unified Interface view

2a. The migrated item title changes to **_FailedMigration** appended.

2b. The condition **Created On equals 2200-01-01** is added to the condition.



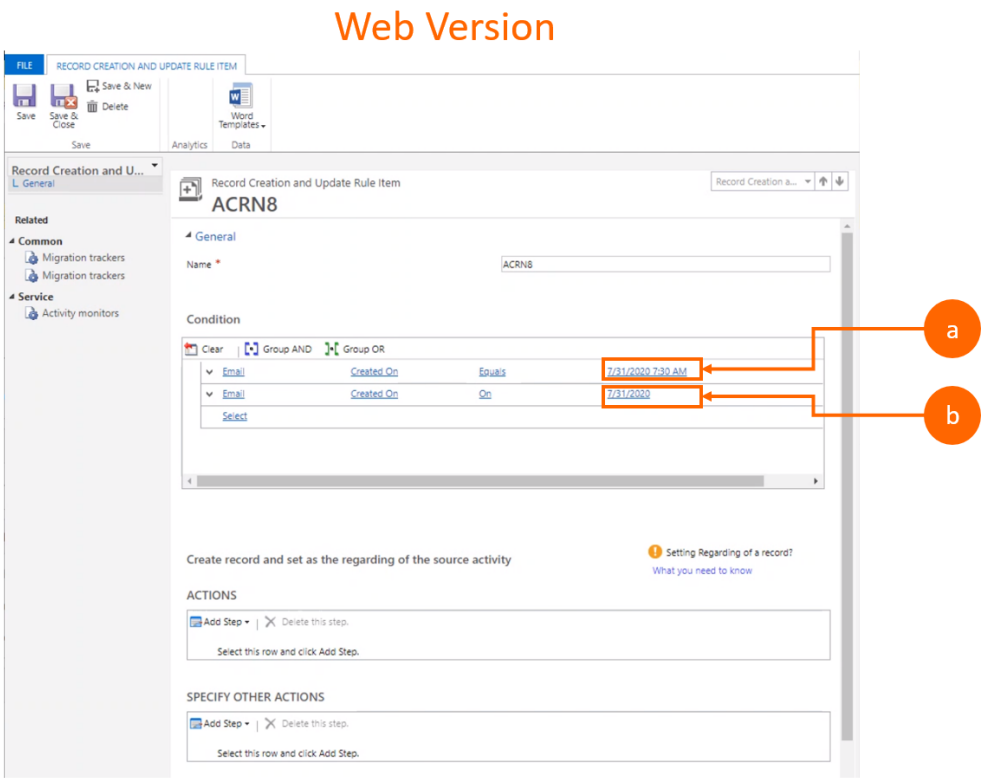
Why does the data in my DateTime field change during migration?

A separate time field doesn't exist in Unified Interface, so the DateTime field will change from a calendar control to text field. Input should be in a specific format as shown in the text box below:

Example: Premigration view

a. Premigration **Date and time** location.

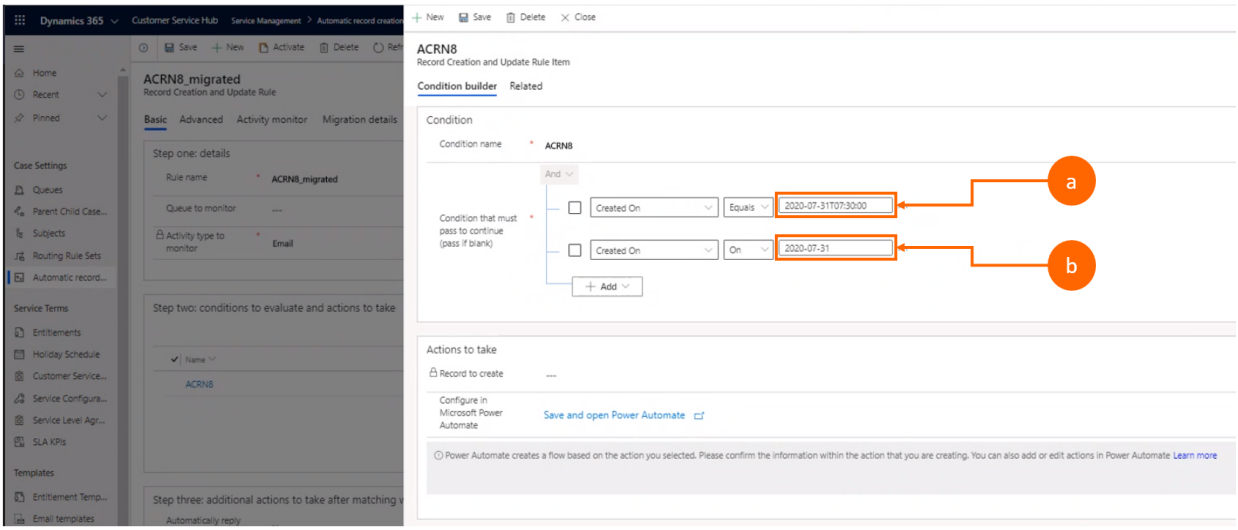
b. Premigration **Date only** location.



Example: Post-migration Unified Interface view

a. Post-migration **Date and time** location

b. Post-migration **Date only** location

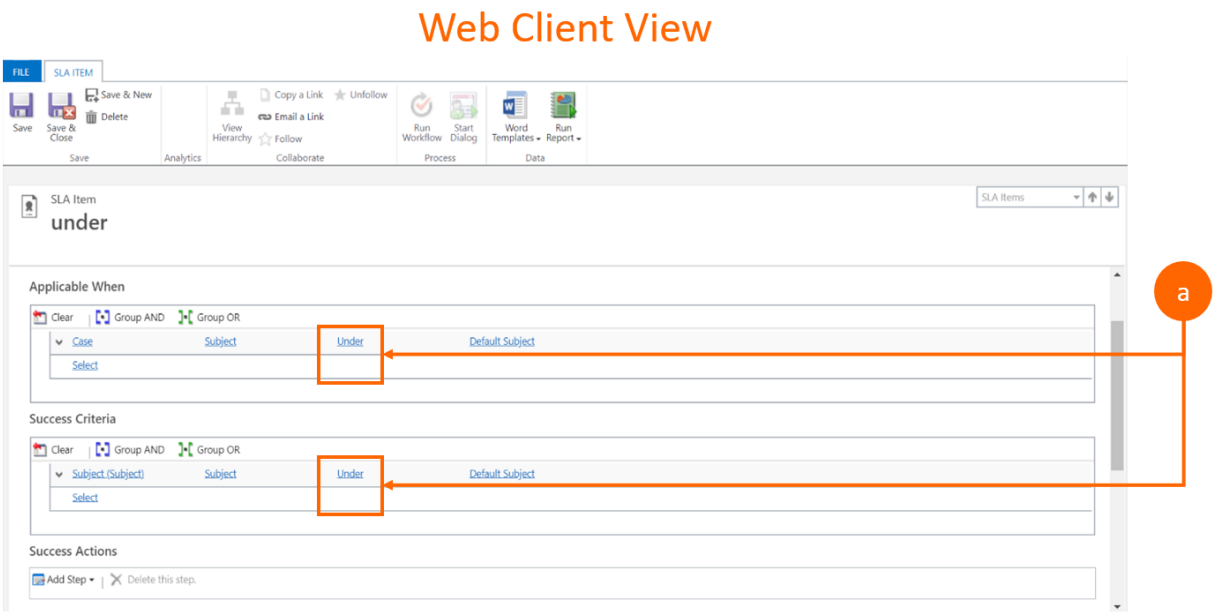


Why are some of my operator fields blank in Unified Interface after migration?**

For lookup data types, only the **equal / not equal, null /not null** operators are supported in Unified Interface and the migration tool. **Under** and **not-under** operators aren't supported in Unified Interface, and therefore aren't supported in the migration tool. Any conditions that have **under** or **not-under** operators are translated as **related entities** after migration and are shown as blank in Unified Interface after migration, and can't be edited.

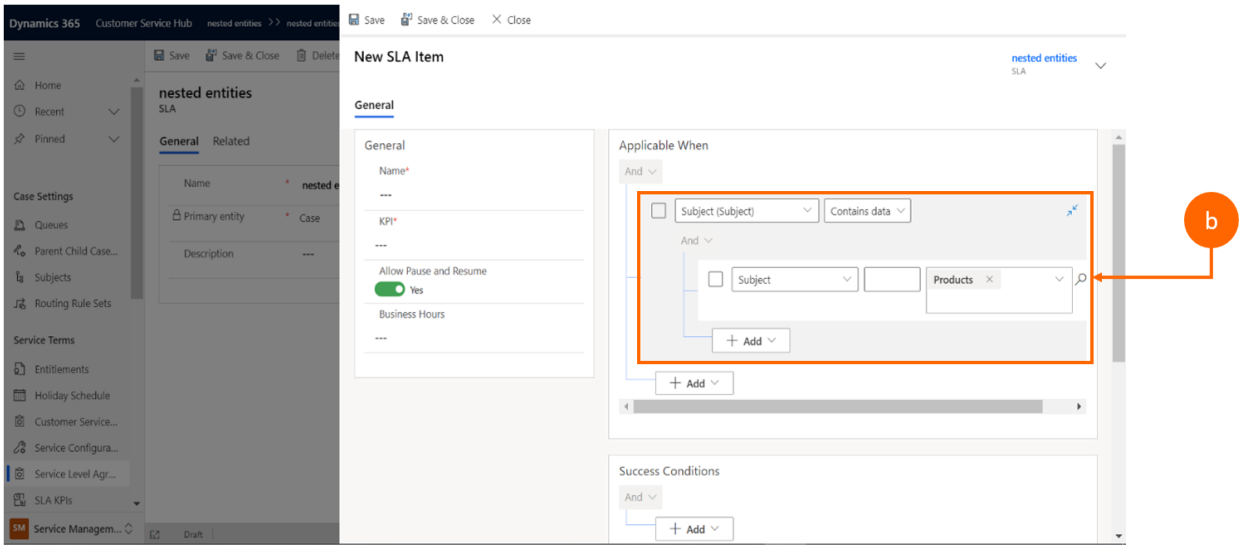
Example: Premigration view

a. Premigration web client view.



Example: Post-migration Unified Interface view

b. Post-migration Unified Interface view.



> **Note**
>
> The following limitations are applicable when defining a condition in Customer Service Hub:
>
> - The Date & Time picker control is no longer available in the conditions; however, you can still edit the date and time in the text field.
> - Only one level of the related entity hierarchy is supported, though the application lets you select nested, related entities.
> - The related entity inside a group of the and/or clause isn't supported.
> - The "not-on" operator for the Date data type is not supported.
> - For the lookups data type, only the "equal," "not equal," "null," and "not null" operators are supported. The "under" and "not-under" operators aren't supported.

Can I migrate a rule again after it's been activated?

- **Yes, for automatic record creation rules.** You can migrate an activated rule again, but you must first deactivate and delete it from Unified Interface before you can migrate it again.
- **No for SLAs.** After a migrated SLA rule is activated, it's linked to another entity (such as a case or is in use). To attempt to migrate an activated rule (which is a successfully migrated rule by default) again, you'd need to delete that specific rule.

However, there's a limitation with Unified Interface SLA rules, and once a rule is associated with a case or entity (that is, if it has been activated even once), you can't delete the rule even if it is deactivated. Therefore, the rule cannot be migrated again if it has been previously activated or applied.

Can I migrate deprecated standard SLA rules?

No. The migration tool only supports enhanced SLA rules. Standard SLA rules have been deprecated and are no longer supported in Unified Interface and therefore aren't supported in the migration tool. For more information, go to Standard SLAs in Dynamics 365 Customer Service are deprecated.

Known issues

Channel property deprecation

If you've used any channel properties in legacy rules customization, those rules won't be migrated successfully using the migration tool. There isn't a general workaround that can be applied to resolve this gap for all users. The workaround is highly dependent on how you use the channel properties in the legacy rules.

Behavior difference when the option “Create cases for activities associated with a resolved case” option is selected.

- Legacy behavior: If the email has a related case that was resolved since the specified time, the resolved case will be reactivated out of the box without customization.
- Modern behavior: If the email has a related case that was resolved since the specified time, a new case will be created out of the box. Customization is required to reactivate an existing case instead of creating a new case.

Behavior difference when the option “Create case if a valid entitlement exists for the customer” option is selected.

- Legacy behavior: If the email sender doesn't have a valid entitlement and the email has a related case, the existing related case will be updated.

- Modern behavior: If the email sender doesn't have a valid entitlement, no flow will be invoked.

Parity gaps between workflow and Power automate flow, applies only to customization on rule item actions

- “First not null” expression can’t be migrated automatically. Customization can be manually applied on the flow for the migration.
- Mapping a lookup record’s display name to a string field can’t be migrated automatically. Customization can be manually applied on the flow for the migration.
- Activity party fields used as source fields aren't supported in flow.

Known flow issues

Migrated rules have an extra @ character for fields with @ string type

If the legacy automatic record creation rule workflow is customized and has a plain text @ character in a string field, you’ll see two @, instead of one on migration. For example, if you add an email address in plain text in the case description field, then the @ character will be treated as a special character and migrated as @@.

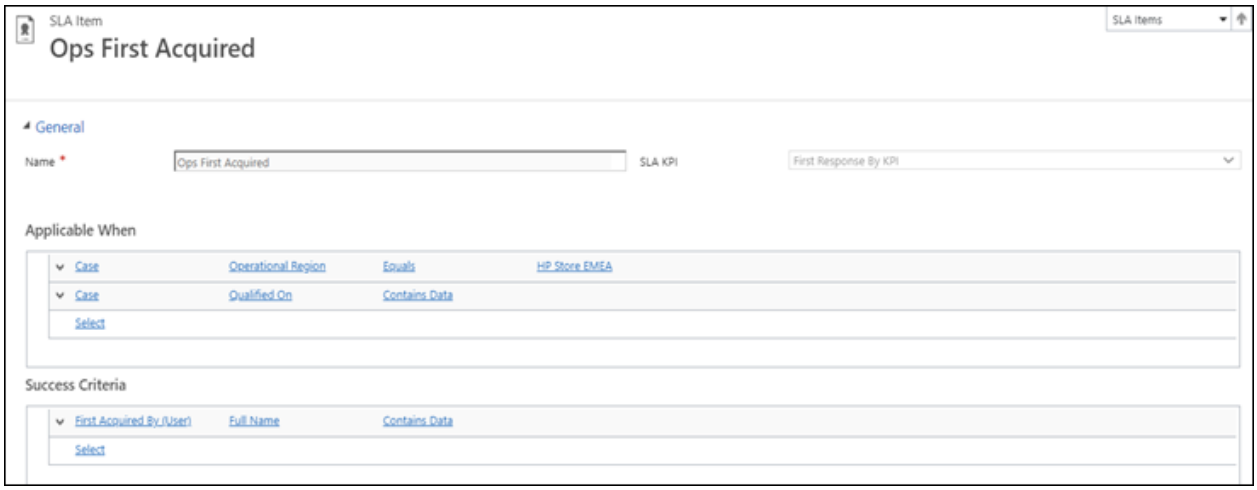
This is because @ is identified as a special character for any dynamics expression, such as @triggerOutputs()?[body/_emailsender_value] in the migration flow.

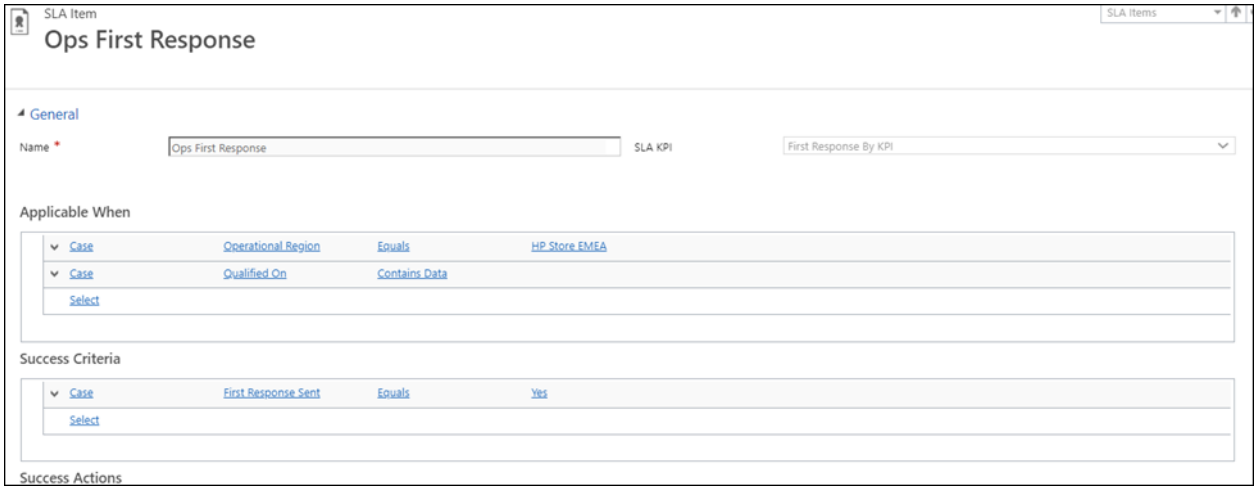
The workaround is to manually remove the extra @ in the migrated flow.

Migration doesn't support multiple items or conditions having the same "applicable when" within same SLA

In the web client, multiple items can be defined with the same "applicable when" condition and different success criteria for an SLA. However, the same capability isn't supported in Unified Interface. Therefore, during migration, the second or subsequent such SLA item with the same "applicable when" condition won't be created. The

following screenshots capture the scenario that isn't supported in Unified Interface.





Activity party-type attribute issues during workflow-to-flow conversion

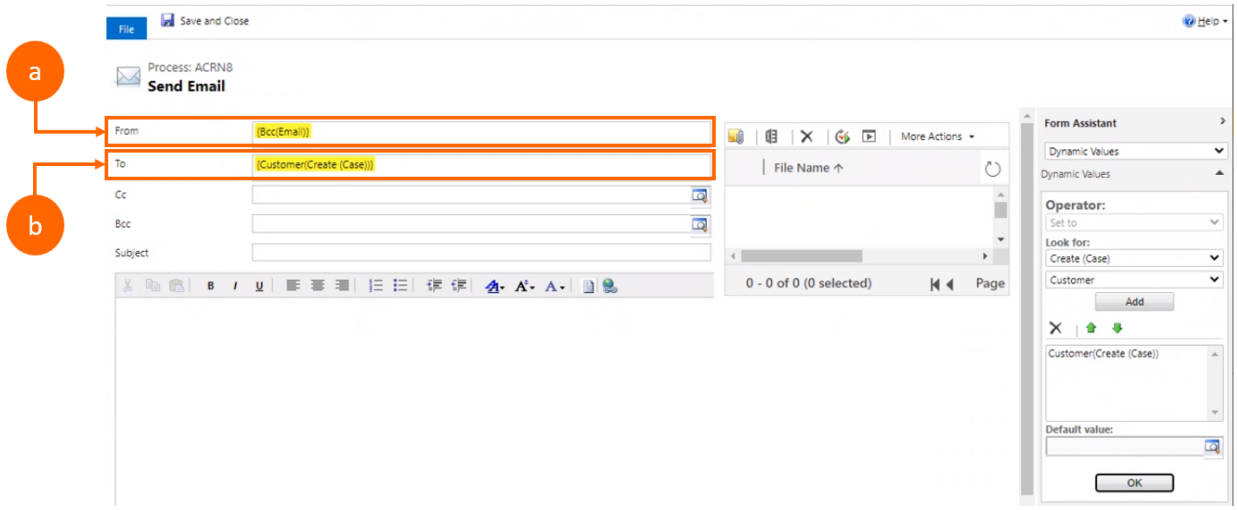
Any activity party-type attribute assigned to another activity party-type field (the most commonly impacted fields are: to, from, cc, and bcc, in emails) won't migrate during the workflow-to-flow conversion, as Flow currently doesn't support this scenario. Although the migration of the rule won't fail, the data value for such activity party-type fields that relies on another activity party-type attribute will be empty post-migration.

Example: Premigration view

a. The **From** field, which is an activity party-type field that's assigned another activity party-type attribute **{Bcc(Email)}** will be empty post-migration.

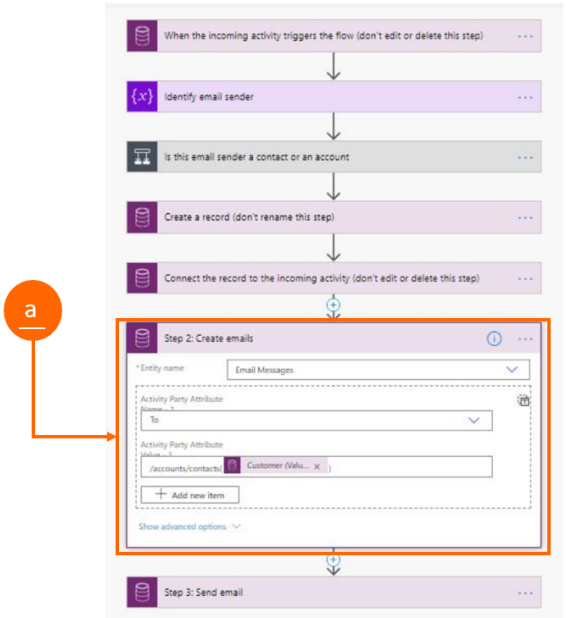
b. The **To** field will migrate.

Web Client View



Example: Post-migration Unified Interface view

b. The **To** field post-migration.



First not null checks in expressions within legacy workflow during workflow-to-flow conversion is not supported.

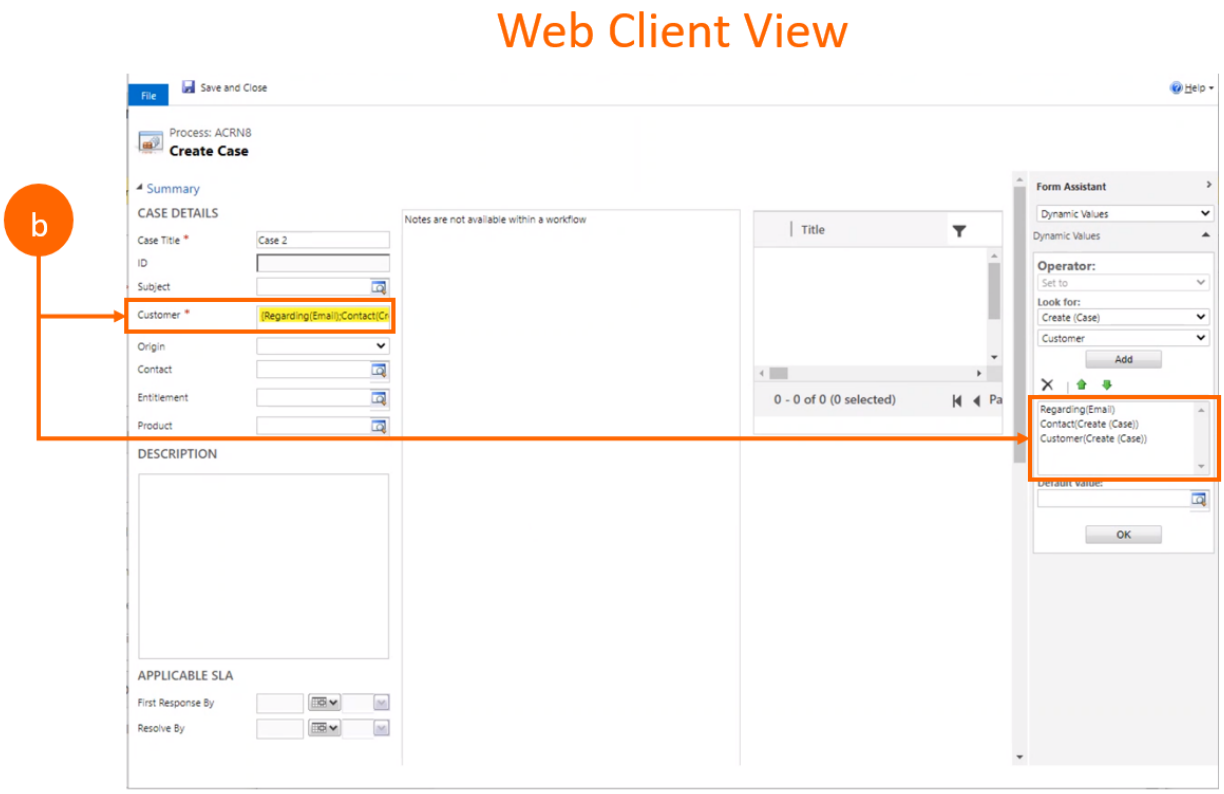
In legacy workflows, a lookup field can be mapped with multiple expressions where you check and assign the **First Not Null** expression, as shown in the web client example below. Currently, this isn't supported as part of workflow-to-flow conversion, as it's a known limitation from the legacy workflow designer. Therefore, the workflow converter assigns the first expression (without performing the null check) and removes the rest of the expressions, irrespective of whether they have **non-null** values. In the sample

snapshot that follows, the flow will only have **Regarding(Email)** in the **Customer** field within this step.

Example: Premigration view

a. Unified Interface view: In Flow, the Customer field will only have: **Regarding(Email)** regardless of whether it is null.

b. Web client view: In the workflow, the Customer field has: **{Regarding(Email); Contact(Create (Case)); Customer(Create (Case))}**



> **ⓘ Important**
>
> If you're still experiencing issues with the migration tool, contact your administrator or Microsoft support.

See also

FAQ about modern automatic record creation

Migrate automatic record creation rules and SLAs

Dynamics 365 SLA and ARC Migration Playbook

Deprecations in Customer Service

Article • 10/18/2023

The features that have been deprecated in Customer Service are listed in this article.

Administrators and IT professionals can use this information to prepare for future releases.

> **Important**
>
> "Deprecated" means we intend to remove the feature or capability in a major future release. The feature or capability will continue to work and will be fully supported until it is officially removed. This deprecation notification might span a few years. After removal, the feature or capability will no longer work. We are notifying you now so that you have sufficient time to plan and update your code before the feature or capability is removed.

Intraday insights reports in Omnichannel for Customer Service are deprecated

The Omnichannel intraday insights reports are deprecated as of May 1, 2023. Support will continue to be available for the deprecated intraday insights reports until October 31, 2023. However, no new functionalities for intraday insights will be released henceforth.

Effective April 30, 2024, Omnichannel intraday insights reports won't be available for existing organizations. Reports won’t be available for new organizations or tenants onboarded after May 01, 2023, or for those organizations that haven’t used the reports in the last 30 days.

Some admin apps are deprecated

With the release of the Customer Service admin center app that consolidates admin experiences across the Customer Service suite, we announce that the following admin experiences are deprecated and no longer supported after April 2023.

- Service Management area in the Customer Service Hub app
- Omnichannel admin center
- **App profile manager:** Is removed in April 2023.

Also, as of October 2022, the Omnichannel admin center and the service management area in Customer Service Hub are hidden by default in newly created organizations and environments. You can bring them back, but we recommend that you start using the Customer Service admin center app to perform tasks like manage cases, and configure unified routing, channels, and agent experience profiles. More information: Get started with Customer Service admin center

Omnichannel Administration app is deprecated and removed in July 2023

Support for the Omnichannel Administration app ended on April 30, 2022, and the app was removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: Get started with Customer Service admin center

Omnichannel for Customer Service agent-facing app is deprecated and will be removed in June 2024

Effective April 2023, the Omnichannel for Customer Service agent-facing app is deprecated. Support is available until June 2024. We recommend that you migrate your omnichannel configuration to Customer Service workspace. More information: Migrate from Omnichannel for Customer Service to Customer Service workspace

setContextProvider method for authenticated chat is deprecated

The setContextProvider method for authenticated chat has been deprecated and isn't supported as of October 1, 2021. We recommend that you use the JWT token for authenticated chat. More information: Send authentication tokens

Support for some knowledge management entities is deprecated

The KbArticle, KbArticleComment, and KbArticleTemplate knowledge management entities that were deprecated earlier aren't supported as of October 1, 2021. We recommend that you use the newer KnowledgeArticle entity (introduced in CRM Online

2016 Update and Dynamics 365) for knowledge management in Dynamics 365. More information: Work with knowledge articles

Internet Explorer 11 support for Dynamics 365 and Microsoft Power Platform is deprecated

Effective October 31, 2022, Dynamics 365 Customer Service and Power Platform are blocked in Internet Explorer. As of early October 2022, users are redirected to Microsoft Edge if it's installed on their device. Otherwise, they'll receive a non-dismissible message informing them why they're blocked and to use Customer Service on Microsoft Edge. More information: Support end for Internet Explorer

For any questions, contact your Microsoft Customer Service representative or Microsoft Partner.

Automatic record creation rules in web client are deprecated

Effective October 01, 2020, the automatic record creation and update rules are deprecated in the web client. We recommend that you migrate your automatic record creation rules that were created in the web client to the new Unified Interface experience. For information on how to migrate the rules, see Migrate automatic record creation rules and service-level agreements. You can also refer to the migration playbook, which includes all the information you need to work on the migration. More information: Dynamics 365 SLA and ARC Migration Playbook.

Microsoft will continue to provide support and critical security updates for these features in the web client until April 01, 2023.

> **Note**
>
> The deprecation isn't applicable to the features in Dynamics 365 Customer Engagement (on-premises).

SLAs in web client are deprecated

Effective October 1, 2020, the service-level agreements (SLAs) are deprecated in the web client. We recommend that you migrate your SLAs that were created in the web client to the new Unified Interface experience. For information on how to migrate the items, see

Migrate automatic record creation rules and service-level agreements. You can also refer to the migration playbook, which includes all the information you need to work on the migration. More information: Dynamics 365 SLA and ARC Migration Playbook.

Microsoft will continue to provide support and critical security updates for these features in the web client until April 1, 2023.

> **Note**
>
> The deprecation isn't applicable to the features in Dynamics 365 Customer Engagement (on-premises).

Service scheduling in Dynamics 365 Customer Service is deprecated

The existing service scheduling functionality is deprecated, and is longer available as of December 1, 2020. The new scheduling experience, built on Universal Resource Scheduling, is now available in Unified Interface.

Existing service scheduling users will be provided advance notice for a time bound migration to the new scheduling capabilities.

There are two approaches to migrate to the scheduling experience:

Follow the guidance in the Service Scheduling Guide to set up the new scheduling experience for an existing Dynamics 365 Customer Service organization.

If your organization requires features that rely on legacy APIs, the product team is offering an incremental migration option and will update your organization to the Unified Interface experience and continue to allow the use of the legacy APIs. This approach is available as of 2020 release wave 2 with Early Access in August 2020.

Contracts, Contract Line Items, and Contract Templates entities are deprecated

The Contracts, Contract Line Items, and Contract Templates entities are deprecated and aren't supported as of April 1, 2022. They'll be removed in a future major release of Dynamics 365. This functionality has been replaced by entitlements in Unified Interface. The web client will not be available after Tuesday, December 1, 2020, and you must migrate to Unified Interface by this date. We recommend that you migrate your

contracts to entitlements at the earliest to avoid any loss in functionality. For information on the migration strategy, see Strategy for migrating from contracts to entitlements.

Standard SLAs in Dynamics 365 Customer Service are deprecated

Standard service level agreements (SLA Type field is set to Standard) are deprecated and will be removed in a future major release. Standard SLAs are replaced by enhanced SLAs. More information: Enhanced service level agreements

Customer Service Insights standalone app is deprecated

The Customer Service Insights standalone app is deprecated. We recommend that you migrate to the embedded experience within the core Dynamics 365 Customer Service applications.

Customer Service workspace legacy layout is deprecated

The Customer Service workspace legacy layout is deprecated as of April 2023, and won't be supported after October 2023. For more information, see Deprecated Customer Service workspace layout

See also

Automatically create or update records in Customer Service Hub
Define service-level agreements
Important changes (deprecations) coming in Power Apps, Power Automate

Routing and assignment in Omnichannel Administration

Article • 06/15/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> - Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated and will be removed in July 2023**.
> - We recommend that you upgrade to the latest version of Omnichannel for Customer Service and use unified routing. For more information, see **Overview of unified routing**. With the upgrade, you can also use the Customer Service admin center app. For more information, see **Customer Service admin center**.

Routing and work assignment ensures that conversations from all the channels are routed to agents efficiently.

Advantages of routing and work assignment are as follows:

- Automate work assignments across channels.
- Set up work assignments for the best available agents based on their capacity and presence.
- Analyze and manage agent productivity across channels.

Routing and work assignment is a two-step process:

1. Routing dispatches conversations into the right queues.
2. Work assignment allocates the conversations in a queue to agents in real time, based on capacity and presence.

Overview of routing system

A customer initiates a conversation from the portal, and the conversation reaches the Omnichannel system. Now, based on the routing rules condition defined in the routing system, it starts routing the conversation to the appropriate queues.

The routing rules condition is based on the channel, CRM, and customer context that you, as an administrator, define in the Omnichannel Administration app.

When the conversation reaches to the queues, the work assignment system assigns the conversation based on triggers that are explained in the following sections.

Overview of work assignment system

> **Important**
>
> If you've upgraded your Omnichannel for Customer Service environment to 2021 release wave 1, your queues will start using unified routing services for assignment. By default, all existing queues will use the "highest capacity" assignment method for work assignment. You can change the assignment method to round robin or a custom assignment method according to your need. More information: **Set up assignment methods in Customer Service**.

The work assignment system assigns the conversation (work item) to an agent based on the following triggers:

- Work item available trigger
- Agent available trigger

Work item available trigger

When a conversation is present in a queue, the work assignment system searches for the best available agent based on the capacity and presence if there are no other conversations present in the queue.

If there are other conversations present in the queues, then the conversation will be added to the end of the queue and will be assigned to the agents after other conversations are assigned.

Agent available trigger

The work assignment system assigns one of the existing conversations that is in the queues when an agent is available.

An agent is available in the following scenarios:

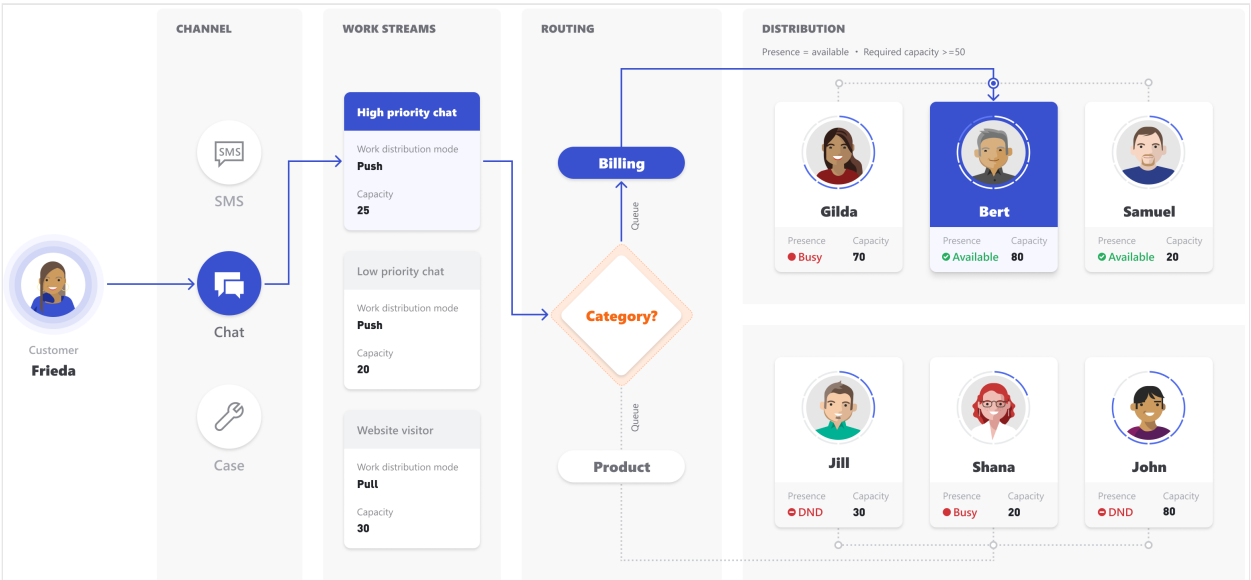
- When an agent signs in to the Omnichannel for Customer Service app.
- When an agent presence status changes from one state to another, such as **Away** to **Available**, **Away** to **Busy**, and **Away** to **DND**. An agent is also available depending on the allowed presence that is configured for the work stream.
- When an agent capacity changes due to the closure of a conversation or assignment of a conversation.
- The agent affinity is set to yes for a work stream.

Whenever agents are available, the work assignment system always retrieves the oldest conversations (longer duration) that is present in the highest priority queue and assigns the conversation to the agent who satisfies the capacity condition.

Scenario walk-through of routing and work assignment

The following section outlines a scenario to understand unified routing and work assignment and how conversations are assigned to agents.

A customer initiates a conversation (chat) regarding **Billing**. Now, routing and work assignment help route the conversation to the **Billing** queue, and assign the conversation to an agent who is a member of the queue with the required presence and capacity. This is shown in the following illustration.



Let us see the steps involved in the scenario walk-through.

- When a chat conversation originates from the customer, the system identifies the channel, and the routing and work assignment configuration details are applied. These configuration details are defined in the workstreams. Learn more, see Understand and create work streams.

  In this walk-through, the system identifies the work stream as **Product & Billing live chat** and applies the configuration details of the work stream to the incoming conversation. In this work-stream, the conversation requires a capacity of **50 units**. This implies that when the system assigns this conversation to an agent, the system blocks 50 units of agent's capacity.

- Next, the routing and work assignment logic starts. With the help of context variables, **Routing rules** identify that the conversation belongs to the **Billing** queue, and the system routes to the **Billing** queue.

- As the conversation reaches the Billing queue, the system allocates the conversation to one of the agents of the Billing queue, who satisfy the following criteria:
  - Capacity is **50 units** or more.
  - Presence status is **Available**.

As **Bert** has the required capacity and presence, the system assigns the conversation to **Bert**. After Bert starts working on the conversation, the presence changes to **Busy** and the remaining capacity is updated to **30 units**.

Adjusting an agent's capacity based on conversation allocation

Agent capacity is specified by the administrator in the User settings. See Manage users to learn how to set agent capacity. An agent's capacity is adjusted by the system when a conversation is allocated, and the following actions occur:

- The conversation is added to the agent's **My Items** list.
- The agent's presence status changes to **Busy** or **Busy DND**.
- The agent's utilized capacity increases.
- The agent's available capacity decreases.

Adjusting an agent's capacity based on closure of allocated conversation

When an agent has finished working on a conversation, the system adds the capacity back to the agent's availability, and the following actions occur:

- The conversation is removed from the agent's **My Items** list.
- The agent's presence status changes to **Available**.
- The agent's utilized capacity decreases.
- The agent's available capacity increases to the extent of free capacity.

If conversations are waiting to be assigned, they are allocated as soon as the agent becomes available.

To effectively route and distribute work to agents, admins can set up the following items in Omnichannel for Customer Service:

- Assign roles and enable users for Omnichannel for Customer Service
- Manage users in Omnichannel for Customer Service
- Understand and create work streams
- Configure a chat channel
- Configure an SMS channel
- Work with queues in Omnichannel for Customer Service
- Automatically identify customers using pre-chat responses
- Create and manage routing rules
- Configure and manage custom presence

See also

Omnichannel for Customer Service for administrators

Create workstreams in Omnichannel Administration

Article • 06/15/2022

ⓘ Important

- Support for the Omnichannel Administration app ended on April 30, 2022. We recommend that you use the Omnichannel admin center or Customer Service admin center app to configure the latest features, such as unified routing and voice channel. For more information about the deprecation announcement, see Omnichannel Administration app is deprecated.
- Additionally, workstreams that you create in the Omnichannel Administration app can't be modified in the Omnichannel admin center app. You'll need to migrate the existing workstreams and then manage them in the Omnichannel admin center app. More information: **Migrate workstreams created in Omnichannel Administration**

Introduction

A workstream is a collection of routing rules. Routing settings define how conversations should be routed to queues. Work distribution settings define how conversations should be allocated to agents within a queue. You can create the workstreams in the Omnichannel admin center, Customer Service Hub, and Omnichannel Administration apps.

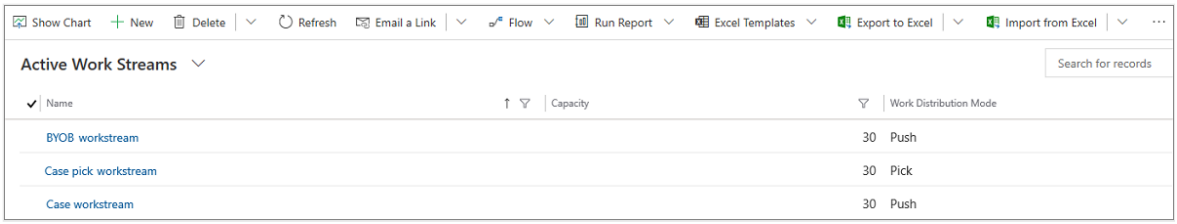
A workstream can belong to multiple channels of the same type, like multiple chat channels. In this case, all the conversations from these channels inherit the routing and work distribution settings of the workstream they belong to.

If you want to create workstreams to configure unified routing, see Create workstreams in Omnichannel admin center.

Perform the following steps:

1. In the Omnichannel Administration site map, go to **Work Distribution Management** > **Work Streams**.

   The **Active Work Streams** view is displayed.



2. On the command bar, select **New** to create a work stream.

3. In the **Work Distribution** tab of the new work stream, follow these steps:

   a. In the **General information** section, specify the following information:

   - **Name**: Enter a name for the workstream.
   - **Channel**: Channel is defined as a medium through which a customer reaches out for support. For example, a customer can contact an agent through chat.

     Select a channel from the dropdown list:
     - Live chat
     - SMS
     - Facebook
     - Entity Records
     - WeChat
     - Microsoft Teams
     - LINE
     - WhatsApp
     - Custom
     - Twitter
   - **Capacity**: Specify the units of capacity that are required to process a single conversation for the workstream in the text box. For information on how to determine capacity units, see Capacity.
   - **Auto-close after inactivity**: Enter the unit of time after which a conversation is moved from **Waiting** to **Closed** state because of inactivity.

   b. Select **Save**. The workstream is saved.

   c. In the **Work distribution settings** section, perform the following steps:
      i. Select whether the **Work distribution mode** should be **Push** or **Pick** for agents to take up a conversation.
      ii. In **Allowed Presences**, select a base presence, such as **Available** and **Busy**, from the dropdown. You can select all options also. Agents will be allocated work items if the agent presence is set to one of the statuses specified here.

If you have enabled missed notifications, do not select **Away** as an allowed presence. For information, see Configure and manage custom presence.

iii. If you have selected **Push** in **Work distribution mode**, set the toggle to **Yes** for **Enable selecting from push-based work streams**. The agents can assign work items to themselves irrespective of constraints, such as capacity and presence.

iv. If you want an ongoing conversation to be assigned to the same agent when the conversation status changes from waiting to active, make sure the **Enable Agent Affinity** is set to yes. By default, the toggle is enabled for SMS and social channels.

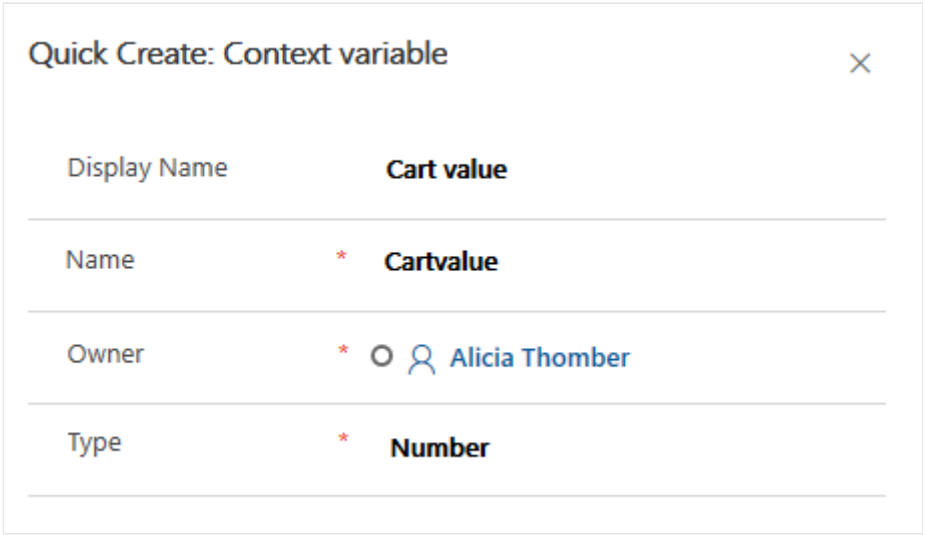
> **Note**
>
> The **Enable Agent Affinity** option is available only when the work distribution mode is push. More information: **Agent affinity**

4. View and create context variables in the **Context variables** tab. Context variables enrich conversations with pre-chat data, channel data, and custom context data. These attributes can then be used to define routing rules to route conversations to different queues.

   a. Select **New** to create a context variable in the **Quick Create** window.

   b. Enter **Display Name** for the new variable. The **Name** field is populated accordingly.

   c. Select the **Type** of variable from the drop-down list. You can choose from **Text** or **Number**.



5. Define routing rule items in the **Routing rule items** tab. Routing rule items are configured for each work stream, so that conversations can be routed to the

correct queues. To learn how to configure a routing rule, see Create and manage routing rules in Omnichannel.

6. Select **Save**. The workstream is saved.

Associate workstreams with channel artifacts

You can associate work streams with channel artifacts so that the conversations can be assigned to agents seamlessly. For example, for a live chat widget, a default workstream is already associated in the **Work stream** field. You can select the search icon to associate another workstream. Select **New** to create a new workstream from within the live chat widget.

See also

Manage users in Omnichannel for Customer Service
Create workstream for entity record routing in Omnichannel Administration
Work with queues
Automatically identify customers using pre-chat responses

Create queues in the Omnichannel Administration app

Article • 10/18/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> - Support for the Omnichannel Administration app ended on April 30, 2022, and the app was removed in July 2023. We recommend that you use the **Customer Service admin center** app to configure the latest features, such as unified routing and the voice channel. More information: **Omnichannel Administration app is deprecated and will be removed in July 2023**.
> - We recommend that you upgrade to the latest version of Omnichannel for Customer Service and use unified routing. For more information, see **Overview of unified routing**.

Introduction

In Omnichannel for Customer Service, queues are used for collecting and distributing workload among agents. The workload includes conversations, such as chat or SMS. Agents are added as members to the queues, and the workload is distributed among these agents.

Route conversations to queues

Queues in Omnichannel for Customer Service are proxies for skills or domains. You can create separate queues for each line of business, such as billing, investment, and products. When a customer query is raised for any of the areas, it is routed to the corresponding designated queue. You also can set up a customer support availability matrix by using a combination of queues, operating hour schedules, and routing rules.

In an enterprise scenario, you can have various supervisors handling different issues, and therefore, different types of queues are required to handle the various scenarios. Accordingly, routing rules are set up based on the complexity of issues that need to be handled.

To simplify the routing experience for administrators and supervisors, queues are categorized based on the channel types as follows:

- **Messaging**: To route all messaging conversations pertaining to the live chat, SMS, and social channels.
- **Entity records**: To route cases pertaining to entity records.

The queue types help ensure that issues will be routed correctly and help avoid cross-queue assignments. When you configure workstreams and routing rule items, the queues that will be available for selection will be based on the channel type for the workstream. For example, for routing rules for a live chat workstream, only messaging-type queues will be shown for selection. Similarly, in a conversation transfer scenario, you can transfer a chat conversation only to a messaging queue and a case to an entity queue.

Create queues in Omnichannel Administration

Out of the box, the following default queues are available in Omnichannel for Customer Service:

- **Default entity queue**: The queue that is available for routing entity records.
- **Default messaging queue**: The queue that is available for routing all messaging conversations pertaining to the live chat, SMS, and social channels.

The default queues can't be edited or deleted. All Omnichannel for Customer Service users are members of the default queues. Therefore, the membership of these default queues also can't be changed.

> ⓘ **Note**
>
> When no custom queues or routing rules are defined, all conversations are directed to one of the out-of-the-box default queues based on the work item type.

Perform the following steps to create a queue in Omnichannel for Customer Service:

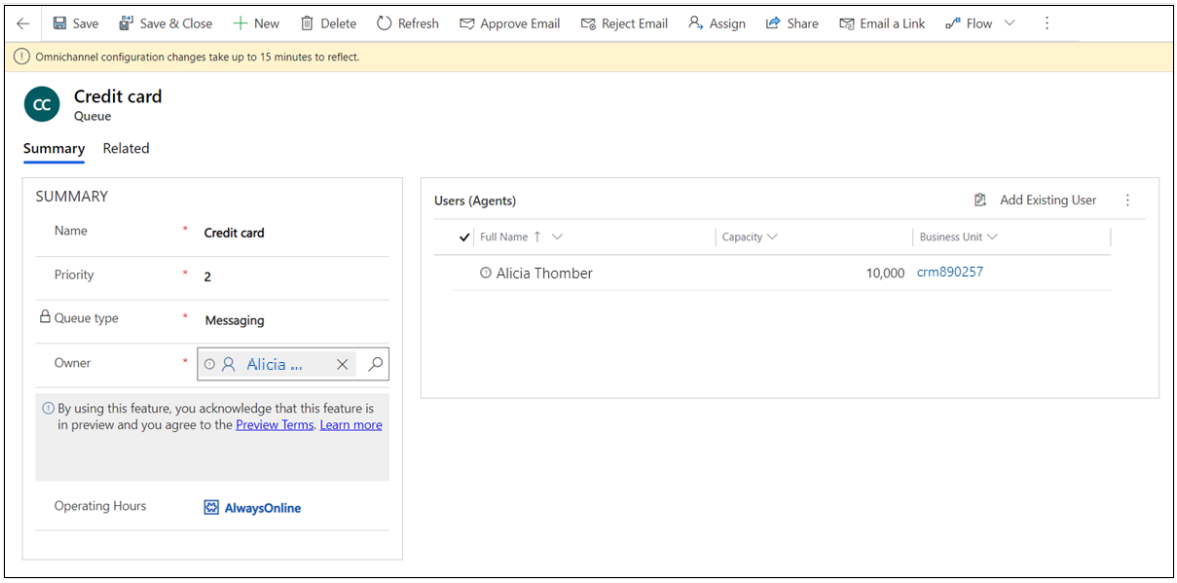
1. In the Omnichannel Administration site map, go to **Queues & Users** > **Queues**. The **Omnichannel queues** view is displayed.

2. On the command bar, select **New**.

3. On the **Summary** tab, in the **General Information** section, provide the following information:

   - **Name**: Enter a name for the queue.
   - **Priority**: Assign a priority to define how quickly a conversation should be picked from the queue.
   - **Queue type**: Select either **Messaging** or **Entity**. You can't edit the queue type after you save the queue.
   - **Owner**: Search and select an owner for the queue if you do not want to use the default owner.
   - **Operating Hours**: Search and select an operating hour schedule that you want to specify for the queue.

4. Select **Save**. The **Users (Agents)** section is displayed.



5. In the **Users (Agents)** section, select **Add Existing User** to add existing agents to the queue.

6. On the **Lookup Records** flyout menu, select the agents to add, and then select **Add**.

> **Tip**
>
> To select users from other views, you can change the view by selecting **Change View**.

> **Important**

If you've upgraded your Omnichannel for Customer Service environment to 2021 release wave 1, your queues will start using unified routing services for assignment. By default, all existing queues will use the "highest capacity" assignment method for work distribution. You can change the assignment method to round robin or a custom assignment method according to your need. More information: **Set up assignment methods in Customer Service**.

See also

Create workstreams in Omnichannel Administration
Understand routing and work distribution
Create and manage operating hours

Create and manage routing rules in Omnichannel Administration

Article • 10/18/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Important

- Support for the Omnichannel Administration app ended on April 30, 2022. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. For more information about the deprecation announcement, see Omnichannel Administration app is deprecated.
- Additionally, workstreams that you create in the Omnichannel Administration app can't be modified in the Customer Service admin center app. You'll need to migrate the existing workstreams and then manage them in the Customer Service admin center app. More information: **Migrate workstreams created in Omnichannel Administration**

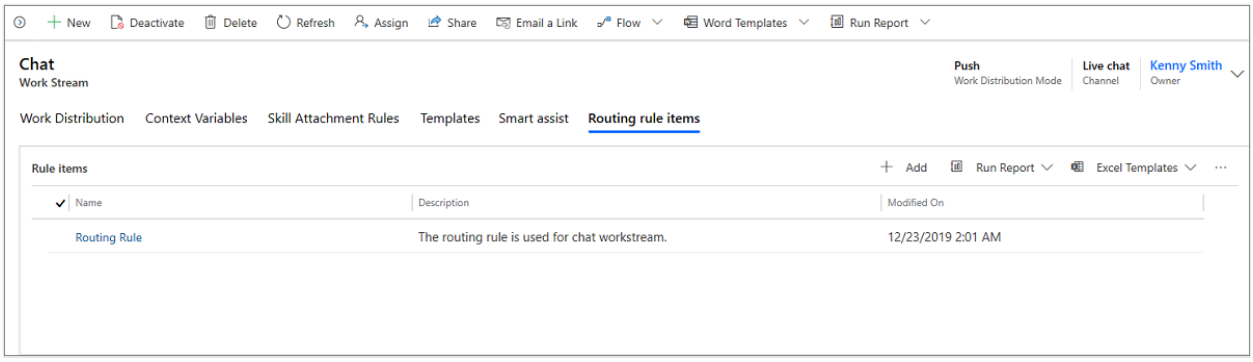
Introduction

Routing rules define how conversations are routed to different queues. Each routing rule has a condition and a destination queue. If the rule condition is evaluated as **True**, then the conversation is routed to the destination queue.

Important

Routing rules for entity records are defined at the entity record channel level. To learn more, see **Entity records routing**.

A single work stream can have multiple routing rules that are evaluated in the order of definition. For example, if a work stream called **Chat** contains 5 routing rules, an incoming chat conversation will be evaluated against all the 5 routing rules in the defined order. While you can define as many rules as your business requires, the application processes only the first 100 rules.



Routing rules are evaluated from top to bottom. If a rule condition is evaluated as **True**, the chat gets routed to the destination queue and skips further evaluation. If a rule condition is evaluated as **False**, further rules are evaluated.

Routing rule conditions could be based on channel context, pre-chat context, and contact, account, or case context. For example, you can define a routing rule so that chats from high priority customers who have specific queries about investments can be routed to a specific queue.

> **ⓘ Important**
>
> If all the rule conditions are evaluated as False for a conversation, it goes to the **Default** queue. For more information, see **Queues in Omnichannel for Customer Service**.

Create a routing rule

To create a routing rule, select a work stream by navigating to **Work Distribution Management** > **Work Streams**, and define a new rule in the **Routing Rule Items** tab.

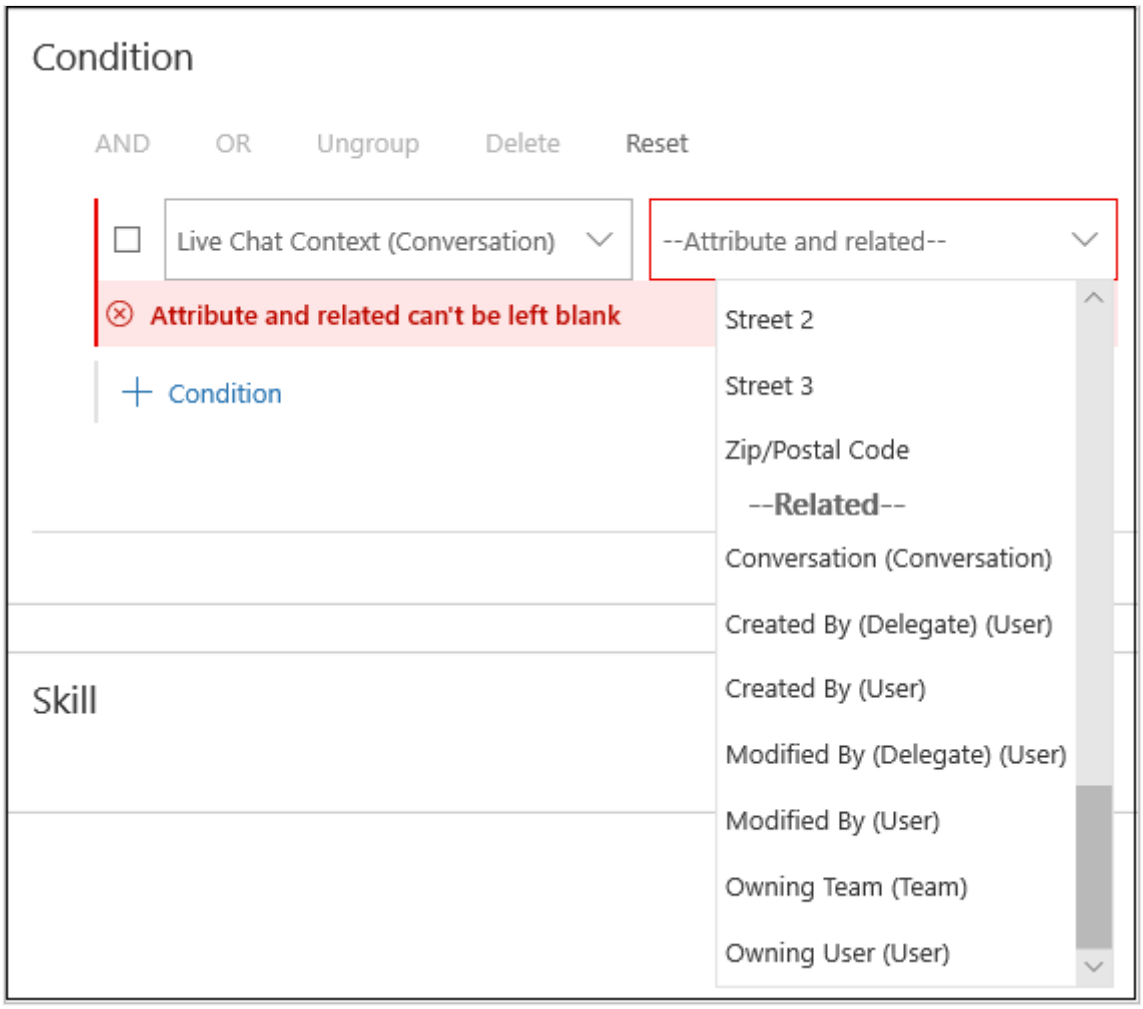
1. Select **Add**. The **New Rule Item** page appears.
    a. In the **General information** section of the **General** tab, provide the following information:
        i. **Name**. Name of the rule item
        ii. **Work Stream** is auto populated
        iii. **Queue**. Look up a queue or select **New** to add a new queue. For more information, see Create a queue in Omnichannel for Customer Service

b. **Description**. A brief description of the rule item.

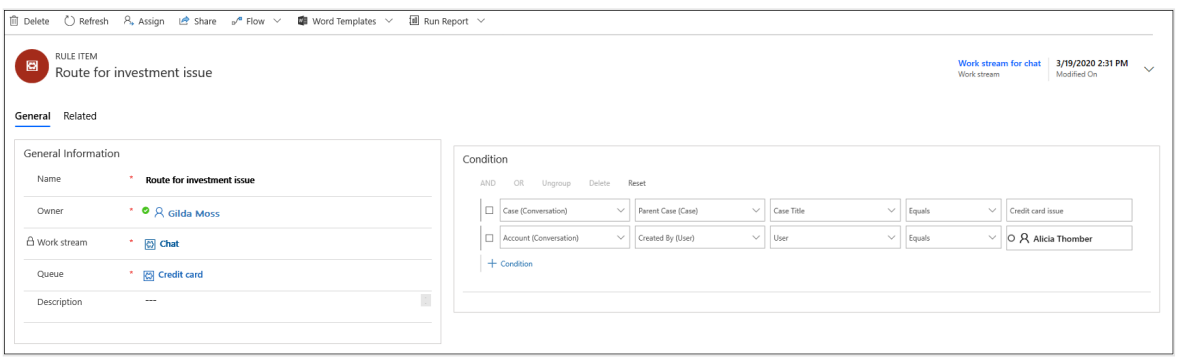
c. In the **Condition** section, provide the conditions for the rule. Based on the conditions defined, the conversations are routed to the correct queues. You can define the conditions based on the following:

- Entity
- Attribute or related entity
- Attribute
- Operator
- Value

For an entity, you can define rules based on related level 1 attributes.



2. Select **Save**.



See also

Understand and create workstreams

Understand unified routing and work distribution

Create workstreams for record routing in Omnichannel Administration

Article • 06/15/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Important

- Support for the Omnichannel Administration app ended on April 30, 2022. We recommend that you use the Omnichannel admin center or Customer Service admin center app to configure the latest features, such as unified routing and voice channel. For more information about the deprecation announcement, see **Omnichannel Administration app is deprecated**.
- You can no longer configure record routing in the Omnichannel Administration app because it will not work as expected. If you have existing workstreams for routing records, you'll need to recreate them in the Customer Service admin center app. More information: **Migrate workstreams for routing records**

Create a record workstream

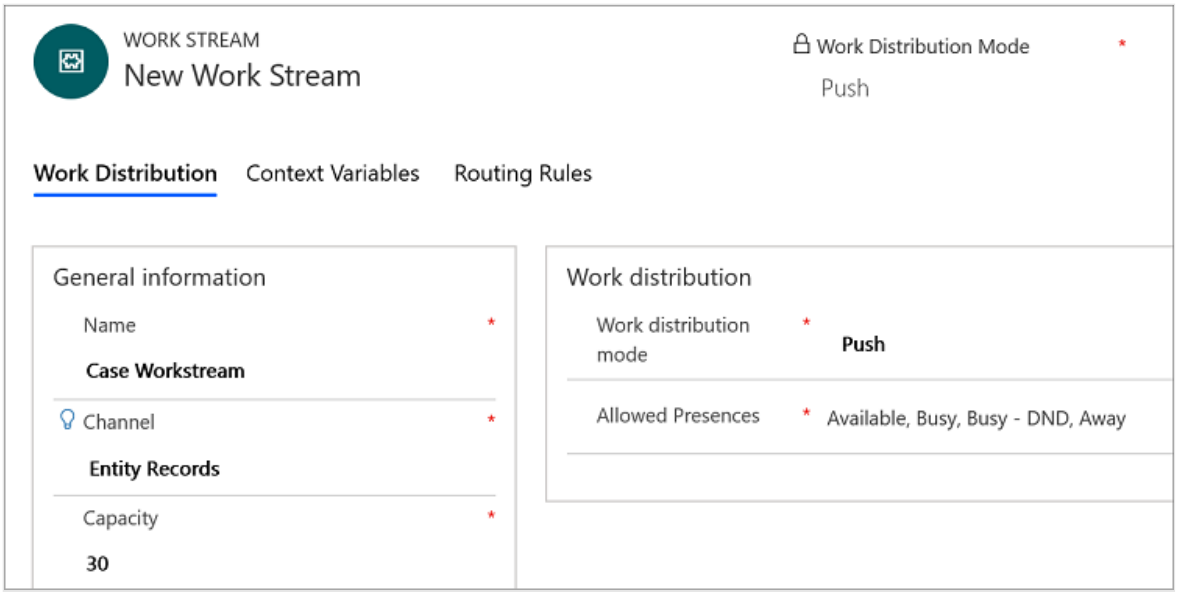
To route records, as a first step, you need to enable entity for routing using entity records channel configuration. To learn more Entity records routing.

This topic describes how to create a work stream for an entity that has been enabled for routing.

1. Sign in to the Omnichannel Administration app.
2. Select **Work Streams** under **Channels** in the site map.
3. Select **New** in the **Active Work Streams** page.

4. Specify the following in the **New Work Stream** page.

Tab	Field	Value	Description
Work Distribution	Name	Case Work stream	Provide a name to the work stream. **Note:** The value provided is an example.
Work Distribution	Channel	Entity Records	Select the **Entity Records** channel from the list.
Work Distribution	Entity	Case	Select an entity from the drop-down menu. If you want to create a entity, select + **New**. To learn more, see Enable entity for routing.
Work Distribution	Capacity	50	Specify the units of capacity that are required to process a conversation for the work stream in the text box. **Note:** • The value provided is an example.
Work Distribution	Work distribution mode	Push	Select **Push** when you want to automatically route the cases to the agents. Select **Pick** when you want the agents to explicitly pick a conversation from the **Open work items** in agent dashboard.
Work Distribution	Allowed presences	Allowed, Busy	Set the allowed presence status Select the option and type a presence status in the search box. Select a status from the list. **Note:** • The value provided is an example.



5. Select **Save** to save the work stream.

> **Note**
>
> When you enable an entity for routing, the Omnichannel Administration app creates a default workstream for the entity. If you create a new work stream or update the default work stream according to your business scenario, you need to update the work stream information in **Entity Records distribution Flow**. To learn more, see **Update entity records work distribution flow**.

Upgrade path for preview users

If you are upgrading to the latest version from a preview version, then earlier configured work streams will be obsolete. You need to create a new entity records channel and then redefine the workstreams.

See also

Entity records routing

Understand and create work streams

Create multiple work streams for entity records routing

Create multiple work streams for entity records routing in Omnichannel Administration

Article • 06/15/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Important

- Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and the voice channel. More information: **Omnichannel Administration app is deprecated and will be removed in July 2023**.
- We recommend that you upgrade to the latest version of Omnichannel for Customer Service and use unified routing. For more information, see **Overview of unified routing**. With the upgrade, you can also use the Customer Service admin center app. For more information, see **Customer Service admin center**.

Overview

You can setup multiple work streams for same entity records if you want to distribute the entity records using different work streams based on certain conditions.

For example, you want high priority cases to be pushed to agents and demand more capacity than low priority cases, which can be picked by agents. You can achieve it by configuring multiple work streams.

This walkthrough demonstrates how to set up two work streams, one each for high priority cases and low priority cases and to distribute the cases appropriately.

In this section

Step 1: Create work stream

Step 2: Update Entity Record Distribution Flow

Step 1: Create work stream

Create entity records work stream to define how the records will be distributed. In this walkthrough, we will create two work streams - **High Priority Cases** and **Low Priority Cases**.

High priority cases work stream is set up to distribute the cases using automatic push, and the capacity required in 60 units.

Low priority cases work stream is set up to distribute the cases for manual pick up, and capacity required is 30 units.

To learn more, see Create workstream for entity record routing.

Step 2: Update entity records distribution flow

If you create or edit an entity record work stream, you must update **Entity records Distribution Flow**. The Omnichannel Administration app automatically creates this flow out-of-the-box for distributing entity records.

Entity records Distribution Flow contains the following components.

Component	Modification recommendation
When the record is created	Do not modify.
Initialization	Do not modify.
Omnichannel Work Distribution	You can see the list of entity records for which work streams were created in the Omnichannel Administration app.
<Entity Record>	Select to view the components under the Entity record.
Work Stream Initialization - <Entity Record>	Do not modify.
Entity record - <Entity Record>	Do not modify.

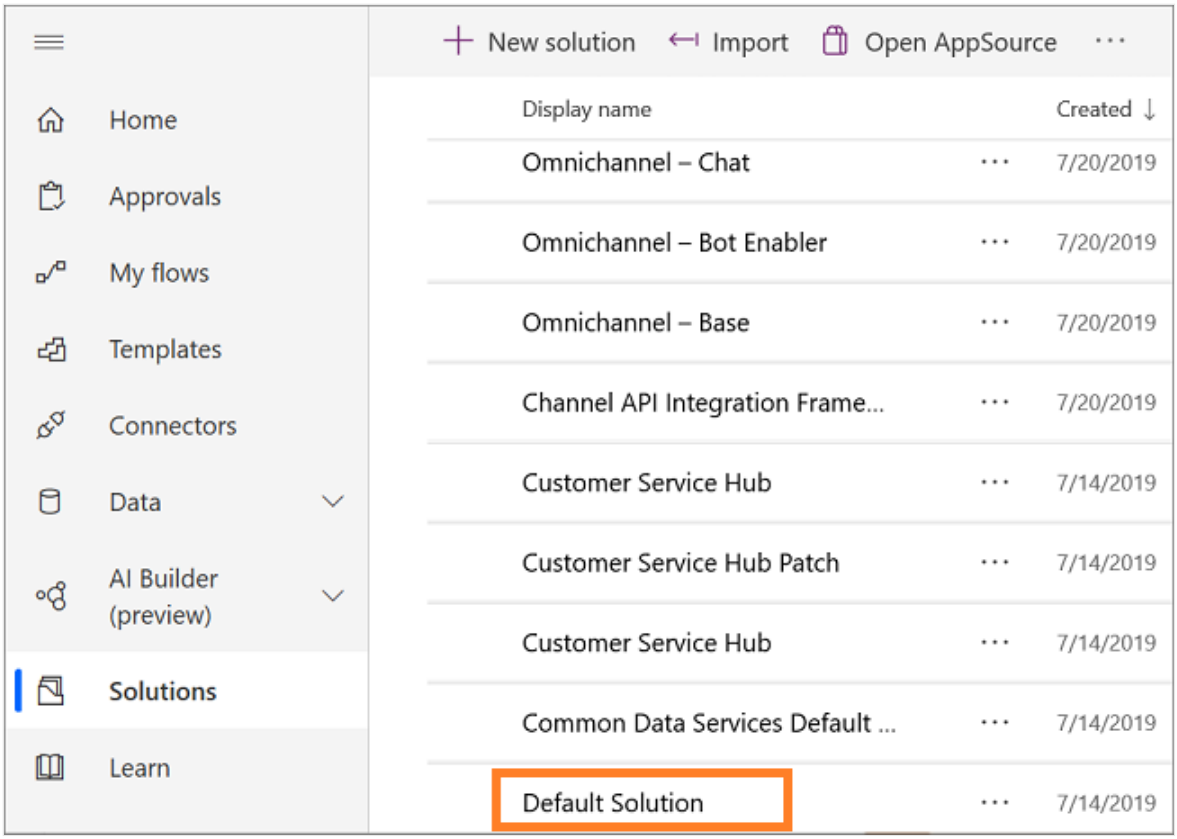
Component	Modification recommendation
Work Stream Selection for Routing (<Entity Record>)	Update the condition and work stream ID.
Invoke Omnichannel	Do not modify.

> ⚠ **Warning**
>
> We recommend you update only the **Work Stream Selection for Routing** component in **Entity Records Distribution Flow**. If you update any other component step in the flow, the entity routing might fail.

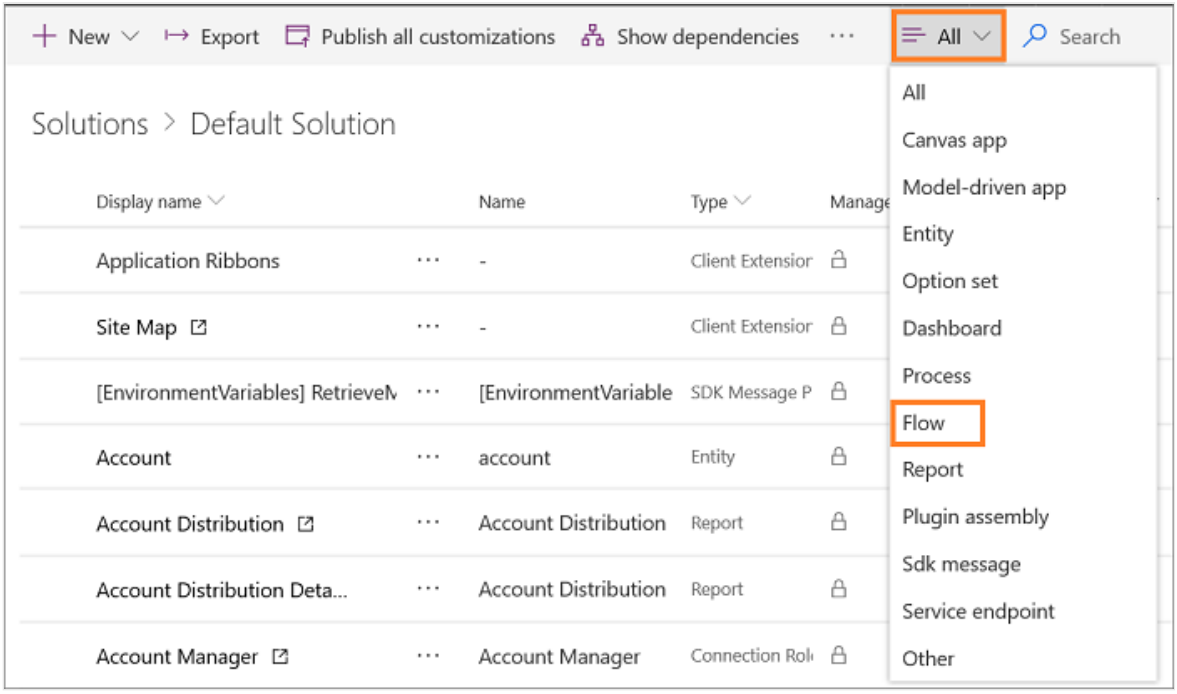
Update entity records work distribution flow

Navigate to the flow

1. Sign in to the Omnichannel Administration app.
2. Select **Work Streams** under **Work Distribution Management**.
3. Select the work stream for which you want to update the flow.
4. Select **Flow** menu in the command bar, and then select **See your flows**. Power Automate opens in a new browser window.
5. Select **Solutions** in the sitemap, and then select **Default Solution** from the list.



6. Select the **All** button in the menu and select **Flow** to filter the flows.



7. Select **Entity Record Distribution Flow** from the list.

8. Select the **Edit** button from the command bar at the top. The flow appears in a new tab.

Authenticate

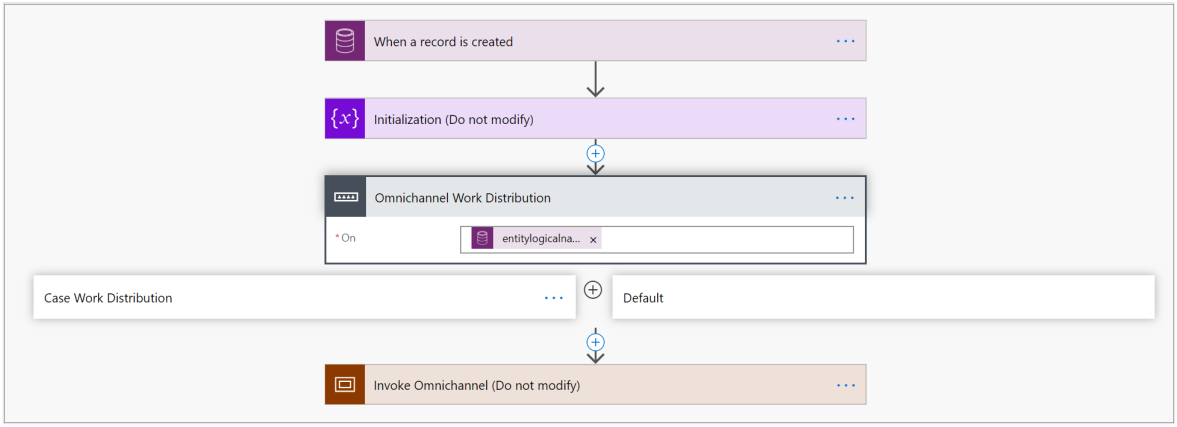
9. Select the flow component that shows the warning icon. Select an existing connection to resolve the warning. The flow component uses the current user credentials and resolves the warning.

Update the work stream ID

10. Select the **Omnichannel Work Distribution** section.

11. Select **<Entity Record> Distribution**. For example, **Case Work Distribution**.

12. Select the **Work Stream Selection for Routing** section.



13. Remove the **Select Default Work Stream - <Entity Record>** section by selecting the ellipses, and then by selecting **Delete**.

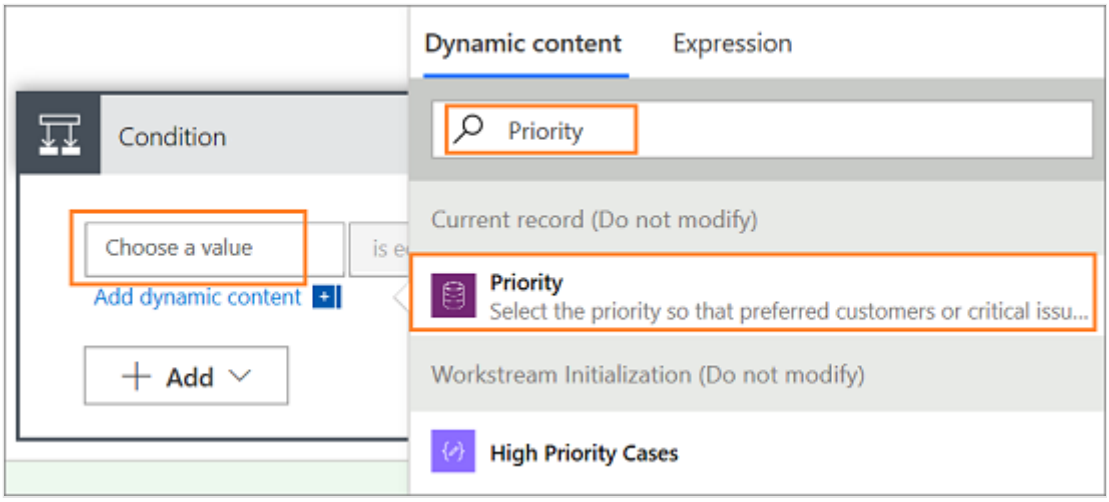
    For example, **Select Default Work Stream - Case**

    Remove the default work stream so you can update the work stream with the one you created earlier.

14. Select **Add an action** in the **Work Stream Selection for routing entity- (<Entity Record>)** section.

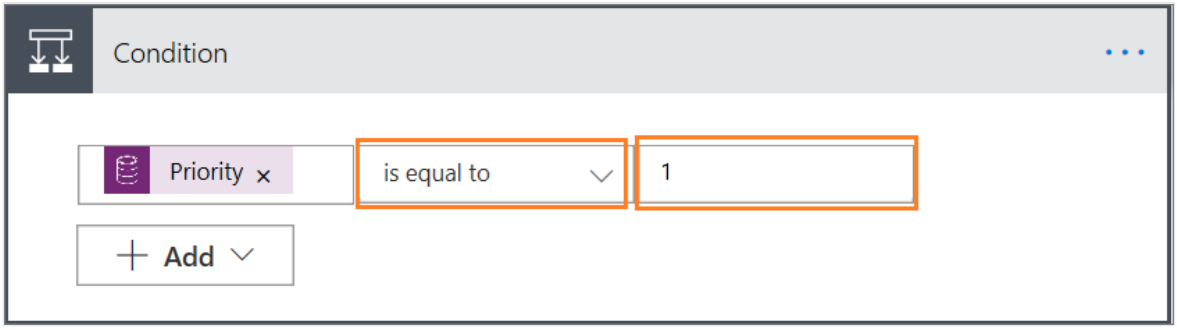
15. Select **Conditions** under the **Actions** tab.

16. Select the **Choose a value** box to add a rule. A flyout control appears. Type in the search box to look up the attributes of the Case record that is being routed. For example, **Priority**. The rule appears in the list, and when you select the rule, it is added to the field.

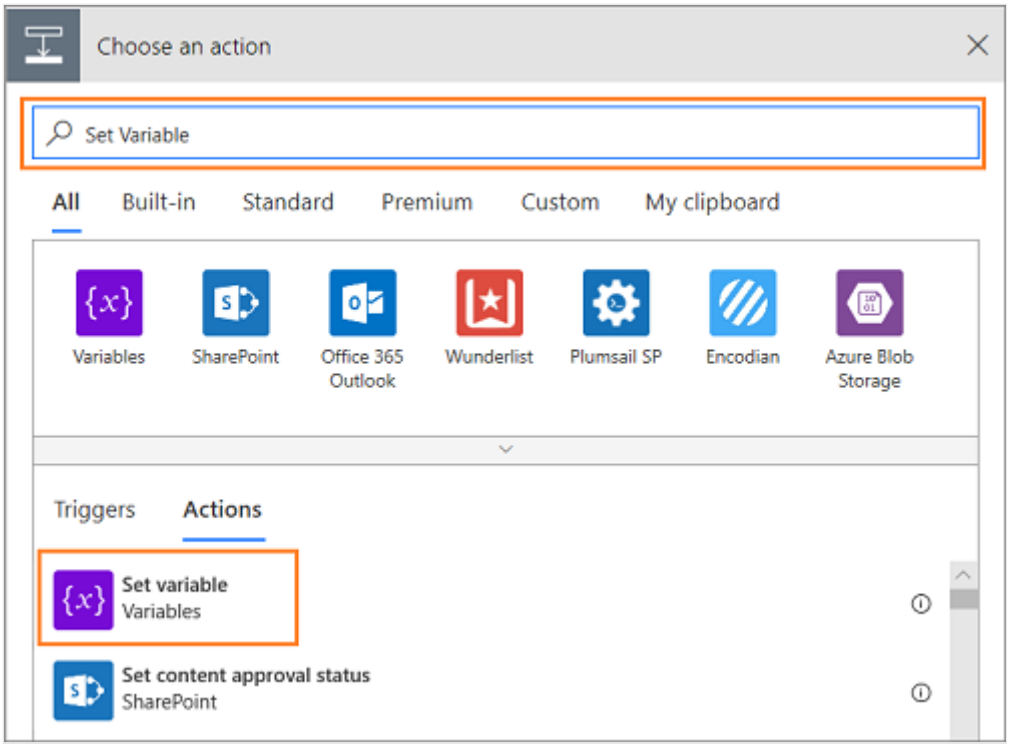


17. Select a condition from the list. For example, **is equal to**.

18. Type the rule value in the field. For example, **1**.



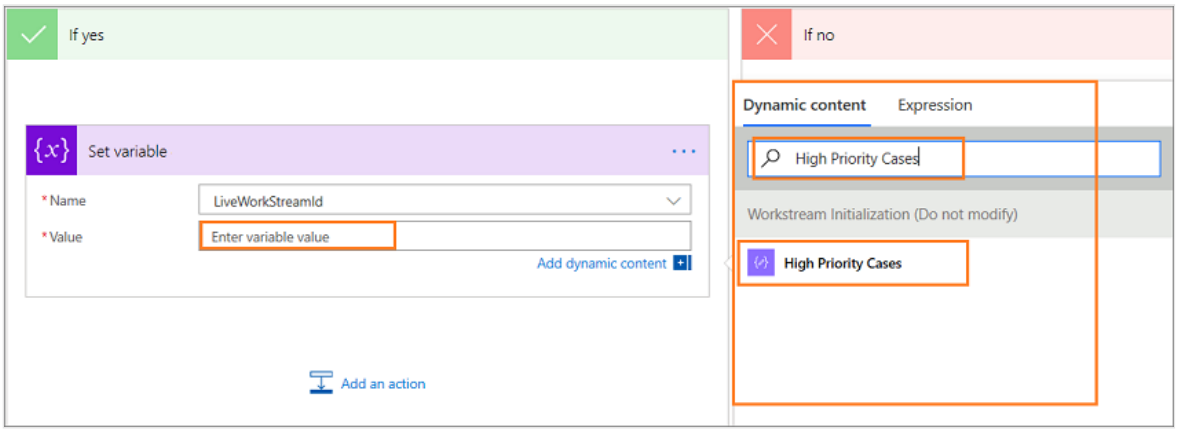
19. Select **Add an action** button under the **If yes** section. The **Choose an action** component appears. Now, type **Set Variable** in the **Search connectors and actions** box and the action appears in the list. Select it and the **Set Variable** action appears.



20. Select the **LiveWorkStreamId** from the Name drop-down list.

21. Select the **Value** field search box to add a variable. A flyout control appears. Type the name of the work stream that you created in the search box. For example, **High Priority Cases** is one of the case work stream that you created to route high priority cases. The value appears in the list, and when you select the value, it is added to the field.

> **Note**
>
> If you update the name of the work stream in Omnichannel Administration app, then you must perform step 21. Otherwise, the cases won't be automatically distributed to the agents.



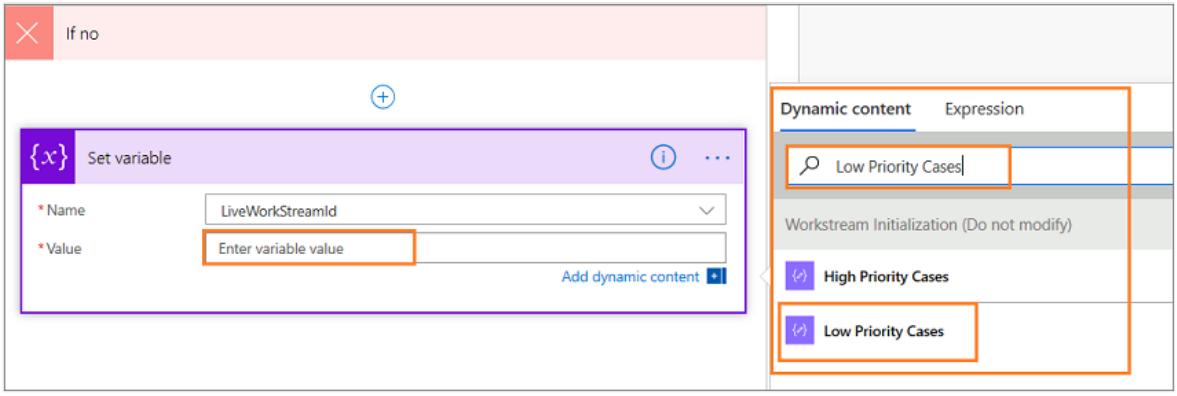
22. Select **Add an action** button under the **If no** section. The **Choose an action** component appears. Now, type **Set Variable** in the **Search connectors and actions**

box and the action appears in the list. Select it and the **Set Variable** action appears.

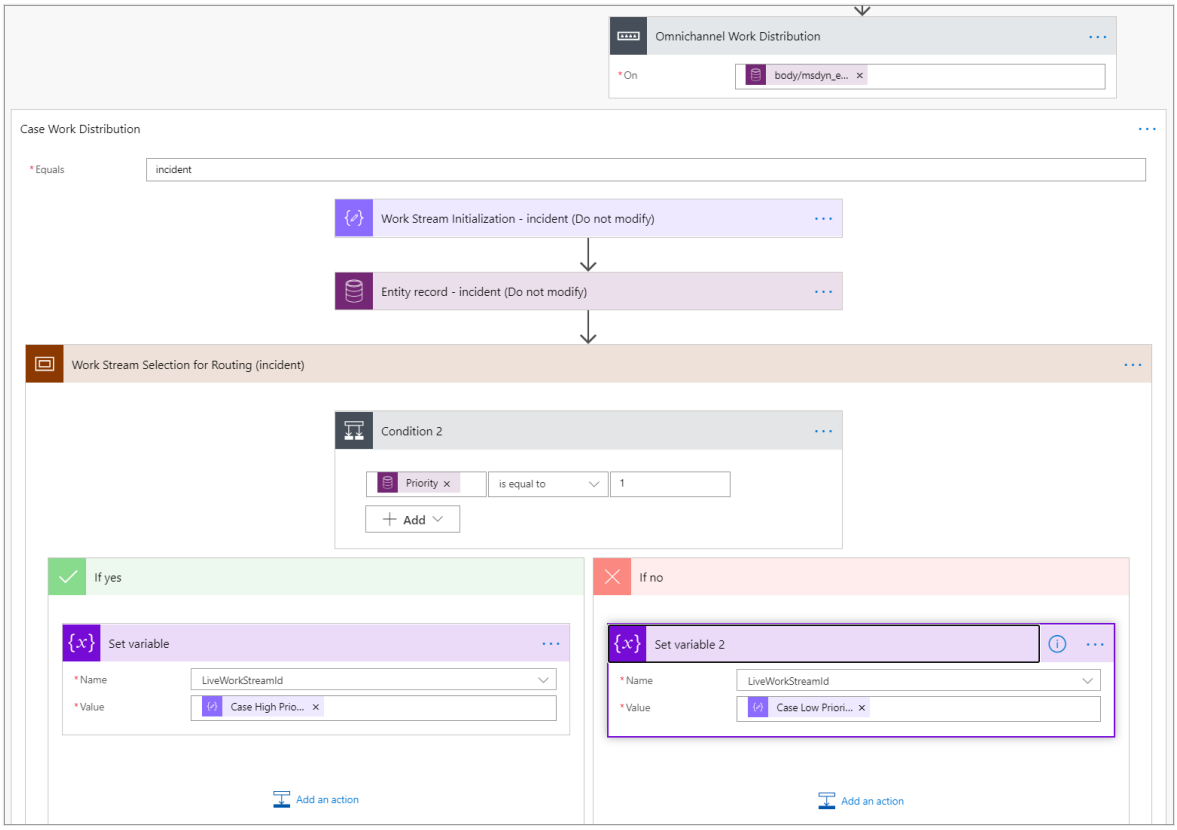
23. Select the **LiveWorkStreamId** from the Name drop-down list.

24. Select the **Value** field search box to add a variable. A flyout control appears. Type the name of the work stream you created in the search box. For example, **Low Priority Cases** is one of the case work stream that you created to route low priority cases. The value appears in the list, and when you select the value, it is added to the field.

> **Note**
>
> - If you update the name of the work stream in Omnichannel Administration app, then you must perform step 24. Otherwise, the cases won't be automatically distributed to the agents.
> - Adding multiple work streams in the conditions are optional. If your business process requires multiple work stream conditions, you can create it.



25. Select **Save** to save **Entity Record Distribution Flow**.



Now, you've defined **Entity Record Distribution Flow** such that any case whose priority is 1 (high) is distributed using high priority work stream, and other cases will be distributed using low priority work stream. Similarly, you can extend the conditions such that the Flow supports your business scenario requirements.

> **Important**
>
> Whenever you want to update the entity record work stream ensure that **Entity Records Distribution Flow** is closed. Assume, you've made certain updates to the Flow. Now, while the Flow is still in the open in the browser, you go to Omnichannel Administration app and update the work stream. In this case, after you save the work stream, the Flow will be reset to its earlier state and you will loose the changes you did to the Flow.

See also

Entity records routing
Understand and create workstreams
Create workstreams for entity record routing

Route records in Omnichannel Administration app

Article • 06/15/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Important

- Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated and will be removed in July 2023**.
- We recommend that you upgrade to the latest version of Omnichannel for Customer Service and use unified routing. For more information, see **Overview of unified routing**. With the upgrade, you can also use the Customer Service admin center app. For more information, see **Customer Service admin center**.

Overview

In Omnichannel Administration, **Entity Records** channel helps you to automatically route cases and other records to agents based on the agent's skill, capacity, and presence. To learn more about skill-based routing, see Skill-based routing overview.

Automatic distribution of cases and other records

With routing for records, organizations can route cases and other records to omnichannel queues. The cases and other records routed to omnichannel queues are automatically distributed and assigned to best available agents based on their skill, capacity, and presence.

Routing and queues

Cases and other records can be routed to omnichannel queues with work items that originate from other channels such as Chat and SMS.

This allows organizations to tightly define the work profile that their agents are supposed to handle, and organizations can automate the work flow assignment across channels and assign the work items based on agents skill, capacity, and presence.

Configure records channel

To setup the **Entity Record** channel for cases, follow the steps:

Step	Description
Step 1: Create queues and add agents	Define queues for your organization and add agents (users) to the queues.
Step 2: Enable entity for queues	Enable the entity for queues.
Step 3: Enable entity for routing channel	Create entity record configuration to enable an entity for routing.
Step 4: Create routing rules	Create routing rules to route cases to the appropriate queues.

Create queues and add agents

Create an omnichannel queue or use an existing omnichannel queue, and then add agents to these queues. To learn more, see Create a queue.

Enable entities for queues

Perform the steps mentioned in Enable entities for queues for unified routing.

Enable record for routing

Create record configuration to enable it for routing.

1. Sign in to the Omnichannel Administration app.
2. Select **Entity Records** under **Channels** in the sitemap.
3. Select **New** in the **Active Entities** page.

4. Specify the following in the **New Entity** page.

Tab	Field	Description	Value
Basic Details	Name	Specify a name for the record channel.	Case channel **Note:** This is an example value.
Basic Details	Entity	Select a value from the list.	Case (Incident)

5. Select **Save** to save the record channel. After you save, in the **Work distribution** section, a default work stream is automatically created to distribute these records.

> ⓘ **Note**
>
> When you create a record channel configuration, a default work stream will be created to distribute these records. You can edit the default work stream or create more work streams as per your business scenarios. To learn more, see **Create work stream for record routing**.

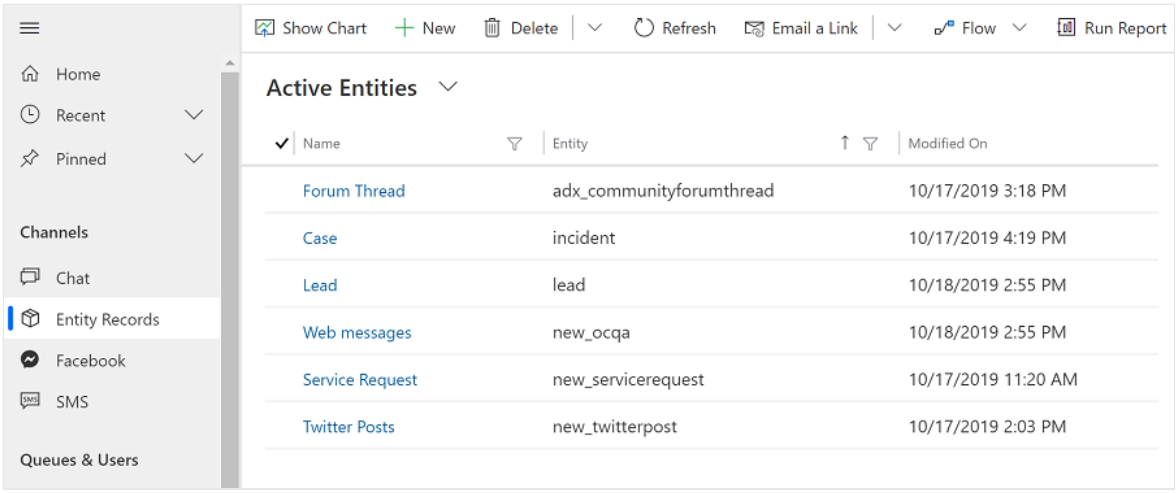
Create routing rules

After creating a record configuration, and enabling the record for routing, you can define routing rules to route these records to appropriate queues.

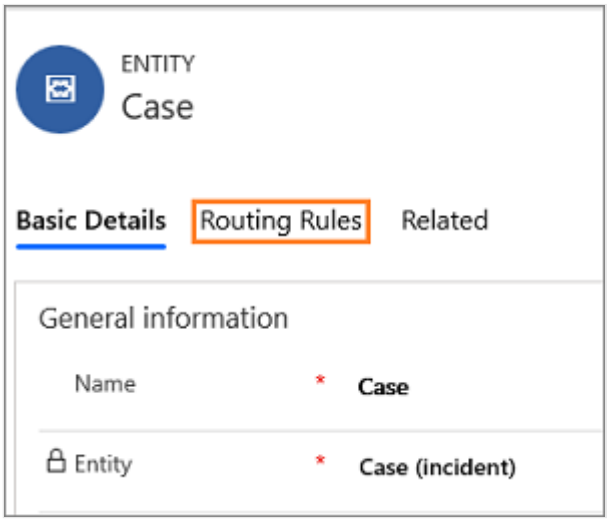
Routing rules for records consists of routing rule sets, which in turn contains rule items.

Let's see how to create routing rule set and rule items for records. In this procedure, we are adding it for case record as example.

1. Sign in to the Omnichannel Administration app.
2. Select **Entity Records** under **Channels** in the sitemap.
3. Select a records channel that you created for routing the records from the **Active Entities** view.



4. Select the **Routing Rules** tab in the entity records channel.



Create routing rule set

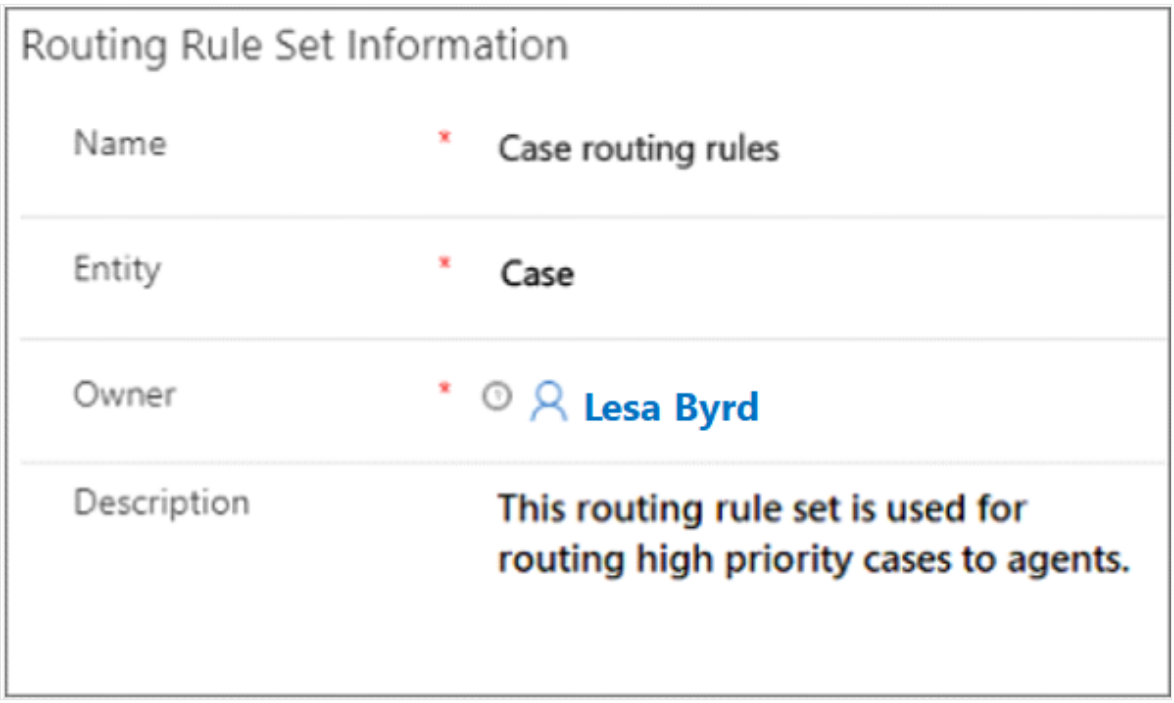
Routing rule set is a collection of rule items, and you can have multiple routing rule sets defined for a record. However, only one routing rule set can be active at any point in time. The rules items in active routing rule set are used to route the records. To create a new routing rule set, follow steps 5-7.

> ⓘ **Note**
>
> You can't edit an active routing rule set. Therefore, if you're importing a solution that includes an active routing rule set into an organization where the rule set already exists with the same ID, the solution import will fail.

5. Select **New Routing Rule Set**.

6. Specify the following in the **New Routing Rule Set** page.

Tab	Field	Value	Description
General	Name	Case routing rules	Specify a name to the routing rule set.
General	Entity	Case	Select the entity for which you are creating the rule set.
General	Description	This routing rule set is used for routing high priority cases to agents.	Specify a description for you to identify the purpose of the routing rule set.

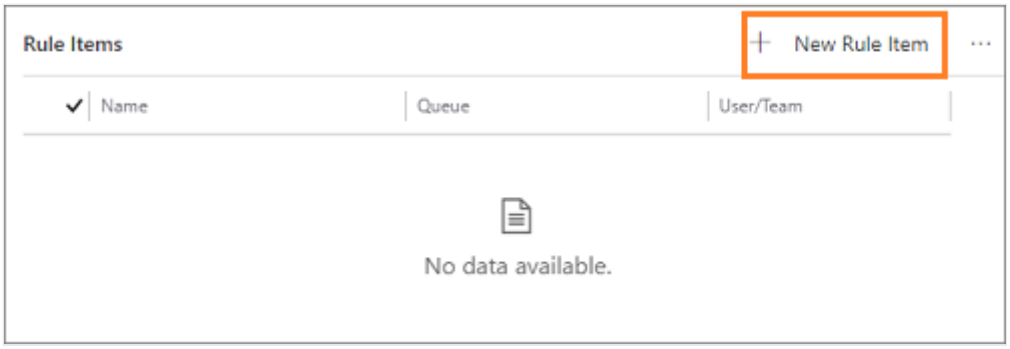


7. Select **Save** to save the rule set. Once you save the record, you can see the **Rule Items** section in the page.

Create rule item

You can define multiple routing rule items in a routing rule set. A rule item consists of a condition and destination to route the records. Let's see how to define the rule items. To create a new rule item, follow steps 8-13.

8. Select **New Rule Item** in the **Rule Items** section. A **New Rule Item** page appears.



9. Specify the following on the **New Rule Item** page.

Tab	Field	Value	Description
General	Name	Product - Credit card	Specify a name to the rule item.
General	Description	This rule item is used for routing credit card cases.	Specify a description for you to identify the purpose of the rule item.

10. Select **Add** in the **Rule Criteria** section, and then select **Add row**.

    a. Select a rule from the list for the first box. For example, **Subject**.

    b. Select a condition from the list. For example, **Contains**.

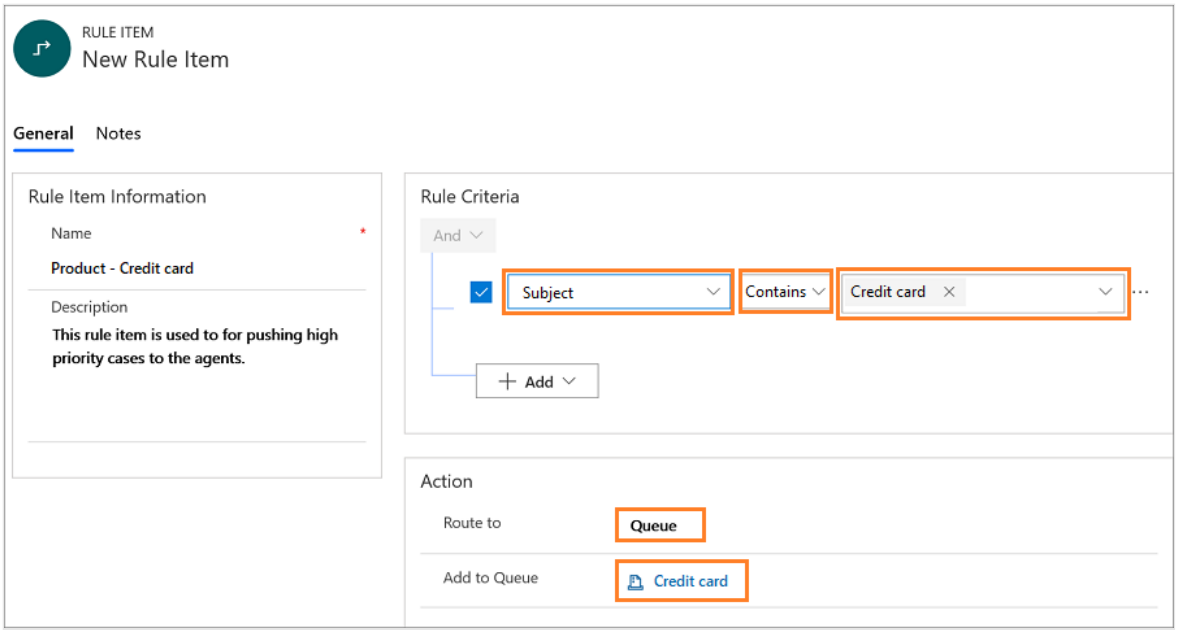
    c. Select a value for the rule from the list. For example, **Credit card**.

    > ⓘ Note
    >
    > You can define conditions for both primary entity attributes and related entity attributes.

11. Select **Queue** for the **Route to** field.

12. Select an omnichannel queue for the **Add to Queue** field.

    The steps 9 to 11 indicate if the **Subject** of a case is **Credit card**, then route the case to the selected omnichannel queue.



> [!NOTE]
> You must select an omnichannel queue for automatic work distribution in the **Add to Queue** field to automatically assign records to agents.

13. Select **Save** to save the rule item.

You've successfully created queues, enabled entity for routing, and created routing rule sets. Now, activate the routing rule set.

Upgrade path for preview users

If you are upgrading from preview release to the latest version, then earlier configured work streams will be obsolete. You need to create a new entity records channel and then redefine the work streams. To learn more, see Create workstream for entity record routing.

See also

Route trigger for entity records

Create workstream for entity record routing

Create multiple workstreams for entity records routing

Attach skills to conversations in Omnichannel Administration

Article • 06/15/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Important

- Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated and will be removed in July 2023**.
- We recommend that you upgrade to the latest version of Omnichannel for Customer Service and use unified routing. For more information, see **Overview of unified routing**. With the upgrade, you can also use the Customer Service admin center app. For more information, see **Customer Service admin center**.

Understand skill-based routing

When a customer initiates a conversation, the following happens:

- Based on the skill attachment rules, the system attaches the skills to the conversation.
- Based on the routing rules, the system routes the conversation to the appropriate queue.
- Now, the assignment system starts matching the agents' skills with those skills attached to the conversation. After finding a match as per the match criteria (exact or closest), the assignment engine assigns the conversation to the agent.

In the portal, when a customer fills in the prechat survey questions, the system receives them as context variables. The system attaches these variables to the incoming conversation as a skill. The assignment engine matches the skills of the agents. The skill is matched on exact or closest match. If the agent and conversation skills match, the assignment engine assigns the conversation to the agent.

For example:

Bert Hair, is a customer from Spain, who uses **Xbox** product. Bert goes to **www.contoso.com** portal to initiate a chat with the Contoso customer service. In the pre-chat survey question, Bert chooses **Xbox**. Because Bert's geolocation is Spain, the system attaches **Xbox** as the product and the **Spanish** language as the skill to the conversation. Then, the assignment engine assigns the conversation to an agent who matches the skill and language.

> **Note**
>
> The system attaches the skills to a conversation based on the skill attachment rules.

Match skills

When the skill attachment rules attach skills and proficiency levels, the assignment logic matches the required skill with the skills of the agent. The system assigns the conversation to an agent based on the skill criteria that is chosen.

Admins can achieve the skill matching based on the business requirements:

- Exact skill matching
- Closest or nearest skill matching

Exact skill matching

In exact skill matching, the assignment logic searches for an agent with the required skills and proficiency and lists them in the order of highest available capacity by default. The default order can be set to round robin by the administrator.

If no agent is available with all the required skills and corresponding or higher proficiency, then the conversation remains unassigned in the queue.

Exact match will filter all matching agents whose proficiency is greater than or equal to the required proficiency.

The following table describes how exact skill matching works for a single or multiple-skill scenario.

Skill scenario	Skill & proficiency criteria	Description
Single	Xbox = 4	The system searches for all agents with **Xbox** greater than or equal to **4**.
Multiple	Xbox = 4 Spanish = 5	The system searches for all agents with **Xbox** skill rating greater than or equal to 4 and **Spanish** skill rating greater than or equal to 5.

Closest skill matching

If no agent is available with any of the required skills, then the conversation might be assigned to an agent without the required skills.

The closest skill match will order all agents based on their closeness to the required skill and proficiency. For example, if the required skills are four, then agents with four skills will be put on top (exact qualified), then agent with five skills (overqualified), and then agent with three skills (under qualified). In this scenario where closest match is chosen as the skill matching algorithm at workstream level; if more than one agent with same skill score are there; the system won't order them by round robin or highest capacity. The system will continue to assign all the incoming work items to the same agent until other constraints like capacity and presence are met.

> ⓘ **Note**
>
> If you don't intend to use skills based routing model, choose **None** in the **Default skill matching algorithm** option in the workstream settings.

The following table describes how exact skill matching works for a single- or multiple-skill scenario.

Skill scenario	Skill & proficiency	Description

Skill scenario	Skill & proficiency	Description
Single	Xbox = 4	• Agents are first ordered by exact qualified match (Xbox equals 4), followed by overqualified match (Xbox is greater than 4), and then underqualified match (Xbox is less than 4) • If none of the criteria are met, then the work item might be assigned to an agent who doesn't have the Xbox skill.
Multiple	Xbox = 4 Spanish = 5	• Agents are first ordered by exact qualified (Xbox equals 4, Spanish equals 5), then overqualified (Xbox is greater than 4, Spanish is greater than 5) and then underqualified (Xbox is less than 4, Spanish is less than 5). • If none of the criteria are met, then the work item might be assigned to an agent who doesn't have the Xbox and Spanish skills.

> ⓘ **Note**
>
> The system provides a score for the agents against each skill based on the scenarios mentioned and rating model. The system calculates the normalised score of the agent by considering the skills and then, based on the score, assigns the conversation to the agents.

Prerequisites

To attach skills, you need a workstream record. You can either create or use an existing workstream configuration.

Create rules to attach a skill in Omnichannel Administration

1. Sign in to the **Omnichannel Administration** app.
2. Select **Work Streams** under **Work Distribution Management**.
3. Select a workstream from the list.
4. Select the **Skill Attachment Rules** tab.

5. Select a skill-matching option for the **Matching Logic** field. You can select one of the following:

   - Exact skill matching
   - Closest skill matching

   To learn more, see Match skills.

6. Select **Add** to create a new skill rule. The **SKILL ATTACHMENT RULE** page opens.

7. Specify the following in the **New Skill Attachment Rule** page.

Field	Description	Value
Name	Provide a name for the skill rule.	Xbox product and Spain location
Description	Describe the skill rule.	This is a skill-matching rule for the Xbox product and Spain location.

8. Set up the conditions. Select an **Entity**, **Related Attribute**, **Attribute**, **Operator**, and **Value**. For an entity, you can define rules based on related level 1 attributes.

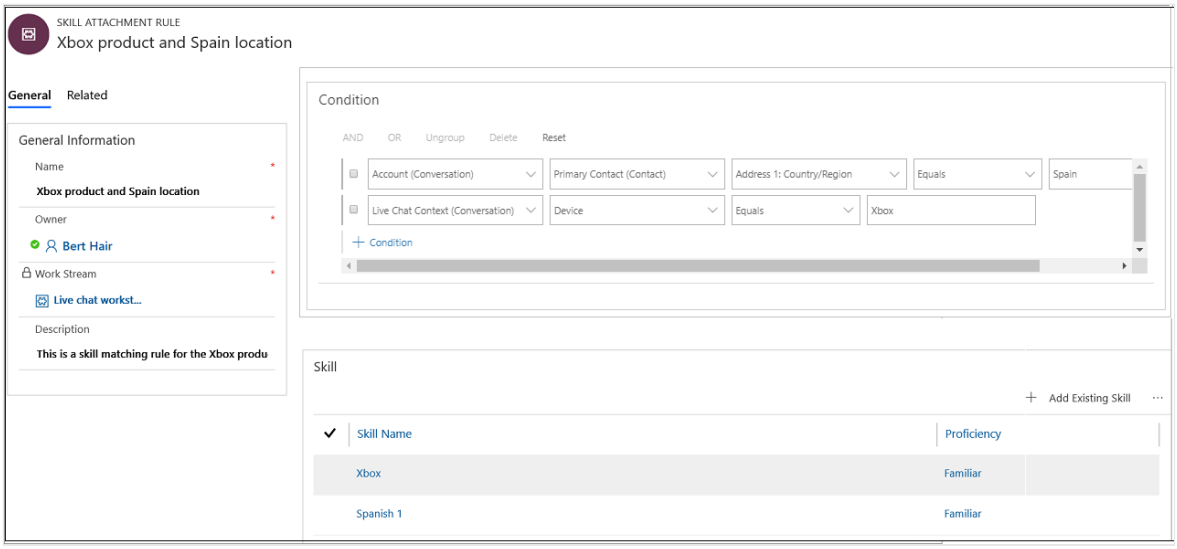
   An example is as follows.

Entity	Related Attribute	Attribute	Operator	Value
Account (Conversation)	Primary contact (Contact)	Address 1: Country/Region	Equals	Spain

9. Select **Save** to save the record. After you save, the **Skill** section appears.

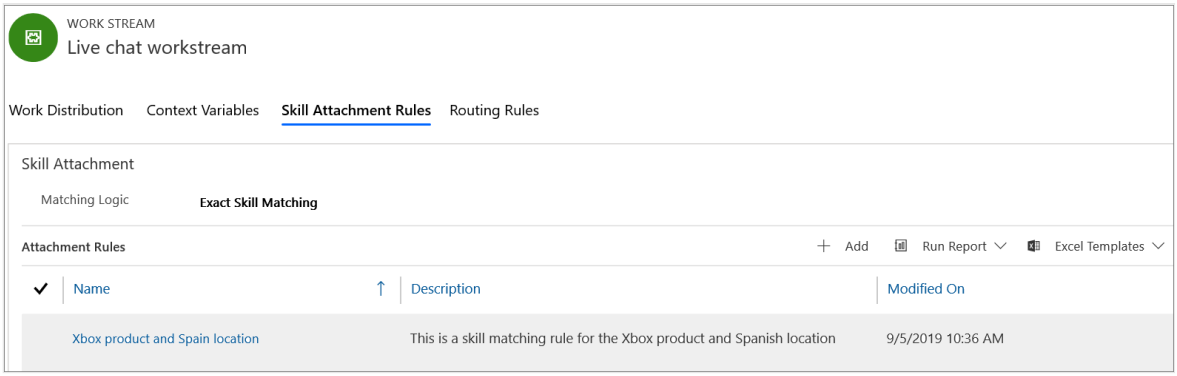
10. Select **Add Existing Skill**. The **Quick Create: Attach Skill** pane appears.

11. Select a skill from the lookup menu, and select a proficiency level from the list, and then select **Save and Close** to save and add the skill to the grid.



If the condition (criteria) matches, then the omnichannel system attaches the skill.

12. Select **Save**. After you save, the rule appears in the **Attachment Rules** section of the workstream.



See also

Overview of skill-based routing
Allow agents to update skills
Set up skills and assign agents

Omnichannel for Customer Service for developers

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Live chat widget SDK

Omnichannel for Customer Service live chat widget SDK provides methods that lets you do the following.

- Set, retrieve, and remove custom context provider for a live chat session.
- Open an existing chat or start a new one.
- Set, retrieve, and remove authentication-token providers for a live chat session.

Start a chat
Live chat SDK reference

Start proactive chat

Anticipating areas where customers need help and then engaging them through chat when they have been browsing your website for some time helps improve customer experience. Omnichannel for Customer Service allows you to offer proactive chat request to your customers when you think they can use some help.

Start a chat proactively

Send custom context

When a customer starts a chat, you can pass custom context to Omnichannel for Customer Service.

Send custom context

Display custom context

Learn how you can display the context variables in the Conversation Summary control for a conversation on the agent user interface.

Display custom context

Send authentication token

Learn how you can pass an authentication token to Omnichannel for Customer Service to authenticate a customer when they start a chat.

Send authentication token

Enable a bot to escalate and end conversation

Omnichannel for Customer Service allows you to route a conversation to a human agent when you think human intervention is required to successfully help the customer.

Enable a bot to escalate and end conversation

Close conversations automatically

Learn how you can automatically close a conversation using Web API.

Configure automatic closure of conversations

runMacro API

The `runMacro` API allows you to execute a macro whose name was passed as a parameter in the API call.

runMacro method

Build a smart assist bot

Read how you can build a smart assist bot to help agents resolve customer queries faster and more effectively.

Build a smart assist bot

Enable bot context

Enable your Azure bot to understand context while authoring a bot flow.

Enable bot context

Bring your own custom messaging channel

Read how you can implement a connector to integrate custom messaging channels using Direct Line Bot.

Integrate your own custom channel: Direct Line

See also

Introduction to Omnichannel for Customer Service
Omnichannel for Customer Service for administrators
Omnichannel for Customer Service for system customizers
Omnichannel for Customer Service for agents
Dynamics 365 Channel Integration Framework guide
Live chat SDK reference

Extend Omnichannel for Customer Service

Article • 02/18/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Dynamics 365 supports several scenarios to extend Omnichannel for Customer Service:

Telephony: You can integrate a third-party telephony system. For example, in a contact center, you can bring the softphone provider of your choice directly into the agent experience. This telephony integration ensures that incoming and outgoing voice calls are handled in a single agent experience, and that all necessary data is passed between the telephony system and Dynamics 365.

Additional digital channels: Beyond the digital channels such as web chat and Facebook Messenger that are provided out of the box with the Digital Messaging Add-on, you might need other custom channels. These might include channels that your organization has created for use internally.

Custom experiences: Some organizations might need highly customized experiences from a user perspective. For example, an organization that wants to create a highly customized app that embeds the messaging capabilities of Omnichannel for Customer Service might need to go beyond the standard approach.

The following table shows the SKUs that correspond with each experience.

Experience	Customer Service Enterprise	Chat for Dynamics 365 Add-on	Digital Messaging Add-on
Telephony (via third-party providers)	Yes	Yes	Yes
Web chat	-	Yes	Yes
Social channels, including Facebook Messenger, WeChat, Teams, SMS, and WhatsApp	-	-	Yes

Experience	Customer Service Enterprise	Chat for Dynamics 365 Add-on	Digital Messaging Add-on
Custom chat and messaging channels via Direct Line	-	-	Yes

> **Note**
>
> SMS and WhatsApp require additional third-party subscriptions. Refer to channel documentation for more information.

Embed other tools in Omnichannel for Customer Service

Telephony

Dynamics 365 Channel Integration Framework 2.0 provides APIs to integrate your telephony channel with multisession web experiences (Omnichannel for Dynamics 365 Customer Service). These APIs allow the telephony channel to show notifications for an incoming conversation with relevant information, start new sessions for conversations, and open application tabs as needed. More information: Dynamics 365 Channel Integration Framework 2.0

Other messaging channels

You can integrate your line-of-business (in-house), social, and other messaging channels with Omnichannel for Customer Service. This is primarily done through configuring a custom messaging channel via Direct Line. After integration, you can use unified routing to automatically assign work items (conversations) to agents on these custom channels.

Direct Line allows custom channels to be brought into Omnichannel for Customer Service by using the Microsoft Bot Framework. To bring in a custom channel, you can set up a Direct Line connection through the Azure Bot Service (which will incur Azure charges), and then bring that Direct Line bot into Omnichannel for Customer Service. More information: Configure a custom messaging channel

See also

Bring your own custom messaging channel: Direct Line bot

Connect a bot to Direct Line

Dynamics 365 Channel Integration Framework 2.0

Omnichannel for Customer Service entity reference

Article • 03/17/2023

When you install the Omnichannel for Customer Service solution, the following entities are added to your Dynamic 365 organization.

Entity name
incident
msdyn_actioninputparameter
msdyn_actionoutputparameter
msdyn_agentcapacityprofileunit
msdyn_agentscript
msdyn_agentscriptstep
msdyn_agentstatus
msdyn_agentstatushistory
msdyn_analytics
msdyn_assignmentconfiguration
msdyn_assignmentconfigurationstep
msdyn_authenticationsettings
msdyn_bookableresourcecapacityprofile
msdyn_cannedmessage
msdyn_capacityprofile
msdyn_cdsentityengagementctx
msdyn_channelcapability
msdyn_chatansweroption
msdyn_chatquestionnaireresponse
msdyn_chatquestionnaireresponseitem

Entity name
msdyn_chatwidgetlanguage
msdyn_consoleapplicationsessiontemplate
msdyn_conversationaction
msdyn_conversationactionlocale
msdyn_conversationmessageblock
msdyn_conversationsuggestionrequestpayload
msdyn_copilotinteraction
msdyn_copilotinteractiondata
msdyn_copilottranscript
msdyn_copilottranscriptdata
msdyn_customengagementctx
msdyn_decisioncontract
msdyn_decisionruleset
msdyn_entityconfig
msdyn_entityroutingconfiguration
msdyn_facebookengagementctx
msdyn_lineengagementctx
msdyn_livechatconfig
msdyn_livechatengagementctx
msdyn_livechatwidgetlocation
msdyn_liveconversation
msdyn_liveworkstream
msdyn_liveworkstreamcapacityprofile
msdyn_localizedsurveyquestion
msdyn_maskingrule
msdyn_macroactiontemplate

Entity name
msdyn_macroconnector
msdyn_macrosession
msdyn_macrosolutionconfiguration
msdyn_oc_geolocationprovider
msdyn_ocapplepay
msdyn_ocbotchannelregistration
msdyn_ocbotchannelregistrationsecret
msdyn_occhannelconfiguration
msdyn_occhannelstateconfiguration
msdyn_occommunicationprovidersetting
msdyn_occommunicationprovidersettingentry
msdyn_occustommessagingchannel
msdyn_ocexternalcontext
msdyn_ocfbapplication
msdyn_ocfbpage
msdyn_ocgooglebusinessmessagesagentaccount
msdyn_ocgooglebusinessmessagespartneraccount
msdyn_oclanguage
msdyn_oclinechannelconfig
msdyn_ocliveworkitem
msdyn_ocliveworkitemcapacityprofile
msdyn_ocliveworkitemcharacteristic
msdyn_ocliveworkitemcontextitem
msdyn_ocliveworkitemparticipant
msdyn_ocliveworkitemsentiment
msdyn_ocliveworkstreamcontextvariable

Entity name
msdyn_oclocalizationdata
msdyn_ocoutboundconfiguration
msdyn_ocoutboundmessage
msdyn_ocphonenumber
msdyn_ocphonecallengagementctx
msdyn_ocprovisioningstate
msdyn_ocrecording
msdyn_ocrequest
msdyn_ocruleitem
msdyn_ocsentimentdailytopic
msdyn_ocsentimentdailytopickeyword
msdyn_ocsentimentdailytopictrending
msdyn_ocsession
msdyn_ocsessioncharacteristic
msdyn_ocsessionparticipantevent
msdyn_ocsessionsentiment
msdyn_ocsimltraining
msdyn_ocsitdimportconfig
msdyn_ocsitrainingdata
msdyn_ocskillidentmlmodel
msdyn_ocsmssettingsecret
msdyn_ocsystemmessage
msdyn_octag
msdyn_octeamschannelconfig
msdyn_ocvoice
msdyn_ocvoicechannellanguagesetting

Entity name
msdyn_ocvoicechannelsetting
msdyn_ocwechatchannelconfig
msdyn_ocwhatsappchannelaccount
msdyn_ocwhatsappchannelnumber
msdyn_omnichannelconfiguration
msdyn_omnichannelpersonalization
msdyn_omnichannelqueue
msdyn_omnichannelsyncconfig
msdyn_operatinghour
msdyn_overflowactionconfig
msdyn_paneconfiguration
msdyn_panetabconfiguration
msdyn_panetoolconfiguration
msdyn_parameterdefinition
msdyn_personalmessage
msdyn_personalsoundsetting
msdyn_personasecurityrolemapping
msdyn_preferredagent
msdyn_preferredagentcustomeridentity
msdyn_presence
msdyn_productivitypaneconfiguration
msdyn_provider
msdyn_questionsequence
msdyn_routingconfiguration
msdyn_routingconfigurationstep
msdyn_routingrequest

Entity name
msdyn_routingrulesetsetting
msdyn_rulesetdependencymapping
msdyn_scenario
msdyn_searchconfiguration
msdyn_sentimentanalysis
msdyn_sessionevent
msdyn_sessionparticipant
msdyn_skillattachmentruleitem
msdyn_skillattachmenttarget
msdyn_smsengagementctx
msdyn_smsnumber
msdyn_soundfile
msdyn_soundnotificationsetting
msdyn_surveyquestion
msdyn_systemuser_msdyn_omnichannelqueue
msdyn_teamsengagementctx
msdyn_transcript
msdyn_unifiedroutingdiagnostic
msdyn_unifiedroutingrun
msdyn_unifiedroutingsetuptracker
msdyn_usersetting
msdyn_visitorjourney
msdyn_wechatengagementctx
msdyn_whatsappengagementctx
queue
queueitem

Entity name
routingrule
socialprofile
systemuser

Attributes added for existing entities

When you install Omnichannel for Customer Service, you will see some attributes added for already existing entities.

SystemUser entity

Attribute name
`msdyn_capacity`

More information: <xref:"Microsoft.Dynamics.CRM.systemuser?text=SystemUser entity" />

Queue entity

Attribute name
`msdyn_isdefaultqueue`
`msdyn_priority`

More information: <xref:"Microsoft.Dynamics.CRM.queue?text=Queue entity" />

Deprecated entities

See Deprecated entities for the list of entities that are deprecated and no longer supported.

See also

Developer guide for Omnichannel for Customer Service

Deprecated entities

Article • 03/17/2023

The following entities have been deprecated. These entities will still be visible in the $metadata document but using it to access Microsoft Dataverse data is not supported.

- msdyn_ocliveworkitemparticipant
- msdyn_omnichannelqueue
- msdyn_entityconfig
- msdyn_localizedsurveyquestion
- msdyn_routingruleinstance
- msdyn_systemuser_msdyn_omnichannelqueue
- msdyn_liveconversation
- msdyn_actioninputparameter
- msdyn_actionoutputparameter
- msdyn_macroactiontemplate
- msdyn_macrosolutionconfiguration
- msdyn_macroconnector
- msdyn_parameterdefinition
- msdyn_productivitypaneconfiguration
- msdyn_agentscript
- msdyn_agentscriptstep

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

Incident Entity Reference

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Service request case associated with a contract.

Added by: Service Solution

Messages

Message	Web API Operation	SDK Assembly
ApplyRoutingRule	Microsoft.Dynamics.CRM.ApplyRoutingRule	ApplyRoutingRuleRequest
Assign	PATCH [*org URI*]/api/data/v9.0/incidents(*incidentid*) Update `ownerid` property.	AssignRequest
CalculateTotalTimeIncident	Microsoft.Dynamics.CRM.CalculateTotalTimeIncident	CalculateTotalTimeIncidentRequest
CloseIncident	Microsoft.Dynamics.CRM.CloseIncident	CloseIncidentRequest
CloseQuote	Microsoft.Dynamics.CRM.CloseQuote	CloseQuoteRequest
Create	POST [*org URI*]/api/data/v9.0/incidents See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/incidents(*incidentid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Merge	Merge Action	MergeRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
msdyn_GetCaseSuggestions		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
Retrieve	GET [*org URI*]/api/data/v9.0/incidents(*incidentid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/incidents See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
Rollup	Rollup Function	RollupRequest

Message	Web API Operation	SDK Assembly
SetState	PATCH [*org URI*]/api/data/v9.0/incidents(*incidentid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/incidents(*incidentid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	Incidents
DisplayCollectionName	Cases
DisplayName	Case
EntitySetName	incidents
IsBPFEntity	False
LogicalCollectionName	incidents
LogicalName	incident
OwnershipType	UserOwned
PrimaryIdAttribute	incidentid
PrimaryNameAttribute	title
SchemaName	Incident

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ActivitiesComplete
- ActualServiceUnits
- Adx_CreatedByIPAddress
- Adx_CreatedByUsername
- Adx_ModifiedByIPAddress
- Adx_ModifiedByUsername
- adx_publishtoweb
- adx_resolution
- adx_resolutiondate
- adx_stepstoreproduce
- BilledServiceUnits
- BlockedProfile
- CaseOriginCode
- CaseTypeCode
- CheckEmail
- ContractDetailId
- ContractId
- ContractServiceLevelCode

- CustomerContacted
- CustomerId
- CustomerIdType
- CustomerSatisfactionCode
- DecrementEntitlementTerm
- Description
- EmailAddress
- EntitlementId
- EntityImage
- ExistingCase
- FirstResponseByKPIId
- FirstResponseSent
- FirstResponseSLAStatus
- FollowupBy
- FollowUpTaskCreated
- ImportSequenceNumber
- IncidentId
- IncidentStageCode
- InfluenceScore
- IsDecrementing
- IsEscalated
- KbArticleId
- LastOnHoldTime
- MasterId
- MessageTypeCode
- msa_partnercontactid
- msa_partnerid
- msdyn_iotalert
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- ParentCaseId
- PrimaryContactId
- PriorityCode
- ProcessId
- ProductId
- ProductSerialNumber
- ResolveBy
- ResolveByKPIId
- ResolveBySLAStatus
- ResponseBy
- ResponsibleContactId
- RouteCase
- SentimentValue
- ServiceStage
- SeverityCode
- SLAId
- SocialProfileId
- StageId
- StateCode
- StatusCode

- SubjectId
- TicketNumber
- TimeZoneRuleVersionNumber
- Title
- TransactionCurrencyId
- TraversedPath
- UTCConversionTimeZoneCode

ActivitiesComplete

Property	Value
Description	This attribute is used for Sample Service Business Processes.
DisplayName	Activities Complete
IsValidForForm	True
IsValidForRead	True
LogicalName	activitiescomplete
RequiredLevel	None
Type	Boolean

ActivitiesComplete Options

Value	Label
1	Yes
0	No

DefaultValue: False

ActualServiceUnits

Property	Value
Description	Type the number of service units that were actually required to resolve the case.
DisplayName	Actual Service Units
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	actualserviceunits
MaxValue	1000000000
MinValue	0
RequiredLevel	None
Type	Integer

Adx_CreatedByIPAddress

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	
DisplayName	Created By IP Address
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	adx_createdbyipaddress
MaxLength	100
RequiredLevel	None
Type	String

Adx_CreatedByUsername

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	
DisplayName	Created By Username
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	adx_createdbyusername
MaxLength	100
RequiredLevel	None
Type	String

Adx_ModifiedByIPAddress

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	
DisplayName	Modified By IP Address

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	adx_modifiedbyipaddress
MaxLength	100
RequiredLevel	None
Type	String

Adx_ModifiedByUsername

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	
DisplayName	Modified By Username
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	adx_modifiedbyusername
MaxLength	100
RequiredLevel	None
Type	String

adx_publishtoweb

Added by: Dynamics 365 Portals - Customer Service Solution

Property	Value
Description	If set to Yes, the case will be visible and searchable on portals connected to this organization.
DisplayName	Publish to Web
IsValidForForm	True
IsValidForRead	True
LogicalName	adx_publishtoweb
RequiredLevel	None
Type	Boolean

adx_publishtoweb Options

Value	Label
1	Yes
0	No

DefaultValue: False

adx_resolution

Added by: Dynamics 365 Portals - Customer Service Solution

Property	Value
Description	
DisplayName	Resolution
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	adx_resolution
MaxLength	10000
RequiredLevel	None
Type	Memo

adx_resolutiondate

Added by: Dynamics 365 Portals - Customer Service Solution

Property	Value
DateTimeBehavior	UserLocal
Description	
DisplayName	Resolution Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	adx_resolutiondate
RequiredLevel	None
Type	DateTime

adx_stepstoreproduce

Added by: Dynamics 365 Portals - Customer Service Solution

Property	Value
Description	
DisplayName	Steps to Reproduce
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	adx_stepstoreproduce
MaxLength	10000
RequiredLevel	Recommended
Type	Memo

BilledServiceUnits

Property	Value
Description	Type the number of service units that were billed to the customer for the case.
DisplayName	Billed Service Units
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	billedserviceunits
MaxValue	1000000000
MinValue	0
RequiredLevel	None
Type	Integer

BlockedProfile

Property	Value
Description	Details whether the profile is blocked or not.
DisplayName	Blocked Profile
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	blockedprofile

Property	Value
RequiredLevel	None
Type	Boolean

BlockedProfile Options

Value	Label
1	Yes
0	No

DefaultValue: False

CaseOriginCode

Property	Value
Description	Select how contact about the case was originated, such as email, phone, or web, for use in reporting and analysis.
DisplayName	Origin
IsValidForForm	True
IsValidForRead	True
LogicalName	caseorigincode
RequiredLevel	None
Type	Picklist

CaseOriginCode Options

Value	Label
1	Phone
2	Email
3	Web
2483	Facebook
3986	Twitter
700610000	IoT

CaseTypeCode

Property	Value
Description	Select the type of case to identify the incident for use in case routing and analysis.
DisplayName	Case Type

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	casetypecode
RequiredLevel	None
Type	Picklist

CaseTypeCode Options

Value	Label
1	Question
2	Problem
3	Request

CheckEmail

Property	Value
Description	This attribute is used for Sample Service Business Processes.
DisplayName	Check Email
IsValidForForm	True
IsValidForRead	True
LogicalName	checkemail
RequiredLevel	None
Type	Boolean

CheckEmail Options

Value	Label
1	Yes
0	No

DefaultValue: False

ContractDetailId

Property	Value
Description	Choose the contract line that the case should be logged under to make sure the customer is charged correctly.
DisplayName	Contract Line
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	contractdetailid
RequiredLevel	None
Targets	contractdetail
Type	Lookup

ContractId

Property	Value
Description	Choose the service contract that the case should be logged under to make sure the customer is eligible for support services.
DisplayName	Contract
IsValidForForm	True
IsValidForRead	True
LogicalName	contractid
RequiredLevel	None
Targets	contract
Type	Lookup

ContractServiceLevelCode

Property	Value
Description	Select the service level for the case to make sure the case is handled correctly.
DisplayName	Service Level
IsValidForForm	True
IsValidForRead	True
LogicalName	contractservicelevelcode
RequiredLevel	None
Type	Picklist

ContractServiceLevelCode Options

Value	Label
1	Gold
2	Silver
3	Bronze

CustomerContacted

Property	Value
Description	Tells whether customer service representative has contacted the customer or not.
DisplayName	Customer Contacted
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	customercontacted
RequiredLevel	None
Type	Boolean

CustomerContacted Options

Value	Label
1	Yes
0	No

DefaultValue: False

CustomerId

Property	Value
Description	Select the customer account or contact to provide a quick link to additional customer details, such as account information, activities, and opportunities.
DisplayName	Customer
IsValidForForm	True
IsValidForRead	True
LogicalName	customerid
RequiredLevel	SystemRequired
Targets	account,contact
Type	Customer

CustomerIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	Customer Type

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	customeridtype
RequiredLevel	ApplicationRequired
Type	EntityName

CustomerSatisfactionCode

Property	Value
Description	Select the customer's level of satisfaction with the handling and resolution of the case.
DisplayName	Satisfaction
IsValidForForm	True
IsValidForRead	True
LogicalName	customersatisfactioncode
RequiredLevel	None
Type	Picklist

CustomerSatisfactionCode Options

Value	Label
1	Very Dissatisfied
2	Dissatisfied
3	Neutral
4	Satisfied
5	Very Satisfied

DecrementEntitlementTerm

Property	Value
Description	Shows whether terms of the associated entitlement should be decremented or not.
DisplayName	Decrement Entitlement Terms
IsValidForForm	True
IsValidForRead	True
LogicalName	decremententitlementterm
RequiredLevel	None
Type	Boolean

DecrementEntitlementTerm Options

Value	Label
1	Yes
0	No

DefaultValue: True

Description

Property	Value
Description	Type additional information to describe the case to assist the service team in reaching a resolution.
DisplayName	Description
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	description
MaxLength	2000
RequiredLevel	None
Type	Memo

EmailAddress

Property	Value
Description	The primary email address for the entity.
DisplayName	Email Address
FormatName	Email
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	emailaddress
MaxLength	100
RequiredLevel	None
Type	String

EntitlementId

Property	Value

Property	Value
Description	Choose the entitlement that is applicable for the case.
DisplayName	Entitlement
IsValidForForm	True
IsValidForRead	True
LogicalName	entitlementid
RequiredLevel	None
Targets	entitlement
Type	Lookup

EntityImage

Added by: Active Solution Solution

Property	Value
Description	The default image for the entity.
DisplayName	Entity Image
IsPrimaryImage	True
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimage
MaxHeight	144
MaxWidth	144
RequiredLevel	None
Type	Image

ExistingCase

Property	Value
Description	Select an existing case for the customer that has been populated. For internal use only.
DisplayName	Existing Case
IsValidForForm	False
IsValidForRead	True
LogicalName	existingcase
RequiredLevel	None
Targets	incident
Type	Lookup

FirstResponseByKPIId

Property	Value
Description	For internal use only.
DisplayName	First Response By KPI
IsValidForForm	True
IsValidForRead	True
LogicalName	firstresponsebykpiid
RequiredLevel	None
Targets	slakpiinstance
Type	Lookup

FirstResponseSent

Property	Value
Description	Indicates if the first response has been sent.
DisplayName	First Response Sent
IsValidForForm	True
IsValidForRead	True
LogicalName	firstresponsesent
RequiredLevel	None
Type	Boolean

FirstResponseSent Options

Value	Label
1	Yes
0	No

DefaultValue: False

FirstResponseSLAStatus

Property	Value
Description	Shows the status of the initial response time for the case according to the terms of the SLA.
DisplayName	First Response SLA Status
IsValidForForm	True
IsValidForRead	True
LogicalName	firstresponseslastatus

Property	Value
RequiredLevel	None
Type	Picklist

FirstResponseSLAStatus Options

Value	Label
1	In Progress
2	Nearing Noncompliance
3	Succeeded
4	Noncompliant

FollowupBy

Property	Value
DateTimeBehavior	UserLocal
Description	Enter the date by which a customer service representative has to follow up with the customer on this case.
DisplayName	Follow Up By
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	followupby
RequiredLevel	None
Type	DateTime

FollowUpTaskCreated

Property	Value
Description	This attribute is used for Sample Service Business Processes.
DisplayName	Follow up Task Created
IsValidForForm	True
IsValidForRead	True
LogicalName	followuptaskcreated
RequiredLevel	None
Type	Boolean

FollowUpTaskCreated Options

Value	Label
1	Yes
0	No

DefaultValue: False

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IncidentId

Property	Value
Description	Unique identifier of the case.
DisplayName	Case
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	incidentid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

IncidentStageCode

Property	Value
Description	Select the current stage of the service process for the case to assist service team members when they review or transfer a case.

Property	Value
DisplayName	Case Stage
IsValidForForm	True
IsValidForRead	True
LogicalName	incidentstagecode
RequiredLevel	None
Type	Picklist

IncidentStageCode Options

Value	Label
1	Default Value

InfluenceScore

Property	Value
Description	Will contain the Influencer score coming from NetBreeze.
DisplayName	Influence Score
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	influencescore
MaxValue	1000000000
MinValue	0
Precision	2
RequiredLevel	None
Type	Double

IsDecrementing

Property	Value
Description	For system use only.
DisplayName	Decrementing
IsValidForForm	True
IsValidForRead	True
LogicalName	isdecrementing
RequiredLevel	None

Property	Value
Type	Boolean

IsDecrementing Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsEscalated

Property	Value
Description	Indicates if the case has been escalated.
DisplayName	Is Escalated
IsValidForForm	True
IsValidForRead	True
LogicalName	isescalated
RequiredLevel	None
Type	Boolean

IsEscalated Options

Value	Label
1	Yes
0	No

DefaultValue: False

KbArticleId

Property	Value
Description	Choose the article that contains additional information or a resolution for the case, for reference during research or follow up with the customer.
DisplayName	Knowledge Base Article
IsValidForForm	True
IsValidForRead	True
LogicalName	kbarticleid
RequiredLevel	None

Property	Value
Targets	kbarticle
Type	Lookup

LastOnHoldTime

Property	Value
DateTimeBehavior	UserLocal
Description	Contains the date time stamp of the last on hold time.
DisplayName	Last On Hold Time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	lastonholdtime
RequiredLevel	None
Type	DateTime

MasterId

Property	Value
Description	Choose the primary case the current case was merged into.
DisplayName	Master Case
IsValidForForm	False
IsValidForRead	True
LogicalName	masterid
RequiredLevel	None
Targets	incident
Type	Lookup

MessageTypeCode

Property	Value
Description	Shows whether the post originated as a public or private message.
DisplayName	Received As
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	messagetypecode
RequiredLevel	None
Type	Picklist

MessageTypeCode Options

Value	Label
0	Public Message
1	Private Message

msa_partnercontactid

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	Allows a partner contact to be assigned to a specific case.
DisplayName	Partner Contact
IsValidForForm	True
IsValidForRead	True
LogicalName	msa_partnercontactid
RequiredLevel	None
Targets	contact
Type	Lookup

msa_partnerid

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	Creates a Relationship between a Partner (account) and a case for indirect service arrangements.
DisplayName	Partner
IsValidForForm	True
IsValidForRead	True
LogicalName	msa_partnerid
RequiredLevel	None
Targets	account
Type	Lookup

msdyn_iotalert

Added by: Connected Customer Service for Microsoft Dynamics 365 Solution

Property	Value
Description	The iot alert that initiated this case
DisplayName	IoT Alert
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_iotalert
RequiredLevel	None
Targets	msdyn_iotalert
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team

Property	Value
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

ParentCaseId

Property	Value
Description	Choose the parent case for a case.
DisplayName	Parent Case
IsValidForForm	True
IsValidForRead	True
LogicalName	parentcaseid
RequiredLevel	None
Targets	incident
Type	Lookup

PrimaryContactId

Property	Value
Description	Select a primary contact for this case.
DisplayName	Contact
IsValidForForm	True
IsValidForRead	True
LogicalName	primarycontactid
RequiredLevel	None
Targets	contact

Property	Value
Type	Lookup

PriorityCode

Property	Value
Description	Select the priority so that preferred customers or critical issues are handled quickly.
DisplayName	Priority
IsValidForForm	True
IsValidForRead	True
LogicalName	prioritycode
RequiredLevel	None
Type	Picklist

PriorityCode Options

Value	Label
1	High
2	Normal
3	Low

ProcessId

Property	Value
Description	Contains the id of the process associated with the entity.
DisplayName	Process Id
IsValidForForm	False
IsValidForRead	True
LogicalName	processid
RequiredLevel	None
Type	Uniqueidentifier

ProductId

Property	Value
Description	Choose the product associated with the case to identify warranty, service, or other product issues and be able to report the number of incidents for each product.
DisplayName	Product

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	productid
RequiredLevel	None
Targets	product
Type	Lookup

ProductSerialNumber

Property	Value
Description	Type the serial number of the product that is associated with this case, so that the number of cases per product can be reported.
DisplayName	Serial Number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	productserialnumber
MaxLength	100
RequiredLevel	None
Type	String

ResolveBy

Property	Value
DateTimeBehavior	UserLocal
Description	Enter the date by when the case must be resolved.
DisplayName	Resolve By
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	resolveby
RequiredLevel	None
Type	DateTime

ResolveByKPIId

Property	Value
Description	For internal use only.
DisplayName	Resolve By KPI
IsValidForForm	True
IsValidForRead	True
LogicalName	resolvebykpiid
RequiredLevel	None
Targets	slakpiinstance
Type	Lookup

ResolveBySLAStatus

Property	Value
Description	Shows the status of the resolution time for the case according to the terms of the SLA.
DisplayName	Resolve By SLA Status
IsValidForForm	True
IsValidForRead	True
LogicalName	resolvebyslastatus
RequiredLevel	None
Type	Picklist

ResolveBySLAStatus Options

Value	Label
1	In Progress
2	Nearing Noncompliance
3	Succeeded
4	Noncompliant

ResponseBy

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	First Response By
Format	DateAndTime
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	responseby
RequiredLevel	None
Type	DateTime

ResponsibleContactId

Property	Value
Description	Choose an additional customer contact who can also help resolve the case.
DisplayName	Responsible Contact
IsValidForForm	True
IsValidForRead	True
LogicalName	responsiblecontactid
RequiredLevel	None
Targets	contact
Type	Lookup

RouteCase

Property	Value
Description	Tells whether the incident has been routed to queue or not.
DisplayName	Route Case
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	routecase
RequiredLevel	None
Type	Boolean

RouteCase Options

Value	Label
1	Yes
0	No

DefaultValue: True

SentimentValue

Property	Value
Description	Value derived after assessing words commonly associated with a negative, neutral, or positive sentiment that occurs in a social post. Sentiment information can also be reported as numeric values.
DisplayName	Sentiment Value
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	sentimentvalue
MaxValue	100000000000
MinValue	-100000000000
Precision	2
RequiredLevel	None
Type	Double

ServiceStage

Property	Value
Description	Select the stage, in the case resolution process, that the case is in.
DisplayName	Service Stage
IsValidForForm	True
IsValidForRead	True
LogicalName	servicestage
RequiredLevel	None
Type	Picklist

ServiceStage Options

Value	Label
0	Identify
1	Research
2	Resolve

SeverityCode

Property	Value
Description	Select the severity of this case to indicate the incident's impact on the customer's business.

Property	Value
DisplayName	Severity
IsValidForForm	True
IsValidForRead	True
LogicalName	severitycode
RequiredLevel	None
Type	Picklist

SeverityCode Options

Value	Label
1	Default Value

SLAId

Property	Value
Description	Choose the service level agreement (SLA) that you want to apply to the case record.
DisplayName	SLA
IsValidForForm	True
IsValidForRead	True
LogicalName	slaid
RequiredLevel	None
Targets	sla
Type	Lookup

SocialProfileId

Property	Value
Description	Unique identifier of the social profile with which the case is associated.
DisplayName	Social Profile
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	socialprofileid
RequiredLevel	None
Targets	socialprofile
Type	Lookup

StageId

Property	Value
Description	Contains the id of the stage where the entity is located.
DisplayName	(Deprecated) Stage Id
IsValidForForm	False
IsValidForRead	True
LogicalName	stageid
RequiredLevel	None
Type	Uniqueidentifier

StateCode

Property	Value
Description	Shows whether the case is active, resolved, or canceled. Resolved and canceled cases are read-only and can't be edited unless they are reactivated.
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Resolved	5	Resolved
2	Cancelled	6	Cancelled

StatusCode

Property	Value
Description	Select the case's status.
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	statuscode
RequiredLevel	None
Type	Status

StatusCode Options

Value	Label	State
1	In Progress	0
2	On Hold	0
3	Waiting for Details	0
4	Researching	0
5	Problem Solved	1
6	Cancelled	2
1000	Information Provided	1
2000	Merged	2

SubjectId

Property	Value
Description	Choose the subject for the case, such as catalog request or product complaint, so customer service managers can identify frequent requests or problem areas. Administrators can configure subjects under Business Management in the Settings area.
DisplayName	Subject
IsValidForForm	True
IsValidForRead	True
LogicalName	subjectid
RequiredLevel	None
Targets	subject
Type	Lookup

TicketNumber

Property	Value
Description	Shows the case number for customer reference and searching capabilities. This cannot be modified.
DisplayName	Case Number
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	ticketnumber
MaxLength	100
RequiredLevel	None
Type	String

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Title

Property	Value
Description	Type a subject or descriptive name, such as the request, issue, or company name, to identify the case in Microsoft Dynamics 365 views.
DisplayName	Case Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	title
MaxLength	200
RequiredLevel	ApplicationRequired

Property	Value
Type	String

TransactionCurrencyId

Property	Value
Description	Choose the local currency for the record to make sure budgets are reported in the correct currency.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid
RequiredLevel	None
Targets	transactioncurrency
Type	Lookup

TraversedPath

Property	Value
Description	A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur.
DisplayName	(Deprecated) Traversed Path
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	traversedpath
MaxLength	1250
RequiredLevel	None
Type	String

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- AccountId
- AccountIdName
- AccountIdYomiName
- ContactId
- ContactIdName
- ContactIdYomiName
- ContractDetailIdName
- ContractIdName
- CreatedBy
- CreatedByExternalParty
- CreatedByExternalPartyName
- CreatedByExternalPartyYomiName
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- CustomerIdName
- CustomerIdYomiName
- EntitlementIdName
- EntityImage_Timestamp
- EntityImage_URL
- EntityImageId
- EscalatedOn
- ExchangeRate
- FirstResponseByKPIIdName
- KbArticleIdName
- MasterIdName
- Merged
- ModifiedBy
- ModifiedByExternalParty
- ModifiedByExternalPartyName
- ModifiedByExternalPartyYomiName
- ModifiedByName
- ModifiedByYomiName

- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msa_partnercontactidName
- msa_partnercontactidYomiName
- msa_partneridName
- msa_partneridYomiName
- msdyn_iotalertName
- NumberOfChildIncidents
- OnHoldTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- ParentCaseIdName
- PrimaryContactIdName
- PrimaryContactIdYomiName
- ProductIdName
- ResolveByKPIIdName
- ResponsibleContactIdName
- ResponsibleContactIdYomiName
- SLAInvokedId
- SLAInvokedIdName
- SLAName
- SocialProfileIdName
- SubjectIdName
- TransactionCurrencyIdName
- VersionNumber

AccountId

Property	Value
Description	Unique identifier of the account with which the case is associated.
DisplayName	Account
IsValidForForm	False
IsValidForRead	True
LogicalName	accountid
RequiredLevel	None
Targets	account
Type	Lookup

AccountIdName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	accountidname
MaxLength	100
RequiredLevel	None
Type	String

AccountIdYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	accountidyominame
MaxLength	100
RequiredLevel	None
Type	String

ContactId

Property	Value
Description	Unique identifier of the contact associated with the case.
DisplayName	Contact
IsValidForForm	False
IsValidForRead	True
LogicalName	contactid
RequiredLevel	None
Targets	contact

Property	Value
Type	Lookup

ContactIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	contactidname
MaxLength	100
RequiredLevel	None
Type	String

ContactIdYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	contactidyominame
MaxLength	100
RequiredLevel	None
Type	String

ContractDetailIdName

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	contractdetailidname
MaxLength	100
RequiredLevel	None
Type	String

ContractIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	contractidname
MaxLength	100
RequiredLevel	None
Type	String

CreatedBy

Property	Value
Description	Shows who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByExternalParty

Property	Value
Description	Shows the external party who created the record.
DisplayName	Created By (External Party)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdbyexternalparty
RequiredLevel	None
Targets	externalparty
Type	Lookup

CreatedByExternalPartyName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyexternalpartyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByExternalPartyYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyexternalpartyyominame
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Property	Value
Description	Shows who created the record on behalf of another user.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CustomerIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	customeridname
MaxLength	160
RequiredLevel	ApplicationRequired
Type	String

CustomerIdYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	customeridyominame

Property	Value
MaxLength	450
RequiredLevel	ApplicationRequired
Type	String

EntitlementIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	entitlementidname
MaxLength	100
RequiredLevel	None
Type	String

EntityImage_Timestamp

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimage_timestamp
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

EntityImage_URL

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Url
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimage_url
MaxLength	200
RequiredLevel	None
Type	String

EntityImageId

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimageid
RequiredLevel	None
Type	Uniqueidentifier

EscalatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Indicates the date and time when the case was escalated.
DisplayName	Escalated On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	escalatedon
RequiredLevel	None
Type	DateTime

ExchangeRate

Property	Value

Property	Value
Description	Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.0000000001
Precision	10
RequiredLevel	None
Type	Decimal

FirstResponseByKPIIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	firstresponsebykpiidname
MaxLength	100
RequiredLevel	None
Type	String

KbArticleIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	kbarticleidname
MaxLength	100
RequiredLevel	None
Type	String

MasterIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	masteridname
MaxLength	100
RequiredLevel	None
Type	String

Merged

Property	Value
Description	Tells whether the incident has been merged with another incident.
DisplayName	Internal Use Only
IsValidForForm	True
IsValidForRead	True
LogicalName	merged
RequiredLevel	None
Type	Boolean

Merged Options

Value	Label
1	Yes
0	No

DefaultValue: False

ModifiedBy

Property	Value
Description	Shows who last updated the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByExternalParty

Property	Value
Description	Shows the external party who modified the record.
DisplayName	Modified By (External Party)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedbyexternalparty
RequiredLevel	None
Targets	externalparty
Type	Lookup

ModifiedByExternalPartyName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyexternalpartyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByExternalPartyYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyexternalpartyyominame
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Property	Value
Description	Shows who last updated the record on behalf of another user.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

msa_partnercontactidName

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msa_partnercontactidname
MaxLength	160
RequiredLevel	None

Property	Value
Type	String

msa_partnercontactidYomiName

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msa_partnercontactidyominame
MaxLength	450
RequiredLevel	None
Type	String

msa_partneridName

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msa_partneridname
MaxLength	160
RequiredLevel	None
Type	String

msa_partneridYomiName

Added by: Dynamics 365 Portals - Portal Dependencies Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msa_partneridyominame
MaxLength	160
RequiredLevel	None
Type	String

msdyn_iotalertName

Added by: Connected Customer Service for Microsoft Dynamics 365 Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_iotalertname
MaxLength	100
RequiredLevel	None
Type	String

NumberOfChildIncidents

Property	Value
Description	Number of child incidents associated with the incident.
DisplayName	Child Cases
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	numberofchildincidents

Property	Value
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

OnHoldTime

Property	Value
Description	Shows the duration in minutes for which the case was on hold.
DisplayName	On Hold Time (Minutes)
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	onholdtime
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

OwnerIdName

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Property	Value

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

ParentCaseIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	parentcaseidname
MaxLength	100
RequiredLevel	None
Type	String

PrimaryContactIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	primarycontactidname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

PrimaryContactIdYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	primarycontactidyominame
MaxLength	100
RequiredLevel	None
Type	String

ProductIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	productidname
MaxLength	100
RequiredLevel	None
Type	String

ResolveByKPIIdName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	resolvebykpiidname
MaxLength	100
RequiredLevel	None
Type	String

ResponsibleContactIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	responsiblecontactidname
MaxLength	100
RequiredLevel	None
Type	String

ResponsibleContactIdYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	responsiblecontactidyominame
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

SLAInvokedId

Property	Value
Description	Last SLA that was applied to this case. This field is for internal use only.
DisplayName	Last SLA applied
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedid
RequiredLevel	None
Targets	sla
Type	Lookup

SLAInvokedIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedidname
MaxLength	100
RequiredLevel	None
Type	String

SLAName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	slaname
MaxLength	100
RequiredLevel	None
Type	String

SocialProfileIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	socialprofileidname
MaxLength	100
RequiredLevel	None
Type	String

SubjectIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	subjectidname
MaxLength	100
RequiredLevel	None
Type	String

TransactionCurrencyIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- incident_existingcase
- incident_master_incident
- incident_parent_incident

incident_existingcase

Same as incident entity incident_existingcase Many-To-One relationship.

Property	Value
ReferencingEntity	incident
ReferencingAttribute	existingcase

Property	Value
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	incident_existingcase
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

incident_master_incident

Same as incident entity incident_master_incident Many-To-One relationship.

Property	Value
ReferencingEntity	incident
ReferencingAttribute	masterid
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	incident_master_incident
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

incident_parent_incident

Same as incident entity incident_parent_incident Many-To-One relationship.

Property	Value
ReferencingEntity	incident
ReferencingAttribute	parentcaseid
IsHierarchical	False
IsCustomizable	False

Property	Value
ReferencedEntityNavigationPropertyName	incident_parent_incident
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: Cascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_incidentbase_createdby
- lk_incidentbase_createdonbehalfby
- lk_incidentbase_modifiedby
- lk_incidentbase_modifiedonbehalfby
- system_user_incidents
- incident_existingcase
- incident_master_incident
- incident_parent_incident
- socialprofile_cases

lk_incidentbase_createdby

Added by: System Solution Solution

See systemuser Entity lk_incidentbase_createdby One-To-Many relationship.

lk_incidentbase_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_incidentbase_createdonbehalfby One-To-Many relationship.

lk_incidentbase_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_incidentbase_modifiedby One-To-Many relationship.

lk_incidentbase_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_incidentbase_modifiedonbehalfby One-To-Many relationship.

system_user_incidents

Added by: System Solution Solution

See systemuser Entity system_user_incidents One-To-Many relationship.

incident_existingcase

See incident Entity incident_existingcase One-To-Many relationship.

incident_master_incident

See incident Entity incident_master_incident One-To-Many relationship.

incident_parent_incident

See incident Entity incident_parent_incident One-To-Many relationship.

socialprofile_cases

Added by: System Solution Solution

See socialprofile Entity socialprofile_cases One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_actioninputparameter Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Attributes of action input parameters

Added by: Macros Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_actioninputparameters(*msdyn_actioninputparameterid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_actioninputparameters See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_actioninputparameters(*msdyn_actioninputparameterid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_actioninputparameters(*msdyn_actioninputparameterid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_actioninputparameters See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_actioninputparameters(*msdyn_actioninputparameterid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_actioninputparameters(*msdyn_actioninputparameterid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_actioninputparameters
DisplayCollectionName	Action Input Parameters
DisplayName	Action Input Parameter
EntitySetName	msdyn_actioninputparameters
IsBPFEntity	False
LogicalCollectionName	msdyn_actioninputparameters
LogicalName	msdyn_actioninputparameter

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_actioninputparameterid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_actioninputparameter

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_actioninputparameterId
- msdyn_ActionTemplateInputParameterId
- msdyn_name
- msdyn_parametertype
- msdyn_visibility
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_actioninputparameterId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Action Input Parameter
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_actioninputparameterid
RequiredLevel	SystemRequired

Property	Value
Type	Uniqueidentifier

msdyn_ActionTemplateInputParameterId

Property	Value
Description	Unique identifier for Macro Action Template associated with Action Input Parameter.
DisplayName	Action Template Input Parameter
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_actiontemplateinputparameterid
RequiredLevel	None
Targets	msdyn_macroactiontemplate
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_parametertype

Property	Value
Description	Unique value to store the parameter type
DisplayName	Parameter Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_parametertype
RequiredLevel	None
Type	Boolean

msdyn_parametertype Options

Value	Label
1	Mandatory
0	Optional

DefaultValue: False

msdyn_visibility

Property	Value
Description	Action card section that renders these parameters. Possible values: required,advanced,important,internal,read-only
DisplayName	Visibility
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_visibility
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Action Input Parameter
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Action Input Parameter
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ActionTemplateInputParameterIdName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit

- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ActionTemplateInputParameterIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_actiontemplateinputparameteridname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808

Property	Value
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_actionoutputparameter Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Macros Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_actionoutputparameters(*msdyn_actionoutputparameterid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_actionoutputparameters See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_actionoutputparameters(*msdyn_actionoutputparameterid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_actionoutputparameters(*msdyn_actionoutputparameterid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_actionoutputparameters See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReque
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_actionoutputparameters(*msdyn_actionoutputparameterid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_actionoutputparameters(*msdyn_actionoutputparameterid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_actionoutputparameters
DisplayCollectionName	Action Output Parameters
DisplayName	Action Output Parameter
EntitySetName	msdyn_actionoutputparameters
IsBPFEntity	False
LogicalCollectionName	msdyn_actionoutputparameters
LogicalName	msdyn_actionoutputparameter
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_actionoutputparameterid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_actionoutputparameter

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_actionoutputparameterId
- msdyn_actiontemplateoutputparameterid
- msdyn_name
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_actionoutputparameterId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Action Output Parameter
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_actionoutputparameterid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_actiontemplateoutputparameterid

Property	Value
Description	Unique identifier for Macro Action Template associated with Action Output Parameter.
DisplayName	Action Template Output Parameter
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_actiontemplateoutputparameterid
RequiredLevel	None
Targets	msdyn_macroactiontemplate
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Action Output Parameter
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Action Output Parameter

Property	Value
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_actiontemplateoutputparameteridName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_actiontemplateoutputparameteridName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_actiontemplateoutputparameteridname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_macroactiontemplate_msdyn_actionout

See msdyn_macroactiontemplate Entity msdyn_msdyn_macroactiontemplate_msdyn_actionout One-To-Many relationship.

Many-To-Many Relationships

Relationship details provided where the msdyn_actionoutputparameter entity is the first entity in the relationship. Listed by **SchemaName**.

msdyn_msdyn_paramdef_msdyn_actionoutputparam

See msdyn_parameterdefinition Entity msdyn_msdyn_paramdef_msdyn_actionoutputparam Many-To-Many Relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_agentcapacityprofileunit table/entity reference

Article • 04/06/2023

Agent Capacity Profile Units holds agent's available capacity for each capacity profile associated.

Added by: Omnichannel Agent Availability Status Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_agentcapacityprofileunits(*msdyn_agentcapacityprofileunitid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_agentcapacityprofileunits See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_agentcapacityprofileunits(*msdyn_agentcapacityprofileunitid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_agentcapacityprofileunits(*msdyn_agentcapacityprofileunitid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_agentcapacityprofileunits See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReq
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_agentcapacityprofileunits(*msdyn_agentcapacityprofileunitid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_agentcapacityprofileunits(*msdyn_agentcapacityprofileunitid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_agentcapacityprofileunits
DisplayCollectionName	Agent Capacity Profile Units
DisplayName	Agent Capacity Profile Unit
EntitySetName	msdyn_agentcapacityprofileunits
IsBPFEntity	False
LogicalCollectionName	msdyn_agentcapacityprofileunits
LogicalName	msdyn_agentcapacityprofileunit
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_agentcapacityprofileunitid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_agentcapacityprofileunit

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_agentcapacityprofileunitId
- msdyn_agentid
- msdyn_availablecapacityprofileunits
- msdyn_capacityprofileid
- msdyn_name
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_agentcapacityprofileunitId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Agent Capacity Profile Unit
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_agentcapacityprofileunitid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_agentid

Property	Value
Description	Lookup to SystemUser entity
DisplayName	Agent Id
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_agentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_availablecapacityprofileunits

Property	Value
Description	Available Capacity Profile Units
DisplayName	Available Capacity Profile Units
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_availablecapacityprofileunits
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_capacityprofileid

Property	Value
Description	Lookup to Capacity Profile entity
DisplayName	Capacity Profile Id
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_capacityprofileid
RequiredLevel	None
Targets	msdyn_capacityprofile
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.

Property	Value
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Agent Capacity Profile Unit
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Agent Capacity Profile Unit
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_agentidName
- msdyn_agentidYomiName
- msdyn_capacityprofileidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit

- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_agentidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidname

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

msdyn_agentidYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_capacityprofileidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_capacityprofileidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808

Property	Value
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_agentcapacityupdatehistory Entity Reference

Article • 02/13/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The entity used to store changes to the agent's history of capacity updates against capacity profiles.

Added by: Dynamics 365 UR Omnichanel Base Dependency Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_agentcapacityupdatehistories(*msdyn_agentcapacityupdatehistoryid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_agentcapacityupdatehistories See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_agentcapacityupdatehistories(*msdyn_agentcapacityupdatehistoryid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_agentcapacityupdatehistories(*msdyn_agentcapacityupdatehistoryid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_agentcapacityupdatehistories See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_agentcapacityupdatehistories(*msdyn_agentcapacityupdatehistoryid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_agentcapacityupdatehistories(*msdyn_agentcapacityupdatehistoryid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_agentcapacityupdatehistories
DisplayCollectionName	Agent capacity update histories
DisplayName	Agent capacity update history
EntitySetName	msdyn_agentcapacityupdatehistories
IsBPFEntity	False
LogicalCollectionName	msdyn_agentcapacityupdatehistories
LogicalName	msdyn_agentcapacityupdatehistory

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_agentcapacityupdatehistoryid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_agentcapacityupdatehistory

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_agentcapacityupdatehistoryId
- msdyn_agentid
- msdyn_availablecapacityprofileunits
- msdyn_blockassignment
- msdyn_capacityprofileid
- msdyn_defaultmaxunits
- msdyn_endtime
- msdyn_isforceassignment
- msdyn_isunitbased
- msdyn_name
- msdyn_presenceid
- msdyn_resetduration
- msdyn_sessionid
- msdyn_starttime
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_agentcapacityupdatehistoryId

Property	Value
Description	Unique identifier for entity instances

Property	Value
DisplayName	Agent capacity update history
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_agentcapacityupdatehistoryid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_agentid

Property	Value
Description	
DisplayName	Agent id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_availablecapacityprofileunits

Property	Value
Description	Available Capacity Profile Units
DisplayName	Available Capacity Profile Units
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_availablecapacityprofileunits
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_blockassignment

Property	Value
Description	When the work item limit is reached, a new work item won't be automatically assigned to the agent
DisplayName	Block Assignment
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_blockassignment
RequiredLevel	None

Property	Value
Type	Boolean

msdyn_blockassignment Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_capacityprofileid

Property	Value
Description	Lookup to msdyn_capacityprofile entity
DisplayName	Capacity profile id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_capacityprofileid
RequiredLevel	None
Targets	msdyn_capacityprofile
Type	Lookup

msdyn_defaultmaxunits

Property	Value
Description	The default max units of the capacity profile.
DisplayName	Default Max Units
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_defaultmaxunits
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_endtime

Property	Value
DateTimeBehavior	UserLocal
Description	End of current capacity update
DisplayName	End Time
Format	DateOnly
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_endtime
RequiredLevel	None
Type	DateTime

msdyn_isforceassignment

Property	Value
Description	Is force assigned by supervisor
DisplayName	Is Force Assignment
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isforceassignment
RequiredLevel	None
Type	Boolean

msdyn_isforceassignment Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_isunitbased

Property	Value
Description	Indicates if the capacity update is unit based or not
DisplayName	Is unit based
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isunitbased
RequiredLevel	None
Type	Boolean

msdyn_isunitbased Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_presenceid

Property	Value
Description	
DisplayName	Presence Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_presenceid
RequiredLevel	None
Targets	msdyn_presence
Type	Lookup

msdyn_resetduration

Property	Value
Description	The reset duration of the capacity profile.
DisplayName	Reset Duration
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_resetduration
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_sessionid

Property	Value
Description	
DisplayName	Session Id
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_sessionid
RequiredLevel	None
Targets	msdyn_ocsession
Type	Lookup

msdyn_starttime

Property	Value
DateTimeBehavior	UserLocal
Description	Start of a capacity update
DisplayName	Start Time
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_starttime
RequiredLevel	None
Type	DateTime

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired

Property	Value
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Agent capacity update history
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Agent capacity update history
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn

- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_agentidName
- msdyn_agentidYomiName
- msdyn_capacityprofileidName
- msdyn_presenceidName
- msdyn_sessionidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_agentidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_agentidYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_capacityprofileidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_capacityprofileidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_presenceidName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_presenceidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_sessionidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_sessionidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service
Manage historical data of capacity updates for agents

msdyn_agentscript Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Agent script

Added by: Agent scripts Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_agentscripts(*msdyn_agentscriptid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_agentscripts See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_agentscripts(*msdyn_agentscriptid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_agentscripts(*msdyn_agentscriptid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_agentscripts See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_agentscripts(*msdyn_agentscriptid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_agentscripts(*msdyn_agentscriptid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_agentscripts
DisplayCollectionName	Agent scripts

Property	Value
DisplayName	Agent script
EntitySetName	msdyn_agentscripts
IsBPFEntity	False
LogicalCollectionName	msdyn_agentscripts
LogicalName	msdyn_agentscript
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_agentscriptid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_agentscript

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_agentscriptId
- msdyn_Description
- msdyn_Language
- msdyn_name
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_agentscriptId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Agent script
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_agentscriptid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Description

Property	Value
Description	Description of the agent script
DisplayName	Description
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Language

Property	Value
Description	Language for agent script
DisplayName	Language
Format	Language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_language
MaxValue	2147483647
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team

Property	Value
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Agent script
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Agent script
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.

Property	Value
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_msdyn_agentscript_msdyn_agentscriptstep
- msdyn_msdyn_agentscript_routeaction

msdyn_msdyn_agentscript_msdyn_agentscriptstep

Same as msdyn_agentscriptstep entity msdyn_msdyn_agentscript_msdyn_agentscriptstep Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_agentscriptstep
ReferencingAttribute	msdyn_agentscriptid
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_agentscript_msdyn_agentscriptstep
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_agentscript_routeaction

Same as msdyn_agentscriptstep entity msdyn_msdyn_agentscript_routeaction Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_agentscriptstep
ReferencingAttribute	msdyn_routeactionid
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_agentscript_routeaction
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-Many Relationships

Relationship details provided where the msdyn_agentscript entity is the first entity in the relationship. Listed by **SchemaName**.

msdyn_msdyn_agentscript_msdyn_sessiontemplate

IntersectEntityName: msdyn_msdyn_agentscript_msdyn_sessiontemplate

Entity 1

Property	Value
IntersectAttribute	msdyn_agentscriptid
IsCustomizable	False
LogicalName	msdyn_agentscript
NavigationPropertyName	msdyn_msdyn_agentscript_msdyn_sessiontemplate
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Entity 2

Property	Value
LogicalName	msdyn_consoleapplicationsessiontemplate
IntersectAttribute	msdyn_consoleapplicationsessiontemplateid
NavigationPropertyName	msdyn_msdyn_agentscript_msdyn_sessiontemplate
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_agentscriptstep Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Agent script step

Added by: Agent scripts Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_agentscriptsteps(*msdyn_agentscriptstepid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_agentscriptsteps See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_agentscriptsteps(*msdyn_agentscriptstepid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_agentscriptsteps(*msdyn_agentscriptstepid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_agentscriptsteps See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_agentscriptsteps(*msdyn_agentscriptstepid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_agentscriptsteps(*msdyn_agentscriptstepid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_agentscriptsteps
DisplayCollectionName	Agent script steps
DisplayName	Agent script step
EntitySetName	msdyn_agentscriptsteps

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_agentscriptsteps
LogicalName	msdyn_agentscriptstep
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_agentscriptstepid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_agentscriptstep

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_ActionType
- msdyn_AgentScriptId
- msdyn_agentscriptstepId
- msdyn_Description
- msdyn_MacroActionId
- msdyn_name
- msdyn_Order
- msdyn_RouteActionId
- msdyn_TextInstruction
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_ActionType

Property	Value
Description	Action type for agent script step
DisplayName	Action type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_actiontype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_ActionType Options

Value	Label
192350000	Text
192350001	Macro
192350002	Script

msdyn_AgentScriptId

Property	Value
Description	Unique identifier for agent script associated with agent script step.
DisplayName	Agent script
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentscriptid
RequiredLevel	None
Targets	msdyn_agentscript
Type	Lookup

msdyn_agentscriptstepId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Agent script step
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_agentscriptstepid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Description

Property	Value
Description	Description for agent script step
DisplayName	Description
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	2000
RequiredLevel	None
Type	String

msdyn_MacroActionId

Property	Value
Description	Unique identifier for macro associated with agent script step.
DisplayName	Target macro
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_macroactionid
RequiredLevel	None
Targets	workflow
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	2000
RequiredLevel	ApplicationRequired
Type	String

msdyn_Order

Property	Value

Property	Value
Description	Display order
DisplayName	Order
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_order
MaxValue	2147483647
MinValue	1
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_RouteActionId

Property	Value
Description	Unique identifier for target script associated with agent script step.
DisplayName	Target script
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routeactionid
RequiredLevel	None
Targets	msdyn_agentscript
Type	Lookup

msdyn_TextInstruction

Property	Value
Description	Instruction for text action type
DisplayName	Text instructions
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_textinstruction
MaxLength	2000
RequiredLevel	None
Type	Memo

OverriddenCreatedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Agent script step

Property	Value
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Agent script step
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_AgentScriptIdName
- msdyn_MacroActionIdName
- msdyn_RouteActionIdName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_AgentScriptIdName

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentscriptidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_MacroActionIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_macroactionidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_RouteActionIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_routeactionidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_msdyn_agentscript_msdyn_agentscriptstep
- msdyn_msdyn_agentscript_routeaction

msdyn_msdyn_agentscript_msdyn_agentscriptstep

See msdyn_agentscript Entity msdyn_msdyn_agentscript_msdyn_agentscriptstep One-To-Many relationship.

msdyn_msdyn_agentscript_routeaction

See msdyn_agentscript Entity msdyn_msdyn_agentscript_routeaction One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_agentstatus entity reference

Article • 04/06/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Agent Status holds agent's status or presence details.

Added by: Omnichannel Agent Availability Status Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_agentstatuses(*msdyn_agentstatusid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_agentstatuses See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_agentstatuses(*msdyn_agentstatusid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_agentstatuses(*msdyn_agentstatusid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_agentstatuses See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_agentstatuses(*msdyn_agentstatusid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_agentstatuses(*msdyn_agentstatusid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_agentstatuses

Property	Value
DisplayCollectionName	agent status
DisplayName	Agent Status
EntitySetName	msdyn_agentstatuses
IsBPFEntity	False
LogicalCollectionName	msdyn_agentstatuses
LogicalName	msdyn_agentstatus
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_agentstatusid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_agentstatus

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_agentid
- msdyn_agentstatusId
- msdyn_availableunitscapacity
- msdyn_capacitymodifiedon
- msdyn_currentpresenceid
- msdyn_isblockedbysomeprofile
- msdyn_name
- msdyn_presencemodifiedby
- msdyn_presencemodifiedon
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber

Property	Value
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_agentid

Property	Value
Description	Lookup to systemuser entity
DisplayName	Agent Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_agentstatusId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Agent Status
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentstatusid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_availableunitscapacity

Property	Value
Description	Agent’s available unit-based capacity.
DisplayName	Available Units Capacity
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_availableunitscapacity
MaxValue	2147483647

Property	Value
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_capacitymodifiedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date time when agent's unit based capacity was updated
DisplayName	Capacity Modified On
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_capacitymodifiedon
RequiredLevel	None
Type	DateTime

msdyn_currentpresenceid

Property	Value
Description	Lookup to Presence entity. Current presence status of agent. Includes custom presence as well.
DisplayName	Current Presence
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_currentpresenceid
RequiredLevel	None
Targets	msdyn_presence
Type	Lookup

msdyn_isblockedbysomeprofile

Property	Value
Description	Indicates if agent is currently blocked by some profile
DisplayName	Is Blocked By Some Profile
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isblockedbysomeprofile
RequiredLevel	None

Property	Value
Type	Boolean

msdyn_isblockedbysomeprofile Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_presencemodifiedby

Property	Value
Description	Lookup to SystemUser entity
DisplayName	Presence Modified By
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_presencemodifiedby
MaxLength	100
RequiredLevel	None
Type	String

msdyn_presencemodifiedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date time when agent's presence was updated
DisplayName	Presence Modified On
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_presencemodifiedon
RequiredLevel	None
Type	DateTime

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Agent Status
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Agent Status
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName

- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_agentidName
- msdyn_agentidYomiName
- msdyn_currentpresenceidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_agentidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_agentidYomiName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_currentpresenceidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_currentpresenceidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_agentstatushistory entity reference

Article • 03/17/2023

> **Note**
>
> Unsure about table vs. entity? See **Developers: Understand terminology in Microsoft Dataverse**. Agent status history entity records any changes to agent's presence or available capacity.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_agentstatushistories(*msdyn_agentstatushistoryid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_agentstatushistories See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_agentstatushistories(*msdyn_agentstatushistoryid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_agentstatushistories(*msdyn_agentstatushistoryid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_agentstatushistories See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_agentstatushistories(*msdyn_agentstatushistoryid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_agentstatushistories(*msdyn_agentstatushistoryid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_agentstatushistories
DisplayCollectionName	Agent Status Histories
DisplayName	Agent Status history
EntitySetName	msdyn_agentstatushistories
IsBPFEntity	False
LogicalCollectionName	msdyn_agentstatushistories

Property	Value
LogicalName	msdyn_agentstatushistory
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_agentstatushistoryid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_agentstatushistory

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_Agentid
- msdyn_agentstatushistoryId
- msdyn_availablecapacity
- msdyn_endtime
- msdyn_isagentloggedin
- msdyn_name
- msdyn_presenceid
- msdyn_starttime
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_Agentid

Property	Value
Description	A unique identifier of the system user associated with the agent status history
DisplayName	Agent id

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_agentstatushistoryId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Agent Status history
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_agentstatushistoryid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_availablecapacity

Property	Value
Description	Represents capacity available with an agent
DisplayName	availablecapacity
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_availablecapacity
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_endtime

Property	Value
DateTimeBehavior	UserLocal
Description	Displays end time for the current presence or capacity update of the agent
DisplayName	endtime
Format	DateAndTime
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_endtime
RequiredLevel	None
Type	DateTime

msdyn_isagentloggedin

Property	Value
Description	Determines whether agent is logged into Omnichannel for Customer Service.
DisplayName	Determines if the Agent is logged in.
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isagentloggedin
RequiredLevel	None
Type	Boolean

msdyn_isagentloggedin Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_presenceid

Property	Value
Description	A unique identifier to the Agent Presence entity
DisplayName	presenceid

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_presenceid
RequiredLevel	None
Targets	msdyn_presence
Type	Lookup

msdyn_starttime

Property	Value
DateTimeBehavior	UserLocal
Description	Start time when the agent's presence or capacity changed
DisplayName	starttime
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_starttime
RequiredLevel	None
Type	DateTime

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Agent Status history
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Agent Status history
DisplayName	Status Reason
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_AgentidName
- msdyn_AgentidYomiName
- msdyn_presenceidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.

Property	Value
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_AgentidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_AgentidYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_presenceidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_presenceidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	160
RequiredLevel	None
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

About the Entity Reference
Web API Reference

msdyn_analytics Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the Power BI configurations for supervisor experience

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_analyticses(*msdyn_analyticsid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_analyticses See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_analyticses(*msdyn_analyticsid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_analyticses(*msdyn_analyticsid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_analyticses See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_analyticses(*msdyn_analyticsid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_analyticses(*msdyn_analyticsid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_analyticses

Property	Value
DisplayCollectionName	Power BI Configurations
DisplayName	Power BI Configuration
EntitySetName	msdyn_analyticses
IsBPFEntity	False
LogicalCollectionName	msdyn_analyticses
LogicalName	msdyn_analytics
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_analyticsid
PrimaryNameAttribute	msdyn_title
SchemaName	msdyn_analytics

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_analyticsId
- msdyn_ispaasenabled
- msdyn_KeyvaultUri
- msdyn_nativeappid
- msdyn_ocanalyticspreviewenable
- msdyn_Title
- msdyn_WorkspaceId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647

Property	Value
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_analyticsId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Power BI Configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_analyticsid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ispaasenabled

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Use preconfigured Power BI workspace
DisplayName	Use preconfigured Power BI workspace
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ispaasenabled
RequiredLevel	None
Type	Boolean

msdyn_ispaasenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_KeyvaultUri

Property	Value

Property	Value
Description	Azure Key Vault URI
DisplayName	Azure Key Vault URI
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_keyvaulturi
MaxLength	200
RequiredLevel	None
Type	String

msdyn_nativeappid

Property	Value
Description	Power BI native app ID
DisplayName	Power BI native app ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_nativeappid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocanalyticspreviewenable

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	This will create the intraday insights tab for supervisors
DisplayName	Show intraday insights
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocanalyticspreviewenable
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_ocanalyticspreviewenable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_Title

Property	Value
Description	Title for analytics configuration
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_title
MaxLength	100
RequiredLevel	None
Type	String

msdyn_WorkspaceId

Property	Value
Description	Power BI workspace ID
DisplayName	Power BI workspace
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_workspaceid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Power BI Configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Power BI Configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OwnerIdName

- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	
Type	Lookup

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808

Property	Value
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_assignmentconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Dynamics 365 UR Core Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurations(*msdyn_assignmentconfigurationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurations(*msdyn_assignmentconfigurationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurations(*msdyn_assignmentconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRe
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurations(*msdyn_assignmentconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurations(*msdyn_assignmentconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_assignmentconfigurations
DisplayCollectionName	Assignment Configurations
DisplayName	Assignment Configuration
EntitySetName	msdyn_assignmentconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_assignmentconfigurations
LogicalName	msdyn_assignmentconfiguration
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_assignmentconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_assignmentconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_assignmentconfigurationId
- msdyn_description
- msdyn_isactiveconfiguration
- msdyn_name
- msdyn_queueid
- msdyn_UniqueName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_assignmentconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Assignment Configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_assignmentconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_description

Property	Value
Description	Description of the Assignment config record
DisplayName	Description
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	500
RequiredLevel	None
Type	String

msdyn_isactiveconfiguration

Property	Value
Description	
DisplayName	Is Active Configuration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isactiveconfiguration
RequiredLevel	None
Type	Boolean

msdyn_isactiveconfiguration Options

Value	Label

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_queueid

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Unique identifier for Queue associated with Assignment Configuration.
DisplayName	Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueid
RequiredLevel	None
Targets	queue
Type	Lookup

msdyn_UniqueName

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename

Property	Value
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Assignment Configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Assignment Configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_queueidName
- OverwriteTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_queueidName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_queueidname
MaxLength	200
RequiredLevel	None
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_assignmentconfigurationstep Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Dynamics 365 UR Core Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurationsteps(*msdyn_assignmentconfigurationstepid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurationsteps See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurationsteps(*msdyn_assignmentconfigurationstepid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurationsteps(*msdyn_assignmentconfigurationstepid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurationsteps See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessReque
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndA
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurationsteps(*msdyn_assignmentconfigurationstepid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_assignmentconfigurationsteps(*msdyn_assignmentconfigurationstepid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_assignmentconfigurationsteps
DisplayCollectionName	Assignment Configuration Steps
DisplayName	Assignment Configuration Step
EntitySetName	msdyn_assignmentconfigurationsteps
IsBPFEntity	False
LogicalCollectionName	msdyn_assignmentconfigurationsteps
LogicalName	msdyn_assignmentconfigurationstep
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_assignmentconfigurationstepid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_assignmentconfigurationstep

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_assignmentconfigurationid
- msdyn_assignmentconfigurationstepId
- msdyn_isdefaultruleset
- msdyn_name
- msdyn_rulesetid
- msdyn_steporder
- msdyn_type
- msdyn_UniqueName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_assignmentconfigurationid

Property	Value
Description	Unique identifier for Assignment Configuration associated with Assignment Configuration Step.
DisplayName	Assignment Configuration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_assignmentconfigurationid
RequiredLevel	None
Targets	msdyn_assignmentconfiguration
Type	Lookup

msdyn_assignmentconfigurationstepId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Assignment Configuration Step
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_assignmentconfigurationstepid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_isdefaultruleset

Property	Value
Description	Is default ruleset
DisplayName	Is default ruleset
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isdefaultruleset
RequiredLevel	None
Type	Boolean

msdyn_isdefaultruleset Options

Value	Label
1	Yes

Value	Label
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_rulesetid

Property	Value
Description	
DisplayName	Rule Set
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_rulesetid
RequiredLevel	None
Targets	msdyn_decisionruleset
Type	Lookup

msdyn_steporder

Property	Value
Description	
DisplayName	Step Order
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_steporder
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_type

Property	Value
Description	
DisplayName	Step Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
RequiredLevel	None
Type	Picklist

msdyn_type Options

Value	Label
192350000	Prioritization
192350001	AssignmentRuleSelection
192350002	Assignment

msdyn_UniqueName

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon

Property	Value
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Assignment Configuration Step
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Assignment Configuration Step
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_assignmentconfigurationidName
- msdyn_rulesetidName
- OverwriteTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_assignmentconfigurationidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_assignmentconfigurationidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_rulesetidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_rulesetidname

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_authenticationsettings table/entity reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the settings for user authentication

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_authenticationsettingses(*msdyn_authenticationsettingsid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_authenticationsettingses See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_authenticationsettingses(*msdyn_authenticationsettingsid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_authenticationsettingses(*msdyn_authenticationsettingsid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_authenticationsettingses See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReques
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_authenticationsettingses(*msdyn_authenticationsettingsid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_authenticationsettingses(*msdyn_authenticationsettingsid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_authenticationsettingses
DisplayCollectionName	Authentication Settings
DisplayName	Authentication Settings
EntitySetName	msdyn_authenticationsettingses
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_authenticationsettingses
LogicalName	msdyn_authenticationsettings
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_authenticationsettingsid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_authenticationsettings

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_authenticationclientid
- msdyn_authenticationclientsecret
- msdyn_authenticationscopes
- msdyn_authenticationsettingsId
- msdyn_Authenticationtype
- msdyn_authserviceconfigsetid
- msdyn_authservicescopeid
- msdyn_decryptedtokenurl
- msdyn_endpointregion
- msdyn_JavaScriptclientfunction
- msdyn_name
- msdyn_ocauthchanneltype
- msdyn_PublickeyURL
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_authenticationclientid

Property	Value
Description	Auth service Client Id
DisplayName	Auth service Client ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_authenticationclientid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_authenticationclientsecret

Property	Value
Description	Auth service client secret
DisplayName	Auth service client secret
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_authenticationclientsecret
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_authenticationscopes

Property	Value
Description	Auth service scopes
DisplayName	Auth service scopes
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_authenticationscopes
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_authenticationsettingsId

Property	Value
Description	Unique identifier for entity instances

Property	Value
DisplayName	Authentication Settings
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_authenticationsettingsid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Authenticationtype

Property	Value
Description	Authentication Type which will be applied to the chat
DisplayName	Authentication Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_authenticationtype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_Authenticationtype Choices/Options

Value	Label
192350000	OAuth 2.0 implicit flow
192350001	OAuth 2.0 code flow
192350002	Gatekeeper Biometric Authentication

msdyn_authserviceconfigsetid

Added by: Omnichannel - Telephony Solution

Property	Value
Description	Config Set ID for Gatekeeper authentication service
DisplayName	Config Set ID for Gatekeeper authentication service
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_authserviceconfigsetid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_authservicescopeid

Added by: Omnichannel - Telephony Solution

Property	Value
Description	Scope ID for Gatekeeper authentication service
DisplayName	Scope ID for Gatekeeper authentication service
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_authservicescopeid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_decryptedtokenurl

Property	Value
Description	Decrypted token url to hit with Access token
DisplayName	Decrypted Token URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_decryptedtokenurl
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_endpointregion

Property	Value
Description	Endpoint region for authentication setting
DisplayName	Endpoint region
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_endpointregion
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_endpointregion Choices/Options

Value	Label
192440001	United States

Value	Label
192440002	Canada
192440003	United Kingdom

msdyn_JavaScriptclientfunction

Property	Value
Description	Javascript function which will need to return the authentication token
DisplayName	JavaScript client function
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_javascriptclientfunction
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocauthchanneltype

Property	Value
Description	
DisplayName	Channel Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocauthchanneltype
RequiredLevel	None
Type	Picklist

msdyn_ocauthchanneltype Choices/Options

Value	Label
192360000	Live chat
192440000	Voice
192450000	Apple Messages For Business

msdyn_PublickeyURL

Property	Value
Description	URL to the Public Key which will be used for token validation
DisplayName	Public key URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_publickeyurl
MaxLength	256
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired

Property	Value
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Authentication settings
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Authentication settings
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn

- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_bookableresourcecapacityprofile Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Bookable Resource Capacity Profile

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_bookableresourcecapacityprofiles(*msdyn_bookableresourcecapacityprofileid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_bookableresourcecapacityprofiles See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_bookableresourcecapacityprofiles(*msdyn_bookableresourcecapacityprofileid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRe
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_bookableresourcecapacityprofiles(*msdyn_bookableresourcecapacityprofileid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_bookableresourcecapacityprofiles See Query Data	RetrieveMultipleReques RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccess
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipal
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_bookableresourcecapacityprofiles(*msdyn_bookableresourcecapacityprofileid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_bookableresourcecapacityprofiles(*msdyn_bookableresourcecapacityprofileid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_bookableresourcecapacityprofiles
DisplayCollectionName	Bookable Resource Capacity Profiles
DisplayName	Bookable Resource Capacity Profile
EntitySetName	msdyn_bookableresourcecapacityprofiles
IsBPFEntity	False
LogicalCollectionName	msdyn_bookableresourcecapacityprofiles
LogicalName	msdyn_bookableresourcecapacityprofile

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_bookableresourcecapacityprofileid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_bookableresourcecapacityprofile

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_bookableresourcecapacityprofileId
- msdyn_bookableresourceid
- msdyn_capacityprofileid
- msdyn_maxunits
- msdyn_name
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_bookableresourcecapacityprofileId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Bookable Resource Capacity Profile
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_bookableresourcecapacityprofileid
RequiredLevel	SystemRequired

Property	Value
Type	Uniqueidentifier

msdyn_bookableresourceid

Property	Value
Description	Choose the resource associated with the profile.
DisplayName	Bookable Resource
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_bookableresourceid
RequiredLevel	ApplicationRequired
Targets	bookableresource
Type	Lookup

msdyn_capacityprofileid

Property	Value
Description	Choose the capacity profile to associate with the resource.
DisplayName	Capacity Profile
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_capacityprofileid
RequiredLevel	ApplicationRequired
Targets	msdyn_capacityprofile
Type	Lookup

msdyn_maxunits

Property	Value
Description	Max capacity profile units for the resource.
DisplayName	Max Units
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_maxunits
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value

Property	Value
Description	The name of the Bookable Resource Capacity Profile.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Bookable Resource Capacity Profile
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Bookable Resource Capacity Profile
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_bookableresourceidName
- msdyn_capacityprofileidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam

- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_bookableresourceidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_bookableresourceidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_capacityprofileidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_capacityprofileidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_cannedmessage Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the quick replies that agents can use in the conversation control while interacting with the customers

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_cannedmessages See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_cannedmessages(*msdyn_cannedmessageid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_cannedmessages(*msdyn_cannedmessageid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_cannedmessages See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_cannedmessages(*msdyn_cannedmessageid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_cannedmessages(*msdyn_cannedmessageid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_cannedmessages
DisplayCollectionName	Quick replies
DisplayName	Quick reply
EntitySetName	msdyn_cannedmessages

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_cannedmessages
LogicalName	msdyn_cannedmessage
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_cannedmessageid
PrimaryNameAttribute	msdyn_title
SchemaName	msdyn_cannedmessage

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_cannedmessageId
- msdyn_Locale_Field
- msdyn_message
- msdyn_tagscontrolfield
- msdyn_title
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

msdyn_cannedmessageId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Quick reply
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_cannedmessageid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Locale_Field

Property	Value
Description	The locale of a canned message
DisplayName	Locale
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_locale_field
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_Locale_Field Options

Value	Label
1025	ar-SA
1026	bg-BG
1027	ca-ES
1028	zh-TW

Value	Label
1029	cs-CZ
1030	da-DK
1031	de-DE
1032	el-GR
1033	en-US
1035	fi-FI
1036	fr-FR
1037	he-IL
1038	hu-HU
1040	it-IT
1041	ja-JP
1042	ko-KR
1043	nl-NL
1044	nb-NO
1045	pl-PL
1046	pt-BR
1048	ro-RO
1049	ru-RU
1050	hr-HR
1051	sk-SK
1053	sv-SE
1054	th-TH
1055	tr-TR
1057	id-ID
1058	uk-UA
1060	sl-SI
1061	et-EE
1062	lv-LV
1063	lt-LT
1066	vi-VN
1069	eu-ES

Value	Label
1081	hi-IN
1086	ms-MY
1087	kk-KZ
1110	gl-ES
2052	zh-CN
2070	pt-PT
3076	zh-HK
3082	es-ES
3098	sr-Cyrl-CS

msdyn_message

Property	Value
Description	Canned message text
DisplayName	Message
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_message
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	Memo

msdyn_tagscontrolfield

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Dummy field to render the tags control
DisplayName	TagsControlField
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_tagscontrolfield
MaxLength	100
RequiredLevel	None
Type	String

msdyn_title

Property	Value
Description	The name of the custom entity.
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_title
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None

Property	Value
Type	DateTime

statecode

Property	Value
Description	Status of the Quick replies
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Quick replies
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon

Property	Value
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon

Property	Value
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-Many Relationships

Relationship details provided where the msdyn_cannedmessage entity is the first entity in the relationship. Listed by **SchemaName**.

msdyn_msdyn_cannedmessage_liveworkstream

IntersectEntityName: msdyn_msdyn_cannedmessage_liveworkstream

Entity 1

Property	Value
IntersectAttribute	msdyn_cannedmessageid
IsCustomizable	True

Property	Value
LogicalName	msdyn_cannedmessage
NavigationPropertyName	msdyn_msdyn_cannedmessage_liveworkstream
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Entity 2

Property	Value
LogicalName	msdyn_liveworkstream
IntersectAttribute	msdyn_liveworkstreamid
NavigationPropertyName	msdyn_msdyn_cannedmessage_liveworkstream
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_capacityprofile Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Capacity Profiles

Added by: Dynamics 365 UR Core Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_capacityprofiles(*msdyn_capacityprofileid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_capacityprofiles See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_capacityprofiles(*msdyn_capacityprofileid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_capacityprofiles(*msdyn_capacityprofileid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_capacityprofiles See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_capacityprofiles(*msdyn_capacityprofileid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_capacityprofiles(*msdyn_capacityprofileid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_capacityprofiles
DisplayCollectionName	Capacity Profiles
DisplayName	Capacity Profile
EntitySetName	msdyn_capacityprofiles

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_capacityprofiles
LogicalName	msdyn_capacityprofile
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_capacityprofileid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_capacityprofile

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_blockassignment
- msdyn_capacityprofileId
- msdyn_defaultmaxunits
- msdyn_name
- msdyn_resetduration
- msdyn_UniqueName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_blockassignment

Property	Value
Description	The block assignment of the capacity profile.
DisplayName	Block Assignment
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_blockassignment
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_blockassignment Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_capacityprofileId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Capacity Profile
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_capacityprofileid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_defaultmaxunits

Property	Value
Description	The default max units of the capacity profile.
DisplayName	Default Max Units
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_defaultmaxunits
MaxValue	100
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_name

Property	Value
Description	The name of the Capacity Profile.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_resetduration

Property	Value
Description	The reset duration of the capacity profile.
DisplayName	Reset Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_resetduration
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_resetduration Options

Value	Label
192350000	Immediate
192350001	Daily

msdyn_UniqueName

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Capacity Profile
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Capacity Profile

Property	Value
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None

Property	Value
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OverwriteTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_cdsentityengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Entity Routing Contexts

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_cdsentityengagementctxes(*msdyn_cdsentityengagementctxid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_cdsentityengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_cdsentityengagementctxes(*msdyn_cdsentityengagementctxid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_cdsentityengagementctxes(*msdyn_cdsentityengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_cdsentityengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRe
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_cdsentityengagementctxes(*msdyn_cdsentityengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_cdsentityengagementctxes(*msdyn_cdsentityengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_cdsentityengagementctxes
DisplayCollectionName	Entity Routing Contexts
DisplayName	Entity Routing Context
EntitySetName	msdyn_cdsentityengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_cdsentityengagementctxes
LogicalName	msdyn_cdsentityengagementctx

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_cdsentityengagementctxid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_cdsentityengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_cdsentityengagementctxId
- msdyn_engagedentitysetname
- msdyn_liveworkitemid
- msdyn_name
- msdyn_recordid
- msdyn_workitemrelation
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_cdsentityengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Entity Routing Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_cdsentityengagementctxid

Property	Value
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_engagedentitysetname

Property	Value
Description	Name of the entity
DisplayName	Engaged Entity Set Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_engagedentitysetname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique Identifier of Conversation
DisplayName	Conversation Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_recordid

Property	Value
Description	Unique Identifier of the record being routed
DisplayName	Record Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_recordid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_workitemrelation

Property	Value
Description	Relationship name of the entity with LiveWorkItem entity
DisplayName	Work Item Relation
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_workitemrelation
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Entity routing context
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Entity routing context

Property	Value
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_ocliveworkitem_msdyn_cdsentityengagementctx_liveworkitemid

Added by: Active Solution Solution

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_channelcapability Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The capability that a channel can enable, such as co-browse, screen sharing.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_channelcapabilities See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_channelcapabilities(*msdyn_channelcapabilityid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_channelcapabilities(*msdyn_channelcapabilityid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_channelcapabilities See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_channelcapabilities(*msdyn_channelcapabilityid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_channelcapabilities(*msdyn_channelcapabilityid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_channelcapabilities
DisplayCollectionName	Channel Capabilites
DisplayName	Channel Capability
EntitySetName	msdyn_channelcapabilities
IsBPFEntity	False
LogicalCollectionName	msdyn_channelcapabilities
LogicalName	msdyn_channelcapability

Property	Value
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_channelcapabilityid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_channelcapability

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_channelcapabilityId
- msdyn_ConversationAction
- msdyn_EscalationChannelMode
- msdyn_name
- msdyn_Provider
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_channelcapabilityId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Channel Capability

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_channelcapabilityid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ConversationAction

Property	Value
Description	Conversation action ID
DisplayName	Conversation Action
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_conversationaction
RequiredLevel	None
Targets	msdyn_conversationaction
Type	Lookup

msdyn_EscalationChannelMode

Property	Value
Description	Escalation channel mode such as Co-browse, screensharing
DisplayName	Escalation Channel Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_escalationchannelmode
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_EscalationChannelMode Options

Value	Label
100000000	Screen sharing
192350000	Audio
192350001	Video

Value	Label
192350002	Co-browse
192350003	None

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_Provider

Property	Value
Description	Channel provider identifier
DisplayName	Provider
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_provider
RequiredLevel	ApplicationRequired
Targets	msdyn_provider
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Channel Capability
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Channel Capability
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName

- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ConversationActionName
- msdyn_ProviderName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ConversationActionName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_conversationactionname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ProviderName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_providername
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization

Property	Value
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_conversationaction_msdyn_channelcapability_ConversationAction

See msdyn_conversationaction Entity
msdyn_msdyn_conversationaction_msdyn_channelcapability_ConversationAction One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_chatansweroption Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the answer options for a question of type option set

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_chatansweroptions(*msdyn_chatansweroptionid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_chatansweroptions See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_chatansweroptions(*msdyn_chatansweroptionid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_chatansweroptions(*msdyn_chatansweroptionid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_chatansweroptions See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_chatansweroptions(*msdyn_chatansweroptionid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_chatansweroptions(*msdyn_chatansweroptionid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_chatansweroptions
DisplayCollectionName	Survey Answer Options
DisplayName	Survey Answer Option
EntitySetName	msdyn_chatansweroptions
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_chatansweroptions
LogicalName	msdyn_chatansweroption
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_chatansweroptionid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_chatansweroption

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_AnswerOptionsId
- msdyn_chatansweroptionId
- msdyn_name
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_AnswerOptionsId

Property	Value
Description	Unique identifier for Survey Question associated with Survey answer option.
DisplayName	Survey question
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_answeroptionsid
RequiredLevel	None
Targets	msdyn_surveyquestion
Type	Lookup

msdyn_chatansweroptionId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Survey Answer Option
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_chatansweroptionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Chat Answer Option
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Chat Answer Option
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_AnswerOptionsIdName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_AnswerOptionsIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_answeroptionsidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_chatansweroption_msdyn_chatquestionnaireresponseitem

Same as msdyn_chatquestionnaireresponseitem entity msdyn_msdyn_chatansweroption_msdyn_chatquestionnaireresponseitem Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_chatquestionnaireresponseitem

Property	Value
ReferencingAttribute	msdyn_chatansweroptionid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_chatansweroption_msdyn_chatquestionnaireresponseitem
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_surveyquestion_msdyn_chatansweroption

See msdyn_surveyquestion Entity msdyn_surveyquestion_msdyn_chatansweroption One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_chatquestionnaireresponse Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores survey responses when a customer submits a survey

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponses(*msdyn_chatquestionnaireresponseid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponses See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponses(*msdyn_chatquestionnaireresponseid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponses(*msdyn_chatquestionnaireresponseid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponses See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcces
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponses(*msdyn_chatquestionnaireresponseid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponses(*msdyn_chatquestionnaireresponseid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Entity Properties

Property	Value
CollectionSchemaName	msdyn_chatquestionnaireresponses
DisplayCollectionName	Survey Responses
DisplayName	Survey Response
EntitySetName	msdyn_chatquestionnaireresponses
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_chatquestionnaireresponses
LogicalName	msdyn_chatquestionnaireresponse
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_chatquestionnaireresponseid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_chatquestionnaireresponse

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_chatquestionnaireresponseId
- msdyn_livechatconfigid
- msdyn_mode
- msdyn_name
- msdyn_ocliveworkitemid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_chatquestionnaireresponseId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Survey Response
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	msdyn_chatquestionnaireresponseid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_livechatconfigid

Property	Value
Description	Live Chat Widget Config ID
DisplayName	Chat widget
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_livechatconfigid
RequiredLevel	None
Targets	msdyn_livechatconfig
Type	Lookup

msdyn_mode

Property	Value
Description	Questionnaire Mode
DisplayName	Mode
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_mode
MaxLength	200
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocliveworkitemid

Property	Value
Description	Conversation Identifier
DisplayName	Conversation Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Chat Questionnaire Response
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Chat Questionnaire Response
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_livechatconfigidName
- msdyn_ocliveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam

- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_livechatconfigidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_livechatconfigidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocliveworkitemidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_chatquestionnaireresponse_msdyn_chatquestionnaireresponseitem_nested

Same as msdyn_chatquestionnaireresponseitem entity msdyn_msdyn_chatquestionnaireresponse_msdyn_chatquestionnaireresponseitem_nested Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_chatquestionnaireresponseitem
ReferencingAttribute	msdyn_chatquestionnaireresponseid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_chatquestionnaireresponse_msdyn_chatquestionnaireresponseitem_nested
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_livechatconfig_msdyn_chatquestionnaireresponse

See msdyn_livechatconfig Entity msdyn_msdyn_livechatconfig_msdyn_chatquestionnaireresponse One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_chatquestionnaireresponseitem Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores survey response values

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponseitems(*msdyn_chatquestionnaireresponseitemid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponseitems See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponseitems(*msdyn_chatquestionnaireresponseitemid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionReq
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponseitems(*msdyn_chatquestionnaireresponseitemid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponseitems See Query Data	RetrieveMultipleRequest RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRe
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsA
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponseitems(*msdyn_chatquestionnaireresponseitemid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_chatquestionnaireresponseitems(*msdyn_chatquestionnaireresponseitemid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Entity Properties

Property	Value
CollectionSchemaName	msdyn_chatquestionnaireresponseitems
DisplayCollectionName	Survey Response Values
DisplayName	Survey Response Value
EntitySetName	msdyn_chatquestionnaireresponseitems
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_chatquestionnaireresponseitems
LogicalName	msdyn_chatquestionnaireresponseitem
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_chatquestionnaireresponseitemid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_chatquestionnaireresponseitem

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_chatansweroptionid
- msdyn_ChatAnswerText
- msdyn_ChatQuestionnaireResponseId
- msdyn_chatquestionnaireresponseitemId
- msdyn_name
- msdyn_surveyquestionid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_chatansweroptionid

Property	Value
Description	Survey answer option
DisplayName	Survey answer option
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_chatansweroptionid
RequiredLevel	None
Targets	msdyn_chatansweroption
Type	Lookup

msdyn_ChatAnswerText

Property	Value
Description	Survey answer text
DisplayName	Survey answer text
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_chatanswertext
MaxLength	500
RequiredLevel	None
Type	String

msdyn_ChatQuestionnaireResponseId

Property	Value
Description	Survey response
DisplayName	Survey response
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_chatquestionnaireresponseid
RequiredLevel	None
Targets	msdyn_chatquestionnaireresponse
Type	Lookup

msdyn_chatquestionnaireresponseitemId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Survey Response Values
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_chatquestionnaireresponseitemid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_surveyquestionid

Property	Value
Description	Survey Question Id
DisplayName	Survey Question Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_surveyquestionid
RequiredLevel	None
Targets	msdyn_surveyquestion
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Survey Response value
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Survey response value

Property	Value
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_chatansweroptionidName
- msdyn_ChatQuestionnaireResponseIdName
- msdyn_surveyquestionidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_chatansweroptionidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_chatansweroptionidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ChatQuestionnaireResponseIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_chatquestionnaireresponseidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_surveyquestionidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_surveyquestionidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_msdyn_chatquestionnaireresponse_msdyn_chatquestionnaireresponseitem_nested
- msdyn_msdyn_surveyquestion_msdyn_chatquestionnaireresponseitem

msdyn_msdyn_chatquestionnaireresponse_msdyn_chatquestionnaireresponseitem_nested

See msdyn_chatquestionnaireresponse Entity msdyn_msdyn_chatquestionnaireresponse_msdyn_chatquestionnaireresponseitem_nested One-To-Many relationship.

msdyn_msdyn_surveyquestion_msdyn_chatquestionnaireresponseitem

See msdyn_surveyquestion Entity msdyn_msdyn_surveyquestion_msdyn_chatquestionnaireresponseitem One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_chatwidgetlanguage Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The language of the configured live chat widget.

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_chatwidgetlanguages(*msdyn_chatwidgetlanguageid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_chatwidgetlanguages See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_chatwidgetlanguages(*msdyn_chatwidgetlanguageid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_chatwidgetlanguages(*msdyn_chatwidgetlanguageid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_chatwidgetlanguages See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_chatwidgetlanguages(*msdyn_chatwidgetlanguageid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_chatwidgetlanguages(*msdyn_chatwidgetlanguageid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_chatwidgetlanguages
DisplayCollectionName	Chat Widget Languages
DisplayName	Chat Widget Language
EntitySetName	msdyn_chatwidgetlanguages
IsBPFEntity	False
LogicalCollectionName	msdyn_chatwidgetlanguages
LogicalName	msdyn_chatwidgetlanguage

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_chatwidgetlanguageid
PrimaryNameAttribute	msdyn_languagename
SchemaName	msdyn_chatwidgetlanguage

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_chatwidgetlanguageId
- msdyn_languagename
- msdyn_localeid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_chatwidgetlanguageId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Chat Widget Language
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_chatwidgetlanguageid
RequiredLevel	SystemRequired

Property	Value
Type	Uniqueidentifier

msdyn_languagename

Property	Value
Description	The language name of the record.
DisplayName	Language Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_languagename
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_localeid

Property	Value
Description	The Locale ID of the language this record represents.
DisplayName	Locale ID
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_localeid
MaxValue	100000
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None

Property	Value
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Chat Widget Language
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active

Value	Label	DefaultStatus	InvariantName
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Chat Widget Language
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.

Property	Value
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_chatwidgetlanguage_msdyn_livechatconfig_WidgetLocale

Same as msdyn_livechatconfig entity msdyn_msdyn_chatwidgetlanguage_msdyn_livechatconfig_WidgetLocale Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_livechatconfig
ReferencingAttribute	msdyn_widgetlocale
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_chatwidgetlanguage_msdyn_livechatconfig_WidgetLocale
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_consoleapplicationsessiontemplate Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Channel API Integration Framework Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_consoleapplicationsessiontemplates(*msdyn_consoleapplicationsessiontemplateid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_consoleapplicationsessiontemplates See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_consoleapplicationsessiontemplates(*msdyn_consoleapplicationsessiontemplateid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessReque
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransiti
ModifyAccess	ModifyAccess Action	ModifyAccessRequ
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_consoleapplicationsessiontemplates(*msdyn_consoleapplicationsessiontemplateid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_consoleapplicationsessiontemplates See Query Data	RetrieveMultipleRe RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAc
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrin
RevokeAccess	RevokeAccess Action	RevokeAccessRequ
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_consoleapplicationsessiontemplates(*msdyn_consoleapplicationsessiontemplateid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_consoleapplicationsessiontemplates(*msdyn_consoleapplicationsessiontemplateid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_consoleapplicationsessiontemplates
DisplayCollectionName	Session Templates
DisplayName	Session Templates
EntitySetName	msdyn_consoleapplicationsessiontemplates
IsBPFEntity	False
LogicalCollectionName	msdyn_consoleapplicationsessiontemplates
LogicalName	msdyn_consoleapplicationsessiontemplate
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_consoleapplicationsessiontemplateid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_consoleapplicationsessiontemplate

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_AnchorTab
- msdyn_consoleapplicationsessiontemplateId
- msdyn_description
- msdyn_enablebuildexpression
- msdyn_expressiondata
- msdyn_icon
- msdyn_IsPanelHidden
- msdyn_name
- msdyn_PanelState
- msdyn_Pinned
- msdyn_RenderingOrder
- msdyn_Title
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_AnchorTab

Property	Value
Description	The anchor tab for this session.
DisplayName	Anchor tab
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_anchortab
RequiredLevel	ApplicationRequired
Targets	msdyn_consoleapplicationtemplate
Type	Lookup

msdyn_consoleapplicationsessiontemplateId

Property	Value
Description	Unique identifier for entity instances.
DisplayName	Session Template Id
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_consoleapplicationsessiontemplateid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_description

Property	Value
Description	Description of the field
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_enablebuildexpression

Added by: Agent scripts Solution

Property	Value
Description	Unique value to enable or disable build expression
DisplayName	Enable build expression
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablebuildexpression
RequiredLevel	None
Type	Boolean

msdyn_enablebuildexpression Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_expressiondata

Added by: Agent scripts Solution

Property	Value
Description	Stores expression JSON
DisplayName	Expression data
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_expressiondata
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_icon

Property	Value
Description	Display icon for the session.
DisplayName	Icon
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_icon
MaxLength	100
RequiredLevel	None
Type	String

msdyn_IsPanelHidden

Property	Value
Description	Whether to render the sidepanel for this session
DisplayName	IsPanelHidden
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_ispanelhidden
RequiredLevel	None
Type	Boolean

msdyn_IsPanelHidden Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	Name of the session.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_PanelState

Property	Value
Description	Panel mode when a session is opened.
DisplayName	Communication panel mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_panelstate
RequiredLevel	None
Type	Picklist

msdyn_PanelState Options

Value	Label
100000000	Docked
100000001	Minimized
100000002	Hidden

msdyn_Pinned

Property	Value
Description	Whether this session should be pinned.
DisplayName	Pinned
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_pinned
RequiredLevel	None
Type	Boolean

msdyn_Pinned Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_RenderingOrder

Property	Value
Description	The relative order of all session templates.
DisplayName	Session order
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_renderingorder
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_Title

Property	Value
Description	Title of the session displayed in the session panel.
DisplayName	Session title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_title
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner who created this session.
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Session template
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the ConsoleApplicationSessionTemplate
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_AnchorTabName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon

Property	Value
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_AnchorTabName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_anchortabname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_consoleapplicationsessiontemplate_msdyn_scenario_SessionTemplate

Added by: Scenarios and Channels Solution

Same as msdyn_scenario entity msdyn_msdyn_consoleapplicationsessiontemplate_msdyn_scenario_SessionTemplate Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_scenario
ReferencingAttribute	msdyn_sessiontemplate

Property	Value
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_consoleapplicationsessiontemplate_msdyn_scenario_SessionTemplate
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-Many Relationships

Relationship details provided where the msdyn_consoleapplicationsessiontemplate entity is the first entity in the relationship. Listed by **SchemaName**.

msdyn_msdyn_agentscript_msdyn_sessiontemplate

See msdyn_agentscript Entity msdyn_msdyn_agentscript_msdyn_sessiontemplate Many-To-Many Relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_conversationaction Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The action that can be performed in the conversation.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationactions(*msdyn_conversationactionid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_conversationactions See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_conversationactions(*msdyn_conversationactionid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_conversationactions(*msdyn_conversationactionid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_conversationactions See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationactions(*msdyn_conversationactionid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationactions(*msdyn_conversationactionid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Entity Properties

Property	Value
CollectionSchemaName	msdyn_conversationactions
DisplayCollectionName	Conversation Action
DisplayName	Conversation Action
EntitySetName	msdyn_conversationactions

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_conversationactions
LogicalName	msdyn_conversationaction
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_conversationactionid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_conversationaction

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_conversationactionId
- msdyn_EventName
- msdyn_EventParameter
- msdyn_FunctionName
- msdyn_Icon
- msdyn_name
- msdyn_Order
- msdyn_WebResource
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_conversationactionId

Property	Value

Property	Value
Description	Unique identifier for entity instances
DisplayName	Conversation Action
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_conversationactionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_EventName

Property	Value
Description	Action event name option set
DisplayName	Event Name
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventname
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_EventName Options

Value	Label
100000000	Open App Tab Template
100000001	Send message
100000002	Customer Defined Function

msdyn_EventParameter

Property	Value
Description	Parameters that can be passed thorugh the event
DisplayName	Event Parameter
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventparameter
MaxLength	100
RequiredLevel	None
Type	String

msdyn_FunctionName

Property	Value
Description	Web resources main function name
DisplayName	Function Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_functionname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Icon

Property	Value
Description	Icon for the conversation action button
DisplayName	Icon
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_icon
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_Order

Property	Value
Description	Order for the conversation action button
DisplayName	Order
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_order
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_WebResource

Property	Value
Description	Web resources to load for the conversation action
DisplayName	Web Resource
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_webresource
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Conversation Action
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value

Property	Value
Description	Reason for the status of the Conversation Action
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.

Property	Value
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number

Property	Value
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_msdyn_conversationaction_msdyn_channelcapability_ConversationAction
- msdyn_msdyn_conversationaction_msdyn_conversationactionlocale_CAkey

msdyn_msdyn_conversationaction_msdyn_channelcapability_ConversationAction

Same as msdyn_channelcapability entity msdyn_msdyn_conversationaction_msdyn_channelcapability_ConversationAction Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_channelcapability
ReferencingAttribute	msdyn_conversationaction
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_conversationaction_msdyn_channelcapability_ConversationAction
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_conversationaction_msdyn_conversationactionlocale_CAkey

Same as msdyn_conversationactionlocale entity msdyn_msdyn_conversationaction_msdyn_conversationactionlocale_CAkey Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_conversationactionlocale
ReferencingAttribute	msdyn_conversationactionkey
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_conversationaction_msdyn_conversationactionlocale_CAkey

Property	Value
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_conversationactionlocale Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Localization information associated with the Conversation action.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationactionlocales(*msdyn_conversationactionlocaleid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_conversationactionlocales See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_conversationactionlocales(*msdyn_conversationactionlocaleid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_conversationactionlocales(*msdyn_conversationactionlocaleid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_conversationactionlocales See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRe
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationactionlocales(*msdyn_conversationactionlocaleid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationactionlocales(*msdyn_conversationactionlocaleid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Entity Properties

Property	Value
CollectionSchemaName	msdyn_conversationactionlocales
DisplayCollectionName	Conversation Action Locale
DisplayName	Conversation Action Locale
EntitySetName	msdyn_conversationactionlocales
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_conversationactionlocales
LogicalName	msdyn_conversationactionlocale
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_conversationactionlocaleid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_conversationactionlocale

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_Conversationactionkey
- msdyn_conversationactionlocaleId
- msdyn_Label
- msdyn_Locale_picklist
- msdyn_name
- msdyn_SlashCommands
- msdyn_Tooltip
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_Conversationactionkey

Property	Value
Description	Conversation action Id
DisplayName	Conversation Action key
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_conversationactionkey
RequiredLevel	ApplicationRequired
Targets	msdyn_conversationaction
Type	Lookup

msdyn_conversationactionlocaleId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Conversation Action Locale
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_conversationactionlocaleid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Label

Property	Value
Description	Label string for conversation action button
DisplayName	Label
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_label
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_Locale_picklist

Property	Value
Description	Locale code for conversation action UI strings
DisplayName	Locale
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_locale_picklist
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_Locale_picklist Options

Value	Label
1025	ar-SA
1026	bg-BG
1027	ca-ES
1028	zh-TW
1029	cs-CZ
1030	da-DK
1031	de-DE
1032	el-GR
1033	en-US
1035	fi-FI
1036	fr-FR
1037	he-IL
1038	hu-HU
1040	it-IT
1041	ja-JP
1042	ko-KR
1043	nl-NL
1044	nb-NO
1045	pl-PL
1046	pt-BR
1048	ro-RO
1049	ru-RU
1050	hr-HR
1051	sk-SK
1053	sv-SE
1054	th-TH
1055	tr-TR
1057	id-ID
1058	uk-UA
1060	sl-SI
1061	et-EE
1062	lv-LV
1063	lt-LT
1066	vi-VN
1069	eu-ES
1081	hi-IN
1086	ms-MY
1087	kk-KZ
1110	gl-ES

Value	Label
2052	zh-CN
2070	pt-PT
2074	sr-Latn-CS
3076	zh-HK
3082	es-ES
3098	sr-Cyrl-CS

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_SlashCommands

Property	Value
Description	Slash commad string for conversation action button
DisplayName	Slash Commands
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_slashcommands
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Tooltip

Property	Value
Description	Tooltip for Conversation Action
DisplayName	Tooltip
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_tooltip
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype

Property	Value
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Conversation Action Locale
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Conversation Action Locale
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_conversationactionkeyName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_conversationactionkeyName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_conversationactionkeyname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_conversationaction_msdyn_conversationactionlocale_CAkey

See msdyn_conversationaction Entity msdyn_msdyn_conversationaction_msdyn_conversationactionlocale_CAkey One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_conversationmessageblock table

Article • 08/08/2023

A Message Block would constitute a block of messages up till an agent responds (including the messages sent by the agent). A follow up message, after an agent responds, will create another message block, this block again ends with the messages from the agent.

> **Note**
>
> You can only use this table to enable change tracking. You can't customize this table.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationmessageblocks(*msdyn_conversationmessageblockid*) Update `ownerid` property.	AssignRequest
BulkRetain	BulkRetain Action	Microsoft.Crm.Sdk.Messages.BulkR
Create	POST [*org URI*]/api/data/v9.0/msdyn_conversationmessageblocks See Create	CreateRequest or Create
CreateMultiple	CreateMultiple Action	CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_conversationmessageblocks(*msdyn_conversationmessageblockid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
PurgeRetainedContent	PurgeRetainedContent Action	Microsoft.Crm.Sdk.Messages.Purge
Retain	Retain Action	Microsoft.Crm.Sdk.Messages.Retai
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_conversationmessageblocks(*msdyn_conversationmessageblockid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_conversationmessageblocks See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcces
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
RollbackRetain	RollbackRetain Action	Microsoft.Crm.Sdk.Messages.Rollb
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationmessageblocks(*msdyn_conversationmessageblockid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationmessageblocks(*msdyn_conversationmessageblockid*) See Update	UpdateRequest or Update
UpdateMultiple	UpdateMultiple Action	UpdateMultipleRequest
ValidateRetentionConfig	ValidateRetentionConfig Action	Microsoft.Crm.Sdk.Messages.Valida

Properties

Property	Value
CollectionSchemaName	msdyn_conversationmessageblocks
DisplayCollectionName	msdyn_conversationmessageblock
DisplayName	Conversation Message Block
EntitySetName	msdyn_conversationmessageblocks
IsBPFEntity	False
LogicalCollectionName	msdyn_conversationmessageblocks
LogicalName	msdyn_conversationmessageblock
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_conversationmessageblockid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_conversationmessageblock

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_agentid
- msdyn_agentmessagetime
- msdyn_agentresponsesessionid
- msdyn_agentresponsetimeadjforoh
- msdyn_agentresponsetimenotadjforoh
- msdyn_conversationmessageblockId
- msdyn_customermessagesessionid
- msdyn_customermessagetimestamp
- msdyn_inboundmessagecountoutsideoh
- msdyn_inboundmessagecountwithinoh
- msdyn_isfirstresponsetime
- msdyn_name
- msdyn_ocliveworkitemid
- msdyn_outboundmessagecountoutsideoh
- msdyn_outboundmessagecountwithinoh
- msdyn_responsetimeadjforoh
- msdyn_responsetimenotadjforoh
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_agentid

Property	Value
Description	Id of Agent who first responded to customer in this message block
DisplayName	Agent Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_agentmessagetime

Property	Value
DateTimeBehavior	UserLocal
Description	Timestamp of first message sent by agent within a message block. Each message block record is a summary of consecutive messages sent by customer and agent's response to the same
DisplayName	Agent message time
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentmessagetime
RequiredLevel	None
Type	DateTime

msdyn_agentresponsesessionid

Property	Value
Description	Agent response session identifier. The session in which agent responded to the customer's message within this message block
DisplayName	Agent response session identifier
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentresponsesessionid
RequiredLevel	None
Targets	msdyn_ocsession
Type	Lookup

msdyn_agentresponsetimeadjforoh

Property	Value
Description	Time it took for the agent to respond to the customer from the time agent accepted the session., excluding agent's out of operating hours (OOOH)
DisplayName	Agent response time adjusted for operating hours.
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentresponsetimeadjforoh
MaxValue	100000000000
MinValue	-100000000000
Precision	2
RequiredLevel	None
Type	Decimal

msdyn_agentresponsetimenotadjforoh

Property	Value
Description	Time it took for the agent to respond to the customer from the time agent accepted the session, including agent's out of operating hours (OOOH)
DisplayName	Agent response time not adjusted for OH
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentresponsetimenotadjforoh
MaxValue	100000000000
MinValue	-100000000000
Precision	2
RequiredLevel	None
Type	Decimal

msdyn_conversationmessageblockId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Conversation Message Blocks
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_conversationmessageblockid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_customermessagesessionid

Property	Value
Description	Customer message session identifier. The session in which customer sent the message within this message block
DisplayName	Customer message session identifier
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customermessagesessionid
RequiredLevel	None
Targets	msdyn_ocsession
Type	Lookup

msdyn_customermessagetimestamp

Property	Value
DateTimeBehavior	UserLocal
Description	Customer Message Session timestamp. Timestamp of first customer message within this message block
DisplayName	Customer message time
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customermessagetimestamp
RequiredLevel	None
Type	DateTime

msdyn_inboundmessagecountoutsideoh

Property	Value
Description	Number of messages from customer to agent outside the agent's operating hours
DisplayName	In message outside OH
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_inboundmessagecountoutsideoh
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_inboundmessagecountwithinoh

Property	Value
Description	Number of messages from customer to agent within the agent's operating hours
DisplayName	In message within OH
Format	None
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_inboundmessagecountwithinoh
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_isfirstresponsetime

Property	Value
Description	Indicates if this message block contains the first response time for the conversation
DisplayName	Is first response time
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isfirstresponsetime
RequiredLevel	None
Type	Boolean

msdyn_isfirstresponsetime Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocliveworkitemid

Property	Value
Description	Conversation Id

Property	Value
DisplayName	Conversation Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_outboundmessagecountoutsideoh

Property	Value
Description	Number of messages from agent to customer outside the agent's operating hours
DisplayName	Outbound message outside operating hours
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_outboundmessagecountoutsideoh
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_outboundmessagecountwithinoh

Property	Value
Description	Number of messages from agent to customer within the agent's operating hours
DisplayName	Outboud message within operating hours
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_outboundmessagecountwithinoh
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_responsetimeadjforoh

Property	Value
Description	Time it took to respond to customer, excluding agent's out of operating hours (OOOH)
DisplayName	Response time adjusted for OH
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_responsetimeadjforoh
MaxValue	100000000000
MinValue	-100000000000
Precision	2
RequiredLevel	None
Type	Decimal

msdyn_responsetimenotadjforoh

Property	Value
Description	Time it took to respond to customer, including agent's out of operating hours
DisplayName	Response time not adjusted for OH
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_responsetimenotadjforoh
MaxValue	100000000000
MinValue	-100000000000
Precision	2
RequiredLevel	None
Type	Decimal

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Conversation Message Blocks
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Conversation Message Blocks
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode

Property	Value
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy

- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_agentidName
- msdyn_agentidYomiName
- msdyn_agentresponsesessionidName
- msdyn_customermessagesessionidName
- msdyn_ocliveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_agentidName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_agentidYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_agentresponsesessionidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentresponsesessionidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_customermessagesessionidName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customermessagesessionidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_ocliveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record

Property	Value
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_conversationmessageblock_SyncErrors
- msdyn_conversationmessageblock_DuplicateMatchingRecord
- msdyn_conversationmessageblock_DuplicateBaseRecord
- msdyn_conversationmessageblock_AsyncOperations
- msdyn_conversationmessageblock_MailboxTrackingFolders
- msdyn_conversationmessageblock_UserEntityInstanceDatas

- msdyn_conversationmessageblock_ProcessSession
- msdyn_conversationmessageblock_BulkDeleteFailures
- msdyn_conversationmessageblock_PrincipalObjectAttributeAccesses

msdyn_conversationmessageblock_SyncErrors

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_SyncErrors Many-To-One relationship.

Property	Value
ReferencingEntity	syncerror
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_SyncErrors
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_conversationmessageblock_DuplicateMatchingRecord

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_DuplicateMatchingRecord Many-To-One relationship.

Property	Value
ReferencingEntity	duplicaterecord
ReferencingAttribute	duplicaterecordid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_DuplicateMatchingRecord
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_conversationmessageblock_DuplicateBaseRecord

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_DuplicateBaseRecord Many-To-One relationship.

Property	Value
ReferencingEntity	duplicaterecord
ReferencingAttribute	baserecordid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_DuplicateBaseRecord
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_conversationmessageblock_AsyncOperations

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_AsyncOperations Many-To-One relationship.

Property	Value
ReferencingEntity	asyncoperation
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_AsyncOperations
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_conversationmessageblock_MailboxTrackingFolders

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_MailboxTrackingFolders Many-To-One relationship.

Property	Value
ReferencingEntity	mailboxtrackingfolder
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_MailboxTrackingFolders
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details

Property	Value
	Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_conversationmessageblock_UserEntityInstanceDatas

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_UserEntityInstanceDatas Many-To-One relationship.

Property	Value
ReferencingEntity	userentityinstancedata
ReferencingAttribute	objectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_UserEntityInstanceDatas
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_conversationmessageblock_ProcessSession

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_ProcessSession Many-To-One relationship.

Property	Value
ReferencingEntity	processsession
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_ProcessSession
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_conversationmessageblock_BulkDeleteFailures

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_BulkDeleteFailures Many-To-One relationship.

Property	Value
ReferencingEntity	bulkdeletefailure
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_BulkDeleteFailures
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_conversationmessageblock_PrincipalObjectAttributeAccesses

Added by: System Solution Solution

Same as msdyn_conversationmessageblock_PrincipalObjectAttributeAccesses Many-To-One relationship.

Property	Value
ReferencingEntity	principalobjectattributeaccess
ReferencingAttribute	objectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_conversationmessageblock_PrincipalObjectAttributeAccesses
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related table. Listed by **SchemaName**.

- lk_msdyn_conversationmessageblock_createdby
- lk_msdyn_conversationmessageblock_createdonbehalfby
- lk_msdyn_conversationmessageblock_modifiedby
- lk_msdyn_conversationmessageblock_modifiedonbehalfby
- user_msdyn_conversationmessageblock
- team_msdyn_conversationmessageblock
- business_unit_msdyn_conversationmessageblock
- msdyn_ocliveworkitem_msdyn_conversationmessageblock_msdyn_ocliveworkitemid
- msdyn_ocsession_msdyn_conversationmessageblock_msdyn_agentresponsesessionid

- msdyn_ocsession_msdyn_conversationmessageblock_msdyn_customermessagesessionid
- msdyn_systemuser_msdyn_conversationmessageblock_msdyn_agentid

lk_msdyn_conversationmessageblock_createdby

Added by: System Solution Solution

See lk_msdyn_conversationmessageblock_createdby One-To-Many relationship.

lk_msdyn_conversationmessageblock_createdonbehalfby

Added by: System Solution Solution

See lk_msdyn_conversationmessageblock_createdonbehalfby One-To-Many relationship.

lk_msdyn_conversationmessageblock_modifiedby

Added by: System Solution Solution

See lk_msdyn_conversationmessageblock_modifiedby One-To-Many relationship.

lk_msdyn_conversationmessageblock_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Table lk_msdyn_conversationmessageblock_modifiedonbehalfby One-To-Many relationship.

user_msdyn_conversationmessageblock

Added by: System Solution Solution

See systemuser Table user_msdyn_conversationmessageblock relationship.

team_msdyn_conversationmessageblock

Added by: System Solution Solution

See team Table team_msdyn_conversationmessageblock One-To-Many relationship.

business_unit_msdyn_conversationmessageblock

Added by: System Solution Solution

See businessunit Table business_unit_msdyn_conversationmessageblock One-To-Many relationship.

msdyn_ocliveworkitem_msdyn_conversationmessageblock_msdyn_ocliveworkitemid

Added by: Active Solution Solution

See msdyn_ocliveworkitem Table msdyn_ocliveworkitem_msdyn_conversationmessageblock_msdyn_ocliveworkitemid One-To-Many relationship.

msdyn_ocsession_msdyn_conversationmessageblock_msdyn_agentresponsesessionid

Added by: Active Solution Solution

See msdyn_ocsession Table msdyn_ocsession_msdyn_conversationmessageblock_msdyn_agentresponsesessionid One-To-Many relationship.

msdyn_ocsession_msdyn_conversationmessageblock_msdyn_customermessagesessionid

Added by: Active Solution Solution

See msdyn_ocsession Table msdyn_ocsession_msdyn_conversationmessageblock_msdyn_customermessagesessionid One-To-Many relationship.

msdyn_systemuser_msdyn_conversationmessageblock_msdyn_agentid

Added by: System Solution Solution

See systemuser Table msdyn_systemuser_msdyn_conversationmessageblock_msdyn_agentid One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_conversationsuggestionrequestpayload Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Conversation Suggestion Request Payload

Added by: OmnichannelIntelligence Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_conversationsuggestionrequestpayloads See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_conversationsuggestionrequestpayloads(*msdyn_conversationsuggestionrequestpayloadid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRe
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_conversationsuggestionrequestpayloads(*msdyn_conversationsuggestionrequestpayloadid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_conversationsuggestionrequestpayloads See Query Data	RetrieveMultipleRequest RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationsuggestionrequestpayloads(*msdyn_conversationsuggestionrequestpayloadid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_conversationsuggestionrequestpayloads(*msdyn_conversationsuggestionrequestpayloadid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_conversationsuggestionrequestpayloads
DisplayCollectionName	conversationsuggestionsrequestpayload
DisplayName	conversationsuggestionrequestpayload
EntitySetName	msdyn_conversationsuggestionrequestpayloads
IsBPFEntity	False
LogicalCollectionName	msdyn_conversationsuggestionrequestpayloads
LogicalName	msdyn_conversationsuggestionrequestpayload
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_conversationsuggestionrequestpayloadid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_conversationsuggestionrequestpayload

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_conversationid
- msdyn_conversationsuggestionrequestpayloadId
- msdyn_name
- msdyn_requestpayload
- msdyn_responsepayload
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_conversationid

Property	Value
Description	Unique identifier for Conversation associated with conversationsuggestionrequestpayload.
DisplayName	conversationid
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_conversationid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_conversationsuggestionrequestpayloadId

Property	Value
Description	Unique identifier for entity instances
DisplayName	conversationsuggestionrequestpayload
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	msdyn_conversationsuggestionrequestpayloadid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_requestpayload

Property	Value
Description	Request Payload
DisplayName	requestpayload
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_requestpayload
MaxLength	9999
RequiredLevel	ApplicationRequired
Type	Memo

msdyn_responsepayload

Property	Value
Description	Response Payload
DisplayName	Response Payload
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_responsepayload
MaxLength	9999

Property	Value
RequiredLevel	ApplicationRequired
Type	Memo

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the conversationsuggestionrequestpayload
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the conversationsuggestionrequestpayload
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None

Property	Value
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName

- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_conversationidName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_conversationidName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_conversationidname
MaxLength	200
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number

Property	Value
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_copilotinteraction table

Article • 09/11/2023

Entity to save interactions.

Added by: msdyn_CSIntelligence Solution

Messages

Message	Web API Operation	SDK Assembly
BulkRetain	BulkRetain Action	Microsoft.Crm.Sdk.Messages.BulkRetainRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_copilotinteractions See Create	CreateRequest or Create
CreateMultiple	CreateMultiple Action	CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_copilotinteractions(*msdyn_copilotinteractionid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
PurgeRetainedContent	PurgeRetainedContent Action	Microsoft.Crm.Sdk.Messages.PurgeRetainedContentRequest
Retain	Retain Action	Microsoft.Crm.Sdk.Messages.RetainRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_copilotinteractions(*msdyn_copilotinteractionid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_copilotinteractions See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RollbackRetain	RollbackRetain Action	Microsoft.Crm.Sdk.Messages.RollbackRetainRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_copilotinteractions(*msdyn_copilotinteractionid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_copilotinteractions(*msdyn_copilotinteractionid*) See Update	UpdateRequest or Update
UpdateMultiple	UpdateMultiple Action	UpdateMultipleRequest
ValidateRetentionConfig	ValidateRetentionConfig Action	Microsoft.Crm.Sdk.Messages.ValidateRetentionConfigRequest

Properties

Property	Value
CollectionSchemaName	msdyn_copilotinteractions
DisplayCollectionName	Copilot Interactions
DisplayName	Copilot Interaction
EntitySetName	msdyn_copilotinteractions
IsBPFEntity	False
LogicalCollectionName	msdyn_copilotinteractions
LogicalName	msdyn_copilotinteraction
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_copilotinteractionid
PrimaryNameAttribute	msdyn_name

Property	Value
SchemaName	msdyn_copilotinteraction

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_clienttimestamp
- msdyn_copilotinteractionId
- msdyn_interactioncontext
- msdyn_interactiondataid
- msdyn_interactionforid
- msdyn_interactionforlogicalname
- msdyn_interactiontype
- msdyn_name
- msdyn_scenariorequestid
- msdyn_scenariotype
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_clienttimestamp

Property	Value
DateTimeBehavior	UserLocal
Description	Utc Timestamp from client
DisplayName	Client Timestamp
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_clienttimestamp

Property	Value
RequiredLevel	None
Type	DateTime

msdyn_copilotinteractionId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Copilot Interaction
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_copilotinteractionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_interactioncontext

Property	Value
Description	
DisplayName	Interaction Context
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_interactioncontext
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_interactiondataid

Property	Value
Description	
DisplayName	Interaction Data Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_interactiondataid
RequiredLevel	None
Targets	msdyn_copilotinteractiondata
Type	Lookup

msdyn_interactionforid

Property	Value
Description	
DisplayName	Interaction For Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_interactionforid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_interactionforlogicalname

Property	Value
Description	
DisplayName	Interaction For Logical Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_interactionforlogicalname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_interactiontype

Property	Value
Description	
DisplayName	Interaction Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_interactiontype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_interactiontype Choices/Options

Value	Label
100230301	ThumbsUp
100230302	ThumbsDown
100230303	ThumbsClear

Value	Label
100230304	Copy
100230305	Generated
100230306	SendToCustomer
100230307	EditAndSend
100230308	ManualCopy
100230309	Available

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_scenariorequestid

Property	Value
Description	
DisplayName	Scenario Request Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_scenariorequestid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_scenariotype

Property	Value
Description	
DisplayName	Scenario Type
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_scenariotype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_scenariotype Choices/Options

Value	Label
100230201	Ask a question
100230202	Live conversation response
100230203	Write an email
100230204	Copilot
100230205	Case summary
100230206	Live conversation summary

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Copilot Interaction
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active

Value	Label	DefaultStatus	InvariantName
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Copilot Interaction
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1

Property	Value
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_interactiondataidName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_interactiondataidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_interactiondataidname
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Enable Copilot features in Customer Service (preview)

msdyn_copilotinteractiondata table

Article • 09/11/2023

Entity to Store the actual interaction data.

Added by: msdyn_CSIntelligence Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_copilotinteractiondatas(*msdyn_copilotinteractiondataid*) Update `ownerid` property.	AssignRequest
BulkRetain	BulkRetain Action	Microsoft.Crm.Sdk.Messages.BulkRetainReq
Create	POST [*org URI*]/api/data/v9.0/msdyn_copilotinteractiondatas See Create	CreateRequest or Create
CreateMultiple	CreateMultiple Action	CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_copilotinteractiondatas(*msdyn_copilotinteractiondataid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
PurgeRetainedContent	PurgeRetainedContent Action	Microsoft.Crm.Sdk.Messages.PurgeRetained
Retain	Retain Action	Microsoft.Crm.Sdk.Messages.RetainRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_copilotinteractiondatas(*msdyn_copilotinteractiondataid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_copilotinteractiondatas See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
RollbackRetain	RollbackRetain Action	Microsoft.Crm.Sdk.Messages.RollbackRetain
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_copilotinteractiondatas(*msdyn_copilotinteractiondataid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_copilotinteractiondatas(*msdyn_copilotinteractiondataid*) See Update	UpdateRequest or Update
UpdateMultiple	UpdateMultiple Action	UpdateMultipleRequest
ValidateRetentionConfig	ValidateRetentionConfig Action	Microsoft.Crm.Sdk.Messages.ValidateRetent

Properties

Property	Value
CollectionSchemaName	msdyn_copilotinteractiondatas
DisplayCollectionName	Copilot Interaction Datas
DisplayName	Copilot Interaction Data

Property	Value
EntitySetName	msdyn_copilotinteractiondatas
IsBPFEntity	False
LogicalCollectionName	msdyn_copilotinteractiondatas
LogicalName	msdyn_copilotinteractiondata
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_copilotinteractiondataid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_copilotinteractiondata

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_copilotinteractiondataId
- msdyn_name
- msdyn_verbatim
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_copilotinteractiondataId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Copilot Interaction Data
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	msdyn_copilotinteractiondataid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_verbatim

Property	Value
Description	
DisplayName	Verbatim
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_verbatim
MaxLength	2000
RequiredLevel	None
Type	Memo

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Copilot Interaction Data
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Copilot Interaction Data
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_interactiondata_Name
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.

Property	Value
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.

Property	Value
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.

Property	Value
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_interactiondata_Name

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_interactiondata_name
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Enable Copilot features in Customer Service (preview)
Web API Reference

msdyn_copilottranscript table

Article • 09/11/2023

Entity to save transcript activity.

Added by: msdyn_CSIntelligence Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_copilottranscripts(*activityid*) Update `ownerid` property.	Microsoft.Crm.Sdk.Messages.AssignRequest
BulkRetain	BulkRetain Action	Microsoft.Crm.Sdk.Messages.BulkRetainRequest>
Create	POST [*org URI*]/api/data/v9.0/msdyn_copilottranscripts See Create	CreateRequest or Create
CreateMultiple	CreateMultiple Action	CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_copilottranscripts(*activityid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
PurgeRetainedContent	PurgeRetainedContent Action	Microsoft.Crm.Sdk.Messages.PurgeRetainedContentRequest
Retain	Retain Action	Microsoft.Crm.Sdk.Messages.RetainRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_copilottranscripts(*activityid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_copilottranscripts See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
RollbackRetain	RollbackRetain Action	Microsoft.Crm.Sdk.Messages.RollbackRetainRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_copilottranscripts(*activityid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_copilottranscripts(*activityid*) See Update	UpdateRequest or Update
UpdateMultiple	UpdateMultiple Action	UpdateMultipleRequest
ValidateRetentionConfig	ValidateRetentionConfig Action	Microsoft.Crm.Sdk.Messages.ValidateRetentionConfigRequest

Properties

Property	Value
CollectionSchemaName	msdyn_copilottranscripts
DisplayCollectionName	Copilot Transcripts
DisplayName	Copilot Transcript

Property	Value
EntitySetName	msdyn_copilottranscripts
IsBPFEntity	False
LogicalCollectionName	msdyn_copilottranscripts
LogicalName	msdyn_copilottranscript
OwnershipType	UserOwned
PrimaryIdAttribute	activityid
PrimaryNameAttribute	subject
SchemaName	msdyn_copilottranscript

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ActivityAdditionalParams
- ActivityId
- ActualDurationMinutes
- ActualEnd
- ActualStart
- BCC
- CC
- Community
- Customers
- DeliveryPriorityCode
- Description
- ExchangeItemId
- ExchangeWebLink
- From
- ImportSequenceNumber
- IsBilled
- IsMapiPrivate
- IsWorkflowCreated
- LastOnHoldTime
- LeftVoiceMail
- msdyn_additionalcontext
- msdyn_transcriptforid
- msdyn_transcriptforlogicalname
- OptionalAttendees
- Organizer
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- Partners
- PriorityCode
- ProcessId
- RegardingObjectId
- RegardingObjectIdName
- RegardingObjectIdYomiName
- RegardingObjectTypeCode
- RequiredAttendees
- Resources
- ScheduledDurationMinutes
- ScheduledEnd
- ScheduledStart
- ServiceId
- SLAId
- SortDate

- StageId
- StateCode
- StatusCode
- Subject
- TimeZoneRuleVersionNumber
- To
- TransactionCurrencyId
- TraversedPath
- UTCConversionTimeZoneCode

ActivityAdditionalParams

Property	Value
Description	Additional information provided by the external application as JSON. For internal use only.
DisplayName	Activity Additional Parameters
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	activityadditionalparams
MaxLength	8192
RequiredLevel	None
Type	Memo

ActivityId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the activity.
DisplayName	Activity
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	activityid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ActualDurationMinutes

Property	Value
Description	Actual duration of the activity in minutes.
DisplayName	Actual Duration
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	actualdurationminutes

Property	Value
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

ActualEnd

Property	Value
DateTimeBehavior	UserLocal
Description	Actual end time of the activity.
DisplayName	Actual End
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	actualend
RequiredLevel	None
Type	DateTime

ActualStart

Property	Value
DateTimeBehavior	UserLocal
Description	Actual start time of the activity.
DisplayName	Actual Start
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	actualstart
RequiredLevel	None
Type	DateTime

BCC

Added by: Active Solution Solution

Property	Value
Description	Blind Carbon-copy (bcc) recipients of the activity.
DisplayName	BCC
IsValidForForm	True
IsValidForRead	True
LogicalName	bcc
RequiredLevel	None
Targets	account,contact,lead,systemuser

Property	Value
Type	PartyList

CC

Added by: Active Solution Solution

Property	Value
Description	Carbon-copy (cc) recipients of the activity.
DisplayName	CC
IsValidForForm	True
IsValidForRead	True
LogicalName	cc
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

Community

Property	Value
Description	Shows how contact about the social activity originated, such as from Twitter or Facebook. This field is read-only.
DisplayName	Social Channel
IsValidForForm	False
IsValidForRead	True
LogicalName	community
RequiredLevel	None
Type	Picklist

Community Choices/Options

Value	Label
0	Other
1	Facebook
2	Twitter
3	Line
4	Wechat
5	Cortana
6	Direct Line
7	Microsoft Teams
8	Direct Line Speech
9	Email
10	GroupMe
11	Kik
12	Telegram
13	Skype

Value	Label
14	Slack
15	WhatsApp
16	Apple Messages For Business
17	Google's Business Messages

Customers

Added by: Active Solution Solution

Property	Value
Description	Customer with which the activity is associated.
DisplayName	Customers
IsValidForForm	True
IsValidForRead	True
LogicalName	customers
RequiredLevel	None
Targets	account,contact
Type	PartyList

DeliveryPriorityCode

Property	Value
Description	Priority of delivery of the activity to the email server.
DisplayName	Delivery Priority
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	deliveryprioritycode
RequiredLevel	None
Type	Picklist

DeliveryPriorityCode Choices/Options

Value	Label
0	Low
1	Normal
2	High

Description

Property	Value
Description	Description of the activity.
DisplayName	Description
Format	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	description
MaxLength	2000
RequiredLevel	None
Type	Memo

ExchangeItemId

Property	Value
Description	The message id of activity which is returned from Exchange Server.
DisplayName	Exchange Item ID
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	exchangeitemid
MaxLength	200
RequiredLevel	None
Type	String

ExchangeWebLink

Property	Value
Description	Shows the web link of Activity of type email.
DisplayName	Exchange WebLink
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	exchangeweblink
MaxLength	1250
RequiredLevel	None
Type	String

From

Added by: Active Solution Solution

Property	Value
Description	Person who the activity is from.
DisplayName	From
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	from
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsBilled

Property	Value
Description	Information regarding whether the activity was billed as part of resolving a case.
DisplayName	Is Billed
IsValidForForm	False
IsValidForRead	True
LogicalName	isbilled
RequiredLevel	None
Type	Boolean

IsBilled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsMapiPrivate

Property	Value
Description	For internal use only.

Property	Value
DisplayName	Is Private
IsValidForForm	False
IsValidForRead	True
LogicalName	ismapiprivate
RequiredLevel	None
Type	Boolean

IsMapiPrivate Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsWorkflowCreated

Property	Value
Description	Information regarding whether the activity was created from a workflow rule.
DisplayName	Is Workflow Created
IsValidForForm	False
IsValidForRead	True
LogicalName	isworkflowcreated
RequiredLevel	None
Type	Boolean

IsWorkflowCreated Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

LastOnHoldTime

Added by: Active Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	Contains the date and time stamp of the last on hold time.
DisplayName	Last On Hold Time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	lastonholdtime

Property	Value
RequiredLevel	None
Type	DateTime

LeftVoiceMail

Property	Value
Description	Left the voice mail
DisplayName	Left Voice Mail
IsValidForForm	True
IsValidForRead	True
LogicalName	leftvoicemail
RequiredLevel	None
Type	Boolean

LeftVoiceMail Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_additionalcontext

Property	Value
Description	
DisplayName	Additional Context
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_additionalcontext
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_transcriptforid

Property	Value
Description	
DisplayName	Transcript For Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_transcriptforid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_transcriptforlogicalname

Property	Value
Description	
DisplayName	Transcript For Logical Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_transcriptforlogicalname
MaxLength	100
RequiredLevel	None
Type	String

OptionalAttendees

Added by: Active Solution Solution

Property	Value
Description	List of optional attendees for the activity.
DisplayName	Optional Attendees
IsValidForForm	True
IsValidForRead	True
LogicalName	optionalattendees
RequiredLevel	None
Targets	account,contact,entitlement,equipment,knowledgearticle,lead,msdyn_salessuggestion,queue,systemuser,unresolvedaddress
Type	PartyList

Organizer

Added by: Active Solution Solution

Property	Value
Description	Person who organized the activity.
DisplayName	Organizer
IsValidForForm	True
IsValidForRead	True
LogicalName	organizer

Property	Value
RequiredLevel	None
Targets	systemuser
Type	PartyList

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user or team who owns the activity.
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

Partners

Added by: Active Solution Solution

Property	Value
Description	Outsource vendor with which activity is associated.
DisplayName	Outsource Vendors
IsValidForForm	True
IsValidForRead	True
LogicalName	partners
RequiredLevel	None
Targets	account,contact
Type	PartyList

PriorityCode

Property	Value
Description	Priority of the activity.
DisplayName	Priority
IsValidForForm	True
IsValidForRead	True
LogicalName	prioritycode
RequiredLevel	None
Type	Picklist

PriorityCode Choices/Options

Value	Label
0	Low
1	Normal
2	High

ProcessId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the Process.
DisplayName	Process
IsValidForForm	False
IsValidForRead	True
LogicalName	processid
RequiredLevel	None
Type	Uniqueidentifier

RegardingObjectId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the object with which the activity is associated.
DisplayName	Regarding
IsValidForForm	True
IsValidForRead	True
LogicalName	regardingobjectid
RequiredLevel	None
Targets	account,adx_invitation,bookableresourcebooking,bookableresourcebookingheader,bulkoperation,campaign,campaignactivity,contact,contract,entitler
Type	Lookup

RegardingObjectIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjectidname
MaxLength	400
RequiredLevel	None
Type	String

RegardingObjectIdYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjectidyominame
MaxLength	400
RequiredLevel	None
Type	String

RegardingObjectTypeCode

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjecttypecode
RequiredLevel	None
Type	EntityName

RequiredAttendees

Added by: Active Solution Solution

Property	Value
Description	List of required attendees for the activity.
DisplayName	Required Attendees
IsValidForForm	True
IsValidForRead	True
LogicalName	requiredattendees
RequiredLevel	None
Targets	account,contact,entitlement,equipment,knowledgearticle,lead,msdyn_salessuggestion,queue,systemuser,unresolvedaddress
Type	PartyList

Resources

Added by: Active Solution Solution

Property	Value
Description	Users or facility/equipment that are required for the activity.
DisplayName	Resources
IsValidForForm	True
IsValidForRead	True
LogicalName	resources
RequiredLevel	None
Targets	equipment,systemuser
Type	PartyList

ScheduledDurationMinutes

Property	Value
Description	Scheduled duration of the activity, specified in minutes.
DisplayName	Scheduled Duration
Format	Duration
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	scheduledurationminutes
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

ScheduledEnd

Property	Value
DateTimeBehavior	UserLocal
Description	Scheduled end time of the activity.
DisplayName	Due Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledend
RequiredLevel	None
Type	DateTime

ScheduledStart

Property	Value
DateTimeBehavior	UserLocal
Description	Scheduled start time of the activity.
DisplayName	Start Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledstart
RequiredLevel	None
Type	DateTime

ServiceId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of an associated service.
DisplayName	Service
IsValidForForm	False
IsValidForRead	True
LogicalName	serviceid
RequiredLevel	None
Targets	service

Property	Value
Type	Lookup

SLAId

Added by: Active Solution Solution

Property	Value
Description	Choose the service level agreement (SLA) that you want to apply to the case record.
DisplayName	SLA
IsValidForForm	True
IsValidForRead	True
LogicalName	slaid
RequiredLevel	None
Targets	sla
Type	Lookup

SortDate

Property	Value
DateTimeBehavior	UserLocal
Description	Shows the date and time by which the activities are sorted.
DisplayName	Sort Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	sortdate
RequiredLevel	None
Type	DateTime

StageId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the Stage.
DisplayName	(Deprecated) Process Stage
IsValidForForm	False
IsValidForRead	True
LogicalName	stageid
RequiredLevel	None
Type	Uniqueidentifier

StateCode

Property	Value
Description	Status of the activity.

Property	Value
DisplayName	Activity Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Open	1	Open
1	Completed	2	Completed
2	Canceled	3	Canceled
3	Scheduled	4	Scheduled

StatusCode

Property	Value
Description	Reason for the status of the activity.
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

StatusCode Choices/Options

Value	Label	State
1	Open	0
2	Completed	1
3	Canceled	2
4	Scheduled	3

Subject

Property	Value
Description	Subject associated with the activity.
DisplayName	Subject
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	subject
MaxLength	400
RequiredLevel	ApplicationRequired
Type	String

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

To

Added by: Active Solution Solution

Property	Value
Description	Person who is the receiver of the activity.
DisplayName	To
IsValidForForm	True
IsValidForRead	True
LogicalName	to
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

TransactionCurrencyId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the currency associated with the activitypointer.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid
RequiredLevel	None

Property	Value
Targets	transactioncurrency
Type	Lookup

TraversedPath

Added by: Active Solution Solution

Property	Value
Description	For internal use only.
DisplayName	(Deprecated) Traversed Path
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	traversedpath
MaxLength	1250
RequiredLevel	None
Type	String

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ActivityTypeCode
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- DeliveryLastAttemptedOn
- ExchangeRate
- InstanceTypeCode

- IsRegularActivity
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OnHoldTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- PostponeActivityProcessingUntil
- SenderMailboxId
- SenderMailboxIdName
- SentOn
- SeriesId
- ServiceIdName
- SLAInvokedId
- SLAInvokedIdName
- SLAName
- TransactionCurrencyIdName
- VersionNumber

ActivityTypeCode

Property	Value
Description	Type of activity.
DisplayName	Activity Type
IsValidForForm	False
IsValidForRead	True
LogicalName	activitytypecode
RequiredLevel	SystemRequired
Type	EntityName

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the activity.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was created.
DisplayName	Date Created
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the activitypointer.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

DeliveryLastAttemptedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the delivery of the activity was last attempted.
DisplayName	Date Delivery Last Attempted
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	deliverylastattemptedon
RequiredLevel	None
Type	DateTime

ExchangeRate

Added by: Active Solution Solution

Property	Value
Description	Exchange rate for the currency associated with the activitypointer with respect to the base currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.000000000001
Precision	12
RequiredLevel	None
Type	Decimal

InstanceTypeCode

Property	Value
Description	Type of instance of a recurring series.
DisplayName	Recurring Instance Type
IsValidForForm	False
IsValidForRead	True
LogicalName	instancetypecode
RequiredLevel	SystemRequired
Type	Picklist

InstanceTypeCode Choices/Options

Value	Label
0	Not Recurring
1	Recurring Master
2	Recurring Instance
3	Recurring Exception
4	Recurring Future Exception

IsRegularActivity

Property	Value
Description	Information regarding whether the activity is a regular activity type or event type.
DisplayName	Is Regular Activity
IsValidForForm	False
IsValidForRead	True
LogicalName	isregularactivity
RequiredLevel	SystemRequired
Type	Boolean

IsRegularActivity Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: True

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of user who last modified the activity.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when activity was last modified.
DisplayName	Last Updated
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who last modified the activitypointer.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

OnHoldTime

Added by: Active Solution Solution

Property	Value
Description	Shows how long, in minutes, that the record was on hold.
DisplayName	On Hold Time (Minutes)
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	onholdtime
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None

Property	Value
Type	Integer

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the business unit that owns the activity.
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None

Property	Value
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	160
RequiredLevel	None
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the team that owns the activity.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user that owns the activity.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

PostponeActivityProcessingUntil

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Delay activity processing until
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	postponeactivityprocessinguntil
RequiredLevel	None
Type	DateTime

SenderMailboxId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the mailbox associated with the sender of the email message.
DisplayName	Sender's Mailbox
IsValidForForm	False
IsValidForRead	True
LogicalName	sendermailboxid
RequiredLevel	None
Targets	mailbox
Type	Lookup

SenderMailboxIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	sendermailboxidname
MaxLength	100
RequiredLevel	None
Type	String

SentOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was sent.
DisplayName	Date Sent
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	senton
RequiredLevel	None
Type	DateTime

SeriesId

Property	Value
Description	Uniqueidentifier specifying the id of recurring series of an instance.
DisplayName	Series Id
IsValidForForm	False
IsValidForRead	True
LogicalName	seriesid
RequiredLevel	None
Type	Uniqueidentifier

ServiceIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	serviceidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

SLAInvokedId

Added by: Active Solution Solution

Property	Value
Description	Last SLA that was applied to this case. This field is for internal use only.

Property	Value
DisplayName	Last SLA applied
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedid
RequiredLevel	None
Targets	sla
Type	Lookup

SLAInvokedIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedidname
MaxLength	100
RequiredLevel	None
Type	String

SLAName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slaname
MaxLength	100
RequiredLevel	None
Type	String

TransactionCurrencyIdName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version number of the activity.
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_copilottranscript_msdyn_copilottranscriptdata_copilottranscriptid

Same as msdyn_copilottranscriptdata table msdyn_msdyn_copilottranscript_msdyn_copilottranscriptdata_copilottranscriptid Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_copilottranscriptdata
ReferencingAttribute	msdyn_copilottranscriptid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_copilottranscript_msdyn_copilottranscriptdata_copilottranscriptid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade

Property	Value
	Share: NoCascade Unshare: NoCascade

See also

Enable Copilot features in Customer Service (preview)
Web API Reference

msdyn_copilottranscriptdata table

Article • 09/11/2023

Entity to store the actual transcript data.

Added by: msdyn_CSIntelligence Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_copilottranscriptdatas(*msdyn_copilottranscriptdataid*) Update `ownerid` property.	AssignRequest
BulkRetain	BulkRetain Action	Microsoft.Crm.Sdk.Messages.BulkRetainReques
Create	POST [*org URI*]/api/data/v9.0/msdyn_copilottranscriptdatas See Create	CreateRequest or Create
CreateMultiple	CreateMultiple Action	CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_copilottranscriptdatas(*msdyn_copilottranscriptdataid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
PurgeRetainedContent	PurgeRetainedContent Action	Microsoft.Crm.Sdk.Messages.PurgeRetainedCo
Retain	Retain Action	Microsoft.Crm.Sdk.Messages.RetainRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_copilottranscriptdatas(*msdyn_copilottranscriptdataid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_copilottranscriptdatas See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
RollbackRetain	RollbackRetain Action	Microsoft.Crm.Sdk.Messages.RollbackRetainRe
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_copilottranscriptdatas(*msdyn_copilottranscriptdataid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_copilottranscriptdatas(*msdyn_copilottranscriptdataid*) See Update	UpdateRequest or Update
UpdateMultiple	UpdateMultiple Action	UpdateMultipleRequest
ValidateRetentionConfig	ValidateRetentionConfig Action	Microsoft.Crm.Sdk.Messages.ValidateRetentior

Properties

Property	Value
CollectionSchemaName	msdyn_copilottranscriptdatas
DisplayCollectionName	Copilot Transcript Datas
DisplayName	Copilot Transcript Data

Property	Value
EntitySetName	msdyn_copilottranscriptdatas
IsBPFEntity	False
LogicalCollectionName	msdyn_copilottranscriptdatas
LogicalName	msdyn_copilottranscriptdata
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_copilottranscriptdataid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_copilottranscriptdata

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_copilottranscriptdataId
- msdyn_copilottranscriptid
- msdyn_name
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_copilottranscriptdataId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Copilot Transcript Data
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	msdyn_copilottranscriptdataid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_copilottranscriptid

Property	Value
Description	
DisplayName	Copilot Transcript Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_copilottranscriptid
RequiredLevel	ApplicationRequired
Targets	msdyn_copilottranscript
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None

Property	Value
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Copilot Transcript Data
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active

Value	Label	DefaultStatus	InvariantName
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Copilot Transcript Data
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1

Property	Value
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_copilottranscriptidName
- msdyn_transcriptdata_Name
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.

Property	Value
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_copilottranscriptidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_copilottranscriptidname
MaxLength	400
RequiredLevel	None
Type	String

msdyn_transcriptdata_Name

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_transcriptdata_name
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related table. Listed by **SchemaName**.

msdyn_msdyn_copilottranscript_msdyn_copilottranscriptdata_copilottranscriptid

Added by: Active Solution Solution

See msdyn_copilottranscript Table msdyn_msdyn_copilottranscript_msdyn_copilottranscriptdata_copilottranscriptid One-To-Many relationship.

See also

Enable Copilot features in Customer Service (preview)
Web API Reference

msdyn_customengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Custom Messaging Engagement Context

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_customengagementctxes(*msdyn_customengagementctxid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_customengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_customengagementctxes(*msdyn_customengagementctxid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_customengagementctxes(*msdyn_customengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_customengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReque
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_customengagementctxes(*msdyn_customengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_customengagementctxes(*msdyn_customengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_customengagementctxes
DisplayCollectionName	Custom Messaging Engagement Contexts
DisplayName	Custom Messaging Engagement Context
EntitySetName	msdyn_customengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_customengagementctxes
LogicalName	msdyn_customengagementctx

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_customengagementctxid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_customengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_customchanneltype
- msdyn_customengagementctxId
- msdyn_customeremailaddress
- msdyn_customerfirstname
- msdyn_customerlastname
- msdyn_customername
- msdyn_customerphonenumber
- msdyn_customsenderid
- msdyn_liveworkitemid
- msdyn_name
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_customchanneltype

Property	Value
Description	Custom Messaging Channel Type
DisplayName	Custom Messaging Channel Type
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customchanneltype
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Custom Messaging Engagement Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_customengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_customeremailaddress

Property	Value
Description	Email Address
DisplayName	Customer Email Address
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customeremailaddress
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customerfirstname

Property	Value
Description	First Name
DisplayName	Customer First Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_customerfirstname
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_customerlastname

Property	Value
Description	Last Name
DisplayName	Customer Last Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerlastname
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_customername

Property	Value
Description	Full name of the customer
DisplayName	Customer Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customerphonenumber

Property	Value
Description	Phone Number
DisplayName	Customer Phone Number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerphonenumber

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customsenderid

Property	Value
Description	Sender Id
DisplayName	Custom Messaging Sender Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customsenderid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique identifier for Conversation associated with Custom Engagement Context.
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Custom Messaging Engagement Context
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Custom Messaging Engagement Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon

Property	Value
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_decisioncontract Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores information about contract that will be required for ruleset definition

Added by: Dynamics 365 UR Decision Engine Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_decisioncontracts(*msdyn_decisioncontractid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_decisioncontracts See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_decisioncontracts(*msdyn_decisioncontractid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_decisioncontracts(*msdyn_decisioncontractid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_decisioncontracts See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_decisioncontracts(*msdyn_decisioncontractid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_decisioncontracts(*msdyn_decisioncontractid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_decisioncontracts
DisplayCollectionName	Decision contracts
DisplayName	Decision contract
EntitySetName	msdyn_decisioncontracts
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_decisioncontracts
LogicalName	msdyn_decisioncontract
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_decisioncontractid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_decisioncontract

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_contractdefinition
- msdyn_decisioncontractId
- msdyn_name
- msdyn_UniqueName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_contractdefinition

Property	Value
Description	Contract definition for input/output for a ruleset
DisplayName	Contract definition
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_contractdefinition
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_decisioncontractId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Decision contract
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_decisioncontractid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	Name of the contract record
DisplayName	Name
FormatName	Text

Property	Value
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_UniqueName

Property	Value
Description	Unique name for the contract
DisplayName	Unique name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	256
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Decision contract
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Decision contract
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None

Property	Value
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OverwriteTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.

Property	Value
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time

Property	Value
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.

Property	Value
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_decisionruleset Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Contains list of rules to define demand and assignment behavior

Added by: Dynamics 365 UR Decision Engine Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_decisionrulesets(*msdyn_decisionrulesetid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_decisionrulesets See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_decisionrulesets(*msdyn_decisionrulesetid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_decisionrulesets(*msdyn_decisionrulesetid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_decisionrulesets See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_decisionrulesets(*msdyn_decisionrulesetid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_decisionrulesets(*msdyn_decisionrulesetid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_decisionrulesets
DisplayCollectionName	Decision rule sets
DisplayName	Decision rule set
EntitySetName	msdyn_decisionrulesets

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_decisionrulesets
LogicalName	msdyn_decisionruleset
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_decisionrulesetid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_decisionruleset

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_aibmodelid
- msdyn_authoringmode
- msdyn_decisionrulesetId
- msdyn_description
- msdyn_inputcontractid
- msdyn_isinputcollection
- msdyn_mlmodeltype
- msdyn_name
- msdyn_outputcontractid
- msdyn_rulesetdefinition
- msdyn_rulesettype
- msdyn_UniqueName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647

Property	Value
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_aibmodelid

Added by: Dynamics 365 UR ML Decision Engine Solution

Property	Value
Description	AI builder model for the ruleset
DisplayName	AI builder model
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_aibmodelid
RequiredLevel	None
Targets	msdyn_aimodel
Type	Lookup

msdyn_authoringmode

Property	Value
Description	Defines the authoring mode for the rule set
DisplayName	Authoring mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_authoringmode
RequiredLevel	None
Type	Picklist

msdyn_authoringmode Options

Value	Label
192350000	Decision list

msdyn_decisionrulesetId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Decision rule set
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_decisionrulesetid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_description

Property	Value
Description	Description of the rule set record
DisplayName	Description
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	500
RequiredLevel	None
Type	String

msdyn_inputcontractid

Property	Value
Description	Input contract for the ruleset
DisplayName	Input contract
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_inputcontractid
RequiredLevel	None
Targets	msdyn_decisioncontract

Property	Value
Type	Lookup

msdyn_isinputcollection

Property	Value
Description	Represent collection of similar type
DisplayName	Is input collection
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isinputcollection
RequiredLevel	None
Type	Boolean

msdyn_isinputcollection Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_mlmodeltype

Added by: Dynamics 365 UR ML Decision Engine Solution

Property	Value
Description	Defines the type for ML model
DisplayName	ML model type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_mlmodeltype
RequiredLevel	None
Type	Picklist

msdyn_mlmodeltype Options

Value	Label
192350000	Skill based

msdyn_name

Property	Value
Description	Name of the rule set record

Property	Value
DisplayName	Name
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_outputcontractid

Property	Value
Description	Output contract for the ruleset
DisplayName	Output contract
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_outputcontractid
RequiredLevel	None
Targets	msdyn_decisioncontract
Type	Lookup

msdyn_rulesetdefinition

Property	Value
Description	Defines type of the rule set
DisplayName	Rule set definition
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_rulesetdefinition
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_rulesettype

Property	Value
Description	Defines type of the rule set

Property	Value
DisplayName	Rule set type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_rulesettype
RequiredLevel	None
Type	Picklist

msdyn_rulesettype Options

Value	Label
192350000	Declarative
192350001	ML model based

msdyn_UniqueName

Property	Value
Description	Unique name for the ruleset record
DisplayName	Unique name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	256
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None

Property	Value
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Decision rule set
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Decision rule set
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_aibmodelidName
- msdyn_inputcontractidName
- msdyn_outputcontractidName
- OverwriteTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

msdyn_aibmodelidName

Added by: Dynamics 365 UR ML Decision Engine Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_aibmodelidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_inputcontractidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_inputcontractidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_outputcontractidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	msdyn_outputcontractidname
MaxLength	200
RequiredLevel	None
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_entityconfig Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores entity routing configuration per workstream

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_entityconfigs(*msdyn_entityconfigid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_entityconfigs See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_entityconfigs(*msdyn_entityconfigid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_entityconfigs(*msdyn_entityconfigid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_entityconfigs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_entityconfigs(*msdyn_entityconfigid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_entityconfigs(*msdyn_entityconfigid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_entityconfigs
DisplayCollectionName	Deprecated Workstream Entity Configurations
DisplayName	Deprecated Workstream Entity Configuration

Property	Value
EntitySetName	msdyn_entityconfigs
IsBPFEntity	False
LogicalCollectionName	msdyn_entityconfigs
LogicalName	msdyn_entityconfig
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_entityconfigid
PrimaryNameAttribute	msdyn_entity
SchemaName	msdyn_entityconfig

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_entity
- msdyn_entityconfigId
- msdyn_EntitySetName
- msdyn_LiveWorkStreamId
- msdyn_RelationshipName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_entity

Property	Value
Description	The name of the entity.
DisplayName	Entity
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entity
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_entityconfigId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Work Stream Entity Configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_entityconfigid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_EntitySetName

Property	Value
Description	
DisplayName	Entity Set Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entitysetname
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_LiveWorkStreamId

Property	Value
Description	Unique identifier for Work stream associated with Work stream entity configuration.
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_RelationshipName

Property	Value
Description	
DisplayName	Relationship Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_relationshipname
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Entity Config
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active

Value	Label	DefaultStatus	InvariantName
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Entity Config
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_LiveWorkStreamIdName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_LiveWorkStreamIdName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_liveworkstream_msdyn_entityconfig

See msdyn_liveworkstream Entity msdyn_msdyn_liveworkstream_msdyn_entityconfig One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_entityroutingconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Entity Routing Configuration

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_entityroutingconfigurations(*msdyn_entityroutingconfigurationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_entityroutingconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_entityroutingconfigurations(*msdyn_entityroutingconfigurationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_entityroutingconfigurations(*msdyn_entityroutingconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_entityroutingconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccess
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_entityroutingconfigurations(*msdyn_entityroutingconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_entityroutingconfigurations(*msdyn_entityroutingconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_entityroutingconfigurations
DisplayCollectionName	Entities
DisplayName	Entity
EntitySetName	msdyn_entityroutingconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_entityroutingconfigurations
LogicalName	msdyn_entityroutingconfiguration

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_entityroutingconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_entityroutingconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_DeroutingProcess
- msdyn_entity
- msdyn_entityroutingconfigurationId
- msdyn_entitysetname
- msdyn_name
- msdyn_relationshipname
- msdyn_RoutingProcess
- msdyn_routingrulesubgrid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_DeroutingProcess

Property	Value
Description	Process used for configuring the derouting criteria
DisplayName	Derouting Process
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_deroutingprocess

Property	Value
RequiredLevel	ApplicationRequired
Targets	workflow
Type	Lookup

msdyn_entity

Property	Value
Description	Custom entity.
DisplayName	Entity
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entity
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_entityroutingconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Entity Routing Configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_entityroutingconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_entitysetname

Property	Value
Description	Entity set name of the entity being routed
DisplayName	Entity Set Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entitysetname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	Name of Entity Routing Configuration
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_relationshipname

Property	Value
Description	Relationship name of the entity with LiveWorkItem entity
DisplayName	Relationship Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_relationshipname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_RoutingProcess

Property	Value
Description	Routing Process
DisplayName	Routing Process
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routingprocess
RequiredLevel	ApplicationRequired
Targets	workflow
Type	Lookup

msdyn_routingrulesubgrid

Property	Value
Description	Field to bind Routing Rule Subgrid wrapper control

Property	Value
DisplayName	Routing Rules control field
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routingrulesubgrid
MaxLength	4000
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Entity Routing Configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Entity Routing Configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_DeroutingProcessName
- msdyn_RoutingProcessName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam

- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_DeroutingProcessName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_deroutingprocessname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_RoutingProcessName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_routingprocessname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_entityroutingconfiguration_msdyn_liveworkstream

Same as msdyn_liveworkstream entity msdyn_entityroutingconfiguration_msdyn_liveworkstream Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_liveworkstream
ReferencingAttribute	msdyn_entityroutingconfigurationid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_entityroutingconfiguration_msdyn_liveworkstream
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: Restrict Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_facebookengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Facebook Engagement Context

Added by: Omnichannel – Facebook Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_facebookengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_facebookengagementctxes(*msdyn_facebookengagementctxid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_facebookengagementctxes(*msdyn_facebookengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_facebookengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_facebookengagementctxes(*msdyn_facebookengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_facebookengagementctxes(*msdyn_facebookengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_facebookengagementctxes
DisplayCollectionName	Facebook Engagement Contexts
DisplayName	Facebook Engagement Context
EntitySetName	msdyn_facebookengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_facebookengagementctxes
LogicalName	msdyn_facebookengagementctx
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_facebookengagementctxid

Property	Value
PrimaryNameAttribute	msdyn_customername
SchemaName	msdyn_facebookengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_customerfirstname
- msdyn_customerlastname
- msdyn_customername
- msdyn_facebookengagementctxId
- msdyn_facebookengagementid
- msdyn_gender
- msdyn_liveworkitemid
- msdyn_locale
- msdyn_name
- msdyn_profilepic
- msdyn_timezone
- msdyn_userpagescopedid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_customerfirstname

Property	Value
Description	First name of the customer
DisplayName	Customer First Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerfirstname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customerlastname

Property	Value
Description	Last name of the customer
DisplayName	Customer Last Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerlastname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customername

Property	Value
Description	Full name of the customer
DisplayName	Customer Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customername
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

msdyn_facebookengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Facebook Engagement Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_facebookengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_facebookengagementid

Property	Value
Description	Facebook engagement id
DisplayName	Facebook Engagement Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_facebookengagementid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_gender

Property	Value
Description	Customer gender
DisplayName	Gender
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_gender

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique identifier for Conversation associated with Facebook Engagement Context.
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_locale

Property	Value
Description	Locale
DisplayName	Locale
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_locale
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_profilepic

Property	Value
Description	The url of the customer's profile picture
DisplayName	Profile Picture
FormatName	Url
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_profilepic
MaxLength	500
RequiredLevel	None
Type	String

msdyn_timezone

Property	Value
Description	Timezone
DisplayName	Timezone
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_timezone
MaxLength	100
RequiredLevel	None
Type	String

msdyn_userpagescopedid

Property	Value
Description	User page scoped id for identifier of a conversation on a FB page

Property	Value
DisplayName	User Page Scoped Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_userpagescopedid
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Facebook Engagement Context
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Facebook Engagement Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None

Property	Value
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200

Property	Value
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_lineengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

LINE Engagement Context

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_lineengagementctxes(*msdyn_lineengagementctxid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_lineengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_lineengagementctxes(*msdyn_lineengagementctxid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_lineengagementctxes(*msdyn_lineengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_lineengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_lineengagementctxes(*msdyn_lineengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_lineengagementctxes(*msdyn_lineengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_lineengagementctxes
DisplayCollectionName	LINE Engagement Contexts
DisplayName	LINE Engagement Context
EntitySetName	msdyn_lineengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_lineengagementctxes

Property	Value
LogicalName	msdyn_lineengagementctx
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_lineengagementctxid
PrimaryNameAttribute	msdyn_customername
SchemaName	msdyn_lineengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_customerid
- msdyn_customername
- msdyn_lineengagementctxId
- msdyn_lineengagementid
- msdyn_liveworkitemid
- msdyn_name
- msdyn_profilepic
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_customerid

Property	Value
Description	Unique identifier of customer
DisplayName	Customer Id
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customername

Property	Value
Description	Full name of the customer
DisplayName	Customer Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_lineengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Line Engagement Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_lineengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_lineengagementid

Property	Value
Description	Line engagement id
DisplayName	Line Engagement Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_lineengagementid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique identifier for Conversation associated with Line Engagement Context.
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_profilepic

Property	Value
Description	The url of the customer's profile picture
DisplayName	Profile Picture
FormatName	Url
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_profilepic

Property	Value
MaxLength	500
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Line Engagement Context
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Line Engagement Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber

Property	Value
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_livechatconfig Entity Reference

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores chat widget customizations

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_livechatconfigs See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_livechatconfigs(*msdyn_livechatconfigid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_livechatconfigs(*msdyn_livechatconfigid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_livechatconfigs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_livechatconfigs(*msdyn_livechatconfigid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_livechatconfigs(*msdyn_livechatconfigid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_livechatconfigs
DisplayCollectionName	Chat Widgets
DisplayName	Chat Widget
EntitySetName	msdyn_livechatconfigs
IsBPFEntity	False
LogicalCollectionName	msdyn_livechatconfigs

Property	Value
LogicalName	msdyn_livechatconfig
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_livechatconfigid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_livechatconfig

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_agentDisplayName
- msdyn_AuthsettingsId
- msdyn_AutoDetectLanguage
- msdyn_avatarUrl
- msdyn_averagewaittime_enabled
- msdyn_callingoptions
- msdyn_cobrowseprovider
- msdyn_Duringnonoperatinghours
- msdyn_EmailTemplate
- msdyn_enablechatreconnect
- msdyn_Enablechattranscriptdownload
- msdyn_Enablechattranscriptemail
- msdyn_enablecobrowse
- msdyn_Enablefileattachmentsforagents
- msdyn_Enablefileattachmentsforcustomers
- msdyn_enablescreensharing
- msdyn_genericagentdisplayname
- msdyn_infolabel
- msdyn_Language
- msdyn_livechatconfigId
- msdyn_liveworkstreamid
- msdyn_Mailbox
- msdyn_name
- msdyn_oc_geolocationprovider
- msdyn_ocWidgetLanguage
- msdyn_offlinewidgetsubtitle
- msdyn_offlinewidgetthemecolor
- msdyn_offlinewidgettitle
- msdyn_operatinghourid
- msdyn_portalurl
- msdyn_positioninqueue_enabled
- msdyn_postchatenabled
- msdyn_PostConversationSurvey

- msdyn_PostConversationSurveyEnable
- msdyn_PostConversationSurveyMessageText
- msdyn_PostConversationSurveyMode
- msdyn_PrechatEnabled
- msdyn_PreChatQuestionnaireAuthenticated
- msdyn_PreChatQuestionnaireUnauthenticated
- msdyn_proactivechatenabled
- msdyn_redirectionurl
- msdyn_requestvisitorlocation
- msdyn_screensharingprovider
- msdyn_showagentname
- msdyn_Showwidgetduringofflinehours
- msdyn_timetoreconnectwithpreviousagent
- msdyn_widgetAppId
- msdyn_WidgetLocale
- msdyn_widgetPosition
- msdyn_WidgetSnippet
- msdyn_widgetSubtitle
- msdyn_widgetThemeColor
- msdyn_widgetTitle
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_agentDisplayName

Property	Value
Description	Configure agent name to be displayed in the chat widget
DisplayName	Agent display name
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentdisplayname
RequiredLevel	None
Type	Picklist

msdyn_agentDisplayName Options

Value	Label
192350000	Full name
192350001	First name
192350002	Last name
192350003	Nick name

msdyn_AuthsettingsId

Property	Value
Description	Unique identifier for Authentication settings associated with Chat widget.
DisplayName	Authentication settings
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_authsettingsid
RequiredLevel	None
Targets	msdyn_authenticationsettings
Type	Lookup

msdyn_AutoDetectLanguage

Property	Value
Description	Indicates if the chat widget should automatically detect user locale.
DisplayName	Auto Detect Language
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_autodetectlanguage
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_AutoDetectLanguage Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_avatarUrl

Property	Value
Description	Chat logo
DisplayName	Logo
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_avatarurl
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_averagewaittime_enabled

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Indicates whether display of wait time is enabled
DisplayName	Indicates whether display of wait time is enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_averagewaittime_enabled

Property	Value
RequiredLevel	None
Type	Boolean

msdyn_averagewaittime_enabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_callingoptions

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	List of calling options available for the chat widget
DisplayName	Calling options
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_callingoptions
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_callingoptions Options

Value	Label
192350000	No calling
192350001	Video and voice calling
192350002	Voice only

msdyn_cobrowseprovider

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Select a co-browse provider
DisplayName	Co-browse provider

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_cobrowseprovider
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Duringnonoperatinghours

Property	Value
Description	During non-operating hours
DisplayName	During non-operating hours
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_duringnonoperatinghours
MaxLength	100
RequiredLevel	None
Type	String

msdyn_EmailTemplate

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Email Template
DisplayName	Email Template
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_emailtemplate

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_enablechatreconnect

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	This will let customers reconnect to their previous session.
DisplayName	Turn on reconnect to previous chat
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablechatreconnect
RequiredLevel	None
Type	Boolean

msdyn_enablechatreconnect Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_Enablechattranscriptdownload

Property	Value
Description	Allow download of transcript
DisplayName	Allow download of transcript
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablechattranscriptdownload
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_Enablechattranscriptdownload Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_Enablechattranscriptemail

Property	Value
Description	Allow email of transcript
DisplayName	Allow email of transcript
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablechattranscriptemail
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_Enablechattranscriptemail Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablecobrowse

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Co-browse allows agent and customer to interact on the same web page in real time
DisplayName	Enable Co-browse
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablecobrowse
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enablecobrowse Options

Value	Label
1	Enabled
0	Disabled

DefaultValue: False

msdyn_Enablefileattachmentsforagents

Property	Value
Description	Enable file attachments for agents
DisplayName	Enable file attachments for agents
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforagents
RequiredLevel	None
Type	Boolean

msdyn_Enablefileattachmentsforagents Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_Enablefileattachmentsforcustomers

Property	Value
Description	Enable file attachments for customers
DisplayName	Enable file attachments for customers
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforcustomers
RequiredLevel	None
Type	Boolean

msdyn_Enablefileattachmentsforcustomers Options

Value	Label

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablescreensharing

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Enable Screen sharing
DisplayName	Enable Screen sharing
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablescreensharing
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enablescreensharing Options

Value	Label
1	Enabled
0	Disabled

DefaultValue: False

msdyn_genericagentdisplayname

Property	Value
Description	Display Agent Generic Name
DisplayName	Display Generic Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_genericagentdisplayname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

msdyn_infolabel

Property	Value
Description	Label string indicating user to save the record to add location information
DisplayName	infolabel
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_infolabel
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Language

Property	Value
Description	Language in which chat widget is rendered
DisplayName	Language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_language
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_Language Options

Value	Label
192350000	Auto-Detect
192360014	English

msdyn_livechatconfigId

Property	Value

Property	Value
Description	Unique identifier for entity instances
DisplayName	Chat Widget
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_livechatconfigid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_liveworkstreamid

Property	Value
Description	Work Stream Identifier
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_Mailbox

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	The mailbox where your email transcripts will be sent from.
DisplayName	“From” mailbox
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_mailbox
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_oc_geolocationprovider

Property	Value
Description	Geo Location Provider API Key
DisplayName	Provider API key
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_oc_geolocationprovider
RequiredLevel	None
Targets	msdyn_oc_geolocationprovider
Type	Lookup

msdyn_ocWidgetLanguage

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	The language of the chat widget.
DisplayName	Language
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguage
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_offlinewidgetsubtitle

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Description for offline widget subtitle attribute
DisplayName	Offline Widget Subtitle
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_offlinewidgetsubtitle
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_offlinewidgetthemecolor

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Description for offline widget theme color attribute
DisplayName	Offline Widget Theme Color
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_offlinewidgetthemecolor
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_offlinewidgetthemecolor Options

Value	Label
19236001	Red
19236002	Blue
19236003	Green
19236004	Black
192350001	Orange
192350002	Pink
192350003	Grey
192350004	Violet
192350005	Brown
192350006	Clay
192350007	Purple
192360017	Teal

msdyn_offlinewidgettitle

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Description for offline widget title attribute
DisplayName	Offline Widegt Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_offlinewidgettitle
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_operatinghourid

Property	Value
Description	Unique identifier for Operating hour associated with Chat widget.
DisplayName	Operating hours
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_operatinghourid
RequiredLevel	None
Targets	msdyn_operatinghour
Type	Lookup

msdyn_portalurl

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Provide a link to the web portal where your chat is hosted.
DisplayName	Portal URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_portalurl
MaxLength	100
RequiredLevel	None
Type	String

msdyn_positioninqueue_enabled

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Enable Position In Queue feature
DisplayName	Show position in queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_positioninqueue_enabled
RequiredLevel	None
Type	Boolean

msdyn_positioninqueue_enabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_postchatenabled

Property	Value
Description	Enable Post-Chat (Deprecated)
DisplayName	Post-chat Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postchatenabled
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_postchatenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurvey

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Lookup to Forms Pro survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_PostConversationSurveyEnable

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	To enable or disable post conversation survey
DisplayName	Enable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyenable
RequiredLevel	None
Type	Boolean

msdyn_PostConversationSurveyEnable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyMessageText

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymessagetext
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyMode

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Mode of the survey to be sent
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyMode Options

Value	Label
192350000	Insert survey in conversation
192350001	Send survey link to conversation

msdyn_PrechatEnabled

Property	Value
Description	Enable Pre-chat survey feature
DisplayName	Pre-Chat Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_prechatenabled
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_PrechatEnabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PreChatQuestionnaireAuthenticated

Property	Value
Description	Prechat Question set for authenticated users

Property	Value
DisplayName	Question Set for Authenticated Users
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_prechatquestionnaireauthenticated
RequiredLevel	None
Targets	
Type	Lookup

msdyn_PreChatQuestionnaireUnauthenticated

Property	Value
Description	Prechat Question set for unauthenticated users
DisplayName	Question Set for Unauthenticated Users
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_prechatquestionnaireunauthenticated
RequiredLevel	None
Targets	
Type	Lookup

msdyn_proactivechatenabled

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Enable Proactive chat for this chat widget
DisplayName	Proactive-chat
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_proactivechatenabled
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_proactivechatenabled Options

Value	Label

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_redirectionurl

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	We'll redirect customers to this webpage.
DisplayName	Redirection URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_redirectionurl
MaxLength	100
RequiredLevel	None
Type	String

msdyn_requestvisitorlocation

Property	Value
Description	Enable Visitor Location Feature
DisplayName	Request visitor location
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_requestvisitorlocation
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_requestvisitorlocation Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_screensharingprovider

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Select a screen sharing provider
DisplayName	Screen sharing provider
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_screensharingprovider
MaxLength	100
RequiredLevel	None
Type	String

msdyn_showagentname

Property	Value
Description	Agent Display Name configuration for the chat widget
DisplayName	Anonymize Agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_showagentname
RequiredLevel	None
Type	Boolean

msdyn_showagentname Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_Showwidgetduringofflinehours

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Description for show/hide offline widget attribute
DisplayName	Show widget during offline hours
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_showwidgetduringofflinehours
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_Showwidgetduringofflinehours Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_timetoreconnectwithpreviousagent

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	The previous agent's capacity will be held for this time period.
DisplayName	Reconnect to previous agent for
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_timetoreconnectwithpreviousagent
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_widgetAppId

Property	Value
Description	Widget App Identifier used to identify the chat widget

Property	Value
DisplayName	Widget App Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgetappid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_WidgetLocale

Property	Value
Description	The language of the chat widget.
DisplayName	Language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgetlocale
RequiredLevel	None
Targets	msdyn_chatwidgetlanguage
Type	Lookup

msdyn_widgetPosition

Property	Value
Description	Chat position relative to the page
DisplayName	Position
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgetposition
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_widgetPosition Options

Value	Label
192236010	Bottom right
192236011	Bottom left

msdyn_WidgetSnippet

Property	Value
Description	Javascript snippet which can be embedded in a webpage
DisplayName	Widget Snippet
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgetsnippet
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_widgetSubtitle

Property	Value
Description	Subtitle for the chat widget
DisplayName	Subtitle
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgetsubtitle
MaxLength	100
RequiredLevel	None
Type	String

msdyn_widgetThemeColor

Property	Value
Description	Theme color for the chat widget

Property	Value
DisplayName	Theme Color
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgetthemecolor
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_widgetThemeColor Options

Value	Label
19236001	Red
19236002	Blue
19236003	Green
19236004	Black
192350001	Orange
192350002	Pink
192350003	Grey
192350004	Violet
192350005	Brown
192350006	Clay
192350007	Purple
192360017	Teal

msdyn_widgetTitle

Property	Value
Description	Title for the chat widget
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgettitle
MaxLength	100

Property	Value
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Chat widget
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Chat widget
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_AuthsettingsIdName
- msdyn_liveworkstreamidName
- msdyn_oc_geolocationproviderName
- msdyn_ocWidgetLanguageName
- msdyn_operatinghouridName
- msdyn_PostConversationSurveyName
- msdyn_WidgetLocaleName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_AuthsettingsIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_authsettingsidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

msdyn_oc_geolocationproviderName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_oc_geolocationprovidername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocWidgetLanguageName

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguagename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_operatinghouridName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_operatinghouridname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyName

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyname
MaxLength	450
RequiredLevel	None
Type	String

msdyn_WidgetLocaleName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	msdyn_widgetlocalename
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_livechatconfig_msdyn_questionsequence
- msdyn_msdyn_livechatconfig_msdyn_chatquestionnaireresponse
- msdyn_msdyn_livechatconfig_msdyn_livechatwidgetlocation_livechatconfigid

msdyn_livechatconfig_msdyn_questionsequence

Same as msdyn_questionsequence entity msdyn_livechatconfig_msdyn_questionsequence Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_questionsequence
ReferencingAttribute	msdyn_chatengagementtochatsequenceid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_livechatconfig_msdyn_questionsequence

Property	Value
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_livechatconfig_msdyn_chatquestionnaireresponse

Same as msdyn_chatquestionnaireresponse entity
msdyn_msdyn_livechatconfig_msdyn_chatquestionnaireresponse Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_chatquestionnaireresponse
ReferencingAttribute	msdyn_livechatconfigid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_livechatconfig_msdyn_chatquestionnaireresponse
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_livechatconfig_msdyn_livechatwidgetlocation_livechatconfigid

Same as msdyn_livechatwidgetlocation entity
msdyn_msdyn_livechatconfig_msdyn_livechatwidgetlocation_livechatconfigid Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_livechatwidgetlocation
ReferencingAttribute	msdyn_livechatconfigid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_livechatconfig_msdyn_livechatwidgetlocation_livechatconfigid

Property	Value
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_msdyn_authsettings_msdyn_livechatconfig
- msdyn_msdyn_liveworkstream_msdyn_livechatconfig_liveworkstreamid

msdyn_msdyn_authsettings_msdyn_livechatconfig

See msdyn_authenticationsettings Entity msdyn_msdyn_authsettings_msdyn_livechatconfig One-To-Many relationship.

msdyn_msdyn_liveworkstream_msdyn_livechatconfig_liveworkstreamid

Added by: Omnichannel – Base Solution

See msdyn_liveworkstream Entity msdyn_msdyn_liveworkstream_msdyn_livechatconfig_liveworkstreamid One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_livechatengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores context values for a live chat widget

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_livechatengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_livechatengagementctxes(*msdyn_livechatengagementctxid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_livechatengagementctxes(*msdyn_livechatengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_livechatengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_livechatengagementctxes(*msdyn_livechatengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_livechatengagementctxes(*msdyn_livechatengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_livechatengagementctxes
DisplayCollectionName	Live Chat Contexts
DisplayName	Live Chat Context
EntitySetName	msdyn_livechatengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_livechatengagementctxes
LogicalName	msdyn_livechatengagementctx
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_livechatengagementctxid

Property	Value
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_livechatengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_browser
- msdyn_City
- msdyn_country
- msdyn_device
- msdyn_isauthenticated
- msdyn_isproactivechat
- msdyn_latitude
- msdyn_livechatengagementctxId
- msdyn_livechatengagementid
- msdyn_liveworkitemid
- msdyn_locale
- msdyn_longitude
- msdyn_name
- msdyn_originurl
- msdyn_os
- msdyn_portalcontactid
- msdyn_PostalCode
- msdyn_State
- msdyn_Street1
- msdyn_Street2
- msdyn_Street3
- msdyn_widgetappid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_browser

Property	Value
Description	Browser where customer initiated chat
DisplayName	Browser
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_browser
MaxLength	100
RequiredLevel	None
Type	String

msdyn_City

Property	Value
Description	City where customer initiated chat
DisplayName	City
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_city
MaxLength	300
RequiredLevel	None
Type	String

msdyn_country

Property	Value

Property	Value
Description	Country where customer initiated chat
DisplayName	Country/Region
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_country
MaxLength	200
RequiredLevel	None
Type	String

msdyn_device

Property	Value
Description	Device where customer initiated chat
DisplayName	Device
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_device
MaxLength	100
RequiredLevel	None
Type	String

msdyn_isauthenticated

Property	Value
Description	Indicates if chat is authenticated
DisplayName	Is Authenticated Engagement
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isauthenticated
RequiredLevel	None
Type	Boolean

msdyn_isauthenticated Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_isproactivechat

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Indicates if chat was initiated from proactive chat
DisplayName	Is Proactivechat
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isproactivechat
RequiredLevel	None
Type	Boolean

msdyn_isproactivechat Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_latitude

Property	Value
Description	Latitude where customer initiated chat
DisplayName	Latitude
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_latitude
MaxLength	100
RequiredLevel	None
Type	String

msdyn_livechatengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Live Chat Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_livechatengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_livechatengagementid

Property	Value
Description	Unique identifier for engagement context
DisplayName	Live Chat Engagement Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_livechatengagementid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Corresponding conversation identifier for the chat
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_locale

Property	Value
Description	Locale for this chat
DisplayName	Locale
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_locale
MaxLength	100
RequiredLevel	None
Type	String

msdyn_longitude

Property	Value
Description	Longitude where customer initiated chat
DisplayName	Longitude
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_longitude
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name

Property	Value
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_originurl

Property	Value
Description	Browser URL where customer initiated chat
DisplayName	Origin Url
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_originurl
MaxLength	2048
RequiredLevel	None
Type	String

msdyn_os

Property	Value
Description	Operating system where customer initiated chat
DisplayName	Operating System
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_os
MaxLength	100
RequiredLevel	None
Type	String

msdyn_portalcontactid

Property	Value
Description	Customer portal identifier if exists
DisplayName	Portal Contact Id

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_portalcontactid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostalCode

Property	Value
Description	Postal code where customer initiated chat
DisplayName	Zip/Postal Code
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postalcode
MaxLength	100
RequiredLevel	None
Type	String

msdyn_State

Property	Value
Description	State where customer initiated chat
DisplayName	State/Province
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_state
MaxLength	300
RequiredLevel	None
Type	String

msdyn_Street1

Property	Value
Description	Street 1 where customer initiated chat
DisplayName	Street 1
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_street1
MaxLength	200
RequiredLevel	None
Type	String

msdyn_Street2

Property	Value
Description	Street 2 where customer initiated chat
DisplayName	Street 2
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_street2
MaxLength	200
RequiredLevel	None
Type	String

msdyn_Street3

Property	Value
Description	Street 3 where customer initiated chat
DisplayName	Street 3
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_street3

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

msdyn_widgetappid

Property	Value
Description	Corresponding widget application identifier for the chat
DisplayName	Chat Widget App Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgetappid
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id

Property	Value
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Live chat context
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Live chat context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_livechatwidgetlocation Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the location information where a chat widget will be deployed

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_livechatwidgetlocations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_livechatwidgetlocations(*msdyn_livechatwidgetlocationid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_livechatwidgetlocations(*msdyn_livechatwidgetlocationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_livechatwidgetlocations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_livechatwidgetlocations(*msdyn_livechatwidgetlocationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_livechatwidgetlocations(*msdyn_livechatwidgetlocationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_livechatwidgetlocations
DisplayCollectionName	Chat Widget Locations
DisplayName	Chat Widget Location
EntitySetName	msdyn_livechatwidgetlocations
IsBPFEntity	False
LogicalCollectionName	msdyn_livechatwidgetlocations
LogicalName	msdyn_livechatwidgetlocation

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_livechatwidgetlocationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_livechatwidgetlocation

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_domainValue
- msdyn_livechatconfigid
- msdyn_livechatwidgetlocationId
- msdyn_locationurlwildcard
- msdyn_name
- msdyn_RuleType
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_domainValue

Property	Value

Property	Value
Description	Domain on which the chat should be available
DisplayName	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_domainvalue
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_livechatconfigid

Property	Value
Description	Identifier of the chat widget that this location entity controls
DisplayName	Chat widget
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_livechatconfigid
RequiredLevel	ApplicationRequired
Targets	msdyn_livechatconfig
Type	Lookup

msdyn_livechatwidgetlocationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Chat Widget Location
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_livechatwidgetlocationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_locationurlwildcard

Property	Value
Description	URL where chat widget is configured to work. Can be a wild card entry
DisplayName	Location URL Wildcard
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_locationurlwildcard
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_RuleType

Property	Value
Description	Include/Exclude rule for Widget Location
DisplayName	Rule Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ruletype
RequiredLevel	None
Type	Picklist

msdyn_RuleType Options

Value	Label
100000000	Include
100000001	Exclude

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Chat widget location
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Chat widget location
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName

- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_livechatconfigidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_livechatconfigidName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_livechatconfigidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_livechatconfig_msdyn_livechatwidgetlocation_livechatconfigid

See msdyn_livechatconfig Entity msdyn_msdyn_livechatconfig_msdyn_livechatwidgetlocation_livechatconfigid One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_liveconversation Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Tracks the interactions between the agents and customer

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_liveconversations(*msdyn_liveconversationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_liveconversations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_liveconversations(*msdyn_liveconversationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_liveconversations(*msdyn_liveconversationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_liveconversations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_liveconversations(*msdyn_liveconversationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_liveconversations(*msdyn_liveconversationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_liveconversations
DisplayCollectionName	Ongoing conversations
DisplayName	Ongoing conversation
EntitySetName	msdyn_liveconversations
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_liveconversations
LogicalName	msdyn_liveconversation
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_liveconversationid
PrimaryNameAttribute	msdyn_subject
SchemaName	msdyn_liveconversation

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_activeagentassignedon
- msdyn_activeagentid
- msdyn_cdsqueueid
- msdyn_channel
- msdyn_closedon
- msdyn_createdon
- msdyn_customer
- msdyn_customerIdType
- msdyn_customersentimentlabel
- msdyn_escalationcount
- msdyn_initiatedon
- msdyn_liveconversationId
- msdyn_liveworkstreamid
- msdyn_modifiedon
- msdyn_oclastsessionid
- msdyn_queueid
- msdyn_startedon
- msdyn_statecode
- msdyn_statuscode
- msdyn_statusupdatedon
- msdyn_subject
- msdyn_title
- msdyn_transfercount
- msdyn_workstreamworkdistributionmode
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_activeagentassignedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when last agent was assigned to the conversation
DisplayName	Active Agent Assigned On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_activeagentassignedon
RequiredLevel	None
Type	DateTime

msdyn_activeagentid

Property	Value
Description	Last agent assigned to the conversation
DisplayName	Active Agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_activeagentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_cdsqueueid

Property	Value
Description	Unique identifier for Queue associated with Conversation.
DisplayName	Queue
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_cdsqueueid
RequiredLevel	None
Targets	queue
Type	Lookup

msdyn_channel

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	The channel(s) in the conversation.
DisplayName	Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channel
RequiredLevel	None
Type	MultiSelectPicklist

msdyn_channel Options

Value	Label
19241000	Microsoft Teams
192300000	WhatsApp
192310000	LINE
192320000	WeChat
192330000	Facebook
192340000	SMS
192350000	Entity Records
192350001	Twitter
192350002	Custom
192360000	Live chat
192370000	Voice
192380000	Video
192390000	Co-browse
192400000	Screen sharing

msdyn_closedon

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when conversation was closed
DisplayName	Closed On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_closedon
RequiredLevel	None
Type	DateTime

msdyn_createdon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when conversation was created
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_createdon
RequiredLevel	None
Type	DateTime

msdyn_customer

Property	Value
Description	Customer associated to the conversation
DisplayName	Customer
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customer
RequiredLevel	None
Targets	account,contact
Type	Customer

msdyn_customerIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customeridtype
RequiredLevel	None
Type	EntityName

msdyn_customersentimentlabel

Property	Value
Description	Customer Sentiment Label powered by Sentiment Service
DisplayName	Customer Sentiment
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customersentimentlabel
RequiredLevel	None
Type	Picklist

msdyn_customersentimentlabel Options

Value	Label
0	N/A
7	Very negative
8	Negative
9	Slightly negative
10	Neutral
11	Slightly positive
12	Positive
13	Very positive

msdyn_escalationcount

Property	Value
Description	Number of times conversation was escalated to Supervisor i.e. transferred to Supervisor
DisplayName	Escalation Count
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_escalationcount
MaxValue	2147483647
MinValue	0

Property	Value
RequiredLevel	None
Type	Integer

msdyn_initiatedon

Property	Value
DateTimeBehavior	UserLocal
Description	Time when conversation was initiated
DisplayName	Initiated On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_initiatedon
RequiredLevel	None
Type	DateTime

msdyn_liveconversationId

Property	Value
Description	Id of this ongoing conversation record
DisplayName	OngoingConversationId
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveconversationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_liveworkstreamid

Property	Value
Description	Work stream associated to the conversation
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	None
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_modifiedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when conversation was last modified
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_modifiedon
RequiredLevel	None
Type	DateTime

msdyn_oclastsessionid

Property	Value
Description	Last agent session
DisplayName	Last session Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_oclastsessionid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_queueid

Property	Value
Description	Unique identifier for msdyn_omnichannelqueue associated with Conversation
DisplayName	Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueid
RequiredLevel	None
Targets	msdyn_omnichannelqueue
Type	Lookup

msdyn_startedon

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when conversation was started
DisplayName	Started On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_startedon
RequiredLevel	None
Type	DateTime

msdyn_statecode

Property	Value
Description	State of the conversation record
DisplayName	State
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_statecode
RequiredLevel	None
Type	Picklist

msdyn_statecode Options

Value	Label
0	Open
1	Active
2	Waiting
3	Closed
4	Wrap-up

msdyn_statuscode

Property	Value
Description	Reason for the status of Ongoing conversation record
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_statuscode
RequiredLevel	None
Type	Picklist

msdyn_statuscode Options

Value	Label
1	Open
2	Active
3	Waiting
4	Closed
5	Wrap-up

msdyn_statusupdatedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when conversation status was last modified
DisplayName	Status Updated On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_statusupdatedon
RequiredLevel	None
Type	DateTime

msdyn_subject

Property	Value
Description	Subject associated with the conversation record
DisplayName	Subject
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_subject
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_title

Property	Value
Description	Conversation Title
DisplayName	Title
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_title
MaxLength	100
RequiredLevel	None
Type	String

msdyn_transfercount

Property	Value
Description	Number of times the conversation was transferred
DisplayName	Transfer Count
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_transfercount
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_workstreamworkdistributionmode

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Work distribution mode of the associated work stream
DisplayName	Work distribution mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_workstreamworkdistributionmode
RequiredLevel	None
Type	Picklist

msdyn_workstreamworkdistributionmode Options

Value	Label
192350000	Push
192350001	Pick

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user or team who owns the conversation record.
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value

Property	Value
Description	Status of the Ongoing conversation record
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Open	1	Open
1	Active	2	Active
2	Waiting	3	Waiting
3	Closed	4	Closed
4	Wrap-up	5	Wrap-up

statuscode

Property	Value
Description	Reason for the status of Ongoing conversation record
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Open	0
2	Active	1
3	Waiting	2
4	Closed	3
5	Wrap-up	4

TimeZoneRuleVersionNumber

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_activeagentidName
- msdyn_activeagentidYomiName
- msdyn_cdsqueueidName

- msdyn_customerName
- msdyn_customerYomiName
- msdyn_liveworkstreamidName
- msdyn_queueidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the Ongoing Conversation.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the Ongoing Conversation was created.
DisplayName	Date Created
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the Ongoing Conversation.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of user who last modified the Ongoing Conversation.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when Ongoing Conversation was last modified.
DisplayName	Last Updated
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None

Property	Value
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who last modified the Ongoing Conversation.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_activeagentidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_activeagentidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_activeagentidYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_activeagentidyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_cdsqueueidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_cdsqueueidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_customerName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customername
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_customerYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customeryominame
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_queueidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_queueidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the business unit that owns the Ongoing Conversation.
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the team that owns the Ongoing Conversation.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user that owns the Ongoing Conversation.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_msdyn_liveworkstream_msdyn_liveconversation
- msdyn_msdyn_omnichannelqueue_msdyn_liveconversation

msdyn_msdyn_liveworkstream_msdyn_liveconversation

See msdyn_liveworkstream Entity msdyn_msdyn_liveworkstream_msdyn_liveconversation One-To-Many relationship.

msdyn_msdyn_omnichannelqueue_msdyn_liveconversation

See msdyn_omnichannelqueue Entity msdyn_msdyn_omnichannelqueue_msdyn_liveconversation One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_liveworkstream Entity Reference

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores information about the properties of work items that are generated by a unique channel endpoint

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_liveworkstreams(*msdyn_liveworkstreamid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_liveworkstreams See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_liveworkstreams(*msdyn_liveworkstreamid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_liveworkstreams(*msdyn_liveworkstreamid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_liveworkstreams See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_liveworkstreams(*msdyn_liveworkstreamid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_liveworkstreams(*msdyn_liveworkstreamid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_liveworkstreams
DisplayCollectionName	Work Streams

Property	Value
DisplayName	Work Stream
EntitySetName	msdyn_liveworkstreams
IsBPFEntity	False
LogicalCollectionName	msdyn_liveworkstreams
LogicalName	msdyn_liveworkstream
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_liveworkstreamid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_liveworkstream

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_AllowedPresences
- msdyn_APIKey
- msdyn_apikeyversionnumber
- msdyn_AssignWorkItemAfterDecline
- msdyn_AutoCloseAfterInactivity
- msdyn_blockcapacityforwrapup
- msdyn_bot_queue
- msdyn_bot_rule
- msdyn_bot_user
- msdyn_capacityformat
- msdyn_CapacityRequired
- msdyn_ConnectorsURL
- msdyn_conversationmode
- msdyn_CustomerID
- msdyn_defaultqueue
- msdyn_direction
- msdyn_enableagentaffinity
- msdyn_enableautomatedmessages
- msdyn_enableselectingfrompushbasedworkstreams
- msdyn_EntityRoutingConfigurationId
- msdyn_FallBackLanguage
- msdyn_FollowUpAfterWaiting
- msdyn_handlingtimethreshold
- msdyn_isdefault
- msdyn_LastValidationOn
- msdyn_LastValidationStatus
- msdyn_liveworkstreamId
- msdyn_masterentityroutingconfigurationid
- msdyn_matchinglogic
- msdyn_MaxConcurrentConnection
- msdyn_mode
- msdyn_name
- msdyn_Notification
- msdyn_notificationscenarioplaceholder
- msdyn_notificationtemplate_consult
- msdyn_notificationtemplate_incoming_auth

- msdyn_notificationtemplate_incoming_unauth
- msdyn_notificationtemplate_supervisorassign
- msdyn_notificationtemplate_transfer
- msdyn_outboundqueueid
- msdyn_recordidentificationrule
- msdyn_RecordIdentificationValidationRule
- msdyn_restrictdownloadrecording
- msdyn_restrictdownloadtranscript
- msdyn_routingcontractid
- msdyn_Screenpoptimeout
- msdyn_Screenpoptimeout_optionSet
- msdyn_secureapikey
- msdyn_sessionscenarioplaceholder
- msdyn_sessiontemplate_default
- msdyn_smsprovider
- msdyn_streamsource
- msdyn_TelesignInboundURL
- msdyn_TwilioInboundURL
- msdyn_waitingtimethreshold
- msdyn_workdistributionmode
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_AllowedPresences

Property	Value
Description	Allowed base presences for the work stream
DisplayName	Allowed Presences
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_allowedpresences
RequiredLevel	ApplicationRequired
Type	MultiSelectPicklist

msdyn_AllowedPresences Choices/Options

Value	Label
192360000	Available
192360001	Busy
192360002	Busy - DND
192360003	Away
192360004	Offline

msdyn_APIKey

Added by: Omnichannel – SMS Solution

Property	Value
Description	The API Key equivalent to password of account set up with TeleSign
DisplayName	API Key
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_apikey
MaxLength	100
RequiredLevel	None
Type	String

msdyn_apikeyversionnumber

Added by: Omnichannel – SMS Solution

Property	Value
Description	Version number of the API key
DisplayName	API Key Version Number
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_apikeyversionnumber

Property	Value
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_AssignWorkItemAfterDecline

Property	Value
Description	Set the time after which a work item can be assigned to the agent again after they have declined the work item or the request has timed out
DisplayName	Assign WorkItem After Decline or Timeout
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_assignworkitemafterdecline
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_AutoCloseAfterInactivity

Property	Value
Description	Set the time after which the work item will be closed if there is no activity on the work item.
DisplayName	Auto-close after inactivity
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_autocloseafterinactivity
MaxValue	2147483647
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_blockcapacityforwrapup

Property	Value
Description	Time for which the agent's capacity is blocked for wrap up state. After this amount of time the agent's capacity will be released.
DisplayName	Block capacity for wrap up state
Format	None

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_blockcapacityforwrapup
MaxValue	43200
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_bot_queue

Property	Value
Description	The queue created for the bot in the workstream.
DisplayName	Bot queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_bot_queue
RequiredLevel	None
Targets	queue
Type	Lookup

msdyn_bot_rule

Property	Value
Description	The rule added to workstream for bot routing.
DisplayName	Bot rule
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_bot_rule
MaxLength	100
RequiredLevel	None
Type	String

msdyn_bot_user

Property	Value
Description	The user of the bot.
DisplayName	Bot user
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_bot_user
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_capacityformat

Property	Value
Description	Defines how the work stream will measure capacity consumption
DisplayName	Capacity format
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_capacityformat
RequiredLevel	None
Type	Picklist

msdyn_capacityformat Choices/Options

Value	Label
192350000	Unit based
192360000	Profile based

msdyn_CapacityRequired

Property	Value
Description	The units of capacity that should be available for an item of this work stream to be processed.
DisplayName	Capacity
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_capacityrequired
MaxValue	2147483647
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_ConnectorsURL

Added by: Omnichannel – SMS Solution

Property	Value
Description	Flow URL for Dynamics 365 connector
DisplayName	Connectors URL
FormatName	Url
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_connectorsurl
MaxLength	100
RequiredLevel	None
Type	String

msdyn_conversationmode

Added by: Omnichannel – Chat Solution

Property	Value
Description	Conversation mode of chat channels
DisplayName	Conversation mode of chat channels
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_conversationmode
RequiredLevel	None
Type	Picklist

msdyn_conversationmode Choices/Options

Value	Label
192350000	Live Chat
192350001	Persistent Chat

msdyn_CustomerID

Added by: Omnichannel – SMS Solution

Property	Value
Description	The Customer Id equivalent to username of account set up with TeleSign
DisplayName	Customer ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerid

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_defaultqueue

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Link the default queue to the workstream.
DisplayName	Default Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_defaultqueue
RequiredLevel	Recommended
Targets	queue
Type	Lookup

msdyn_direction

Property	Value
Description	Direction to indicate if it's an inbound, outbound, direct inbound or direct outbound workstream
DisplayName	Direction
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_direction
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_direction Choices/Options

Value	Label
0	Inbound
1	Outbound
2	Direct Inbound
3	Direct Outbound

msdyn_enableagentaffinity

Property	Value
Description	Keep same agent for entire conversation

Property	Value
DisplayName	Keep same agent for entire conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enableagentaffinity
RequiredLevel	None
Type	Boolean

msdyn_enableagentaffinity Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enableautomatedmessages

Property	Value
Description	Option for allowing automated messages or not
DisplayName	Allow Automated Messages
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enableautomatedmessages
RequiredLevel	None
Type	Boolean

msdyn_enableautomatedmessages Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_enableselectingfrompushbasedworkstreams

Property	Value
Description	Agents can choose to work on items from push-based work streams.
DisplayName	Enable selecting from push-based work streams
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enableselectingfrompushbasedworkstreams

Property	Value
RequiredLevel	None
Type	Boolean

msdyn_enableselectingfrompushbasedworkstreams Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_EntityRoutingConfigurationId

Property	Value
Description	Unique identifier for Workstream Entity Configuration associated with Work Stream.
DisplayName	Entity
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entityroutingconfigurationid
RequiredLevel	None
Targets	msdyn_entityroutingconfiguration
Type	Lookup

msdyn_FallBackLanguage

Property	Value
Description	Fall back language to be used for Live chat
DisplayName	FallBack Language
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fallbacklanguage
MaxLength	100
RequiredLevel	None
Type	String

msdyn_FollowUpAfterWaiting

Property	Value
Description	Set the time after which the work item should be offered to an agent if the work item has been waiting for input.
DisplayName	Follow-up after waiting

Property	Value
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_followupafterwaiting
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_handlingtimethreshold

Property	Value
Description	Declare the expected handling time under which work items for this work stream should get resolved
DisplayName	Handling Time Threshold
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_handlingtimethreshold
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_isdefault

Property	Value
Description	Indicates whether this is the default workstream or not.
DisplayName	Is Default
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isdefault
RequiredLevel	None
Type	Boolean

msdyn_isdefault Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_LastValidationOn

Added by: Omnichannel – SMS Solution

Property	Value
DateTimeBehavior	TimeZoneIndependent
Description	The time when Validation api was last run
DisplayName	Last Validation On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_lastvalidationon
RequiredLevel	None
Type	DateTime

msdyn_LastValidationStatus

Added by: Omnichannel – SMS Solution

Property	Value
Description	The status of the last Validation results
DisplayName	Last Validation Status
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_lastvalidationstatus
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkstreamId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Work Stream
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_liveworkstreamid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_masterentityroutingconfigurationid

Property	Value
Description	Unique identifier for master entity routing configuration associated with work stream.
DisplayName	Entity
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_masterentityroutingconfigurationid
RequiredLevel	None
Targets	msdyn_masterentityroutingconfiguration
Type	Lookup

msdyn_matchinglogic

Added by: Omnichannel - Skill Based Routing Solution

Property	Value
Description	Matching logic used for Skill Based Routing like Exact Match or Closest match
DisplayName	Matching Logic
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_matchinglogic
RequiredLevel	None
Type	Picklist

msdyn_matchinglogic Choices/Options

Value	Label
192350000	Exact Match
192350001	Closest Match

msdyn_MaxConcurrentConnection

Property	Value
Description	Maximum number of concurrent sessions that an agent can work for a work item of a particular stream.
DisplayName	Max Concurrency
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_maxconcurrentconnection
MaxValue	2147483647
MinValue	1

Property	Value
RequiredLevel	Recommended
Type	Integer

msdyn_mode

Property	Value
Description	Mode of experience
DisplayName	Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_mode
RequiredLevel	None
Type	Picklist

msdyn_mode Choices/Options

Value	Label
717210000	Legacy
717210001	Simplified

msdyn_name

Property	Value
Description	Name of Work stream
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_Notification

Property	Value
Description	Notification type
DisplayName	Notification
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_notification
RequiredLevel	None
Type	Picklist

msdyn_Notification Choices/Options

Value	Label
100000000	Directly open session
100000001	Screen pop with timeout
100000002	Screen pop with decline

msdyn_notificationscenarioplaceholder

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	Notification association with scenarios
DisplayName	notification scenario placeholder
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_notificationscenarioplaceholder
MaxLength	100
RequiredLevel	None
Type	String

msdyn_notificationtemplate_consult

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	Consult notification template scenario
DisplayName	Consult
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_notificationtemplate_consult
MaxLength	200
RequiredLevel	None

Property	Value
Type	String

msdyn_notificationtemplate_incoming_auth

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Incoming authenticated notification template scenario
DisplayName	Incoming authenticated
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_notificationtemplate_incoming_auth
MaxLength	200
RequiredLevel	None
Type	String

msdyn_notificationtemplate_incoming_unauth

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	Incoming unauthenticated notification template scenario
DisplayName	Incoming unauthenticated
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_notificationtemplate_incoming_unauth
MaxLength	200
RequiredLevel	None
Type	String

msdyn_notificationtemplate_supervisorassign

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	supervisorAssign notification template scenario
DisplayName	SupervisorAssign
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_notificationtemplate_supervisorassign
MaxLength	200
RequiredLevel	None
Type	String

msdyn_notificationtemplate_transfer

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	Transfer notification template scenario
DisplayName	Transfer
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_notificationtemplate_transfer
MaxLength	200
RequiredLevel	None
Type	String

msdyn_outboundqueueid

Property	Value
Description	Unique identifier for outbound queue associated with workstream
DisplayName	Outbound queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_outboundqueueid
RequiredLevel	None
Targets	queue
Type	Lookup

msdyn_recordidentificationrule

Property	Value
Description	Record identification rule associated to a workstream
DisplayName	Record Identification Rule

Property	Value
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_recordidentificationrule
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_RecordIdentificationValidationRule

Property	Value
Description	Record Identification Validation Rule
DisplayName	Record Identification Validation Rule
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_recordidentificationvalidationrule
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_restrictdownloadrecording

Property	Value
Description	Restrict download of recording
DisplayName	Restrict download of recording
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_restrictdownloadrecording
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_restrictdownloadrecording Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_restrictdownloadtranscript

Property	Value
Description	Restrict download of transcript
DisplayName	Restrict download of transcript
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_restrictdownloadtranscript
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_restrictdownloadtranscript Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_routingcontractid

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Link contracts with live work streams.
DisplayName	Contract Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routingcontractid
RequiredLevel	None
Targets	msdyn_decisioncontract
Type	Lookup

msdyn_Screenpoptimeout

Property	Value
Description	Time duration for which notification will be shown to agent.
DisplayName	Screen pop timeout
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_screenpoptimeout
MaxValue	2147483647

Property	Value
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_Screenpoptimeout_optionSet

Property	Value
Description	Time duration options for notification.
DisplayName	Screen pop timeout
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_screenpoptimeout_optionSet
RequiredLevel	None
Type	Picklist

msdyn_Screenpoptimeout_optionSet Choices/Options

Value	Label
30	30
60	60
90	90
120	120
150	150
180	180
210	210
240	240
270	270
300	300

msdyn_secureapikey

Added by: Omnichannel - SMS Patch Solution

Property	Value
Description	The secure API Key equivalent to password of account set up with TeleSign
DisplayName	Secure API Key
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_secureapikey

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_sessionscenarioplaceholder

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	Session association with scenarios
DisplayName	session scenario placeholder
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessionscenarioplaceholder
MaxLength	100
RequiredLevel	None
Type	String

msdyn_sessiontemplate_default

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Default session template scenario
DisplayName	Default
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessiontemplate_default
MaxLength	200
RequiredLevel	None
Type	String

msdyn_smsprovider

Added by: Omnichannel - SMS Patch Solution

Property	Value
Description	SMS Provider

Property	Value
DisplayName	SMS Provider
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_smsprovider
RequiredLevel	None
Type	Picklist

msdyn_smsprovider Choices/Options

Value	Label
192350000	TeleSign
192350001	Twilio

msdyn_streamsource

Property	Value
Description	The channel to which this workstream is attached
DisplayName	Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_streamsource
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_streamsource Choices/Options

Value	Label
19241000	Microsoft Teams
192300000	WhatsApp
192310000	LINE
192320000	WeChat
192330000	Facebook
192340000	SMS
192350000	Entity Records
192350001	Twitter
192350002	Custom
192360000	Live chat
192370000	Voice
192380000	Video
192390000	Co-browse

Value	Label
192400000	Screen sharing
192440000	Voice call
192450000	Apple Messages for Business
192450001	Google's Business Messages

msdyn_TelesignInboundURL

Added by: Omnichannel – SMS Solution

Property	Value
Description	URL for TeleSign Inbound link
DisplayName	TeleSign Inbound URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_telesigninboundurl
MaxLength	200
RequiredLevel	None
Type	String

msdyn_TwilioInboundURL

Added by: Omnichannel - SMS Patch Solution

Property	Value
Description	URL for Twilio Inbound link
DisplayName	Twilio Inbound URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_twilioinboundurl
MaxLength	200
RequiredLevel	None
Type	String

msdyn_waitingtimethreshold

Property	Value
Description	Declare the expected waiting time under which work items for this work stream should be assigned to agents

Property	Value
DisplayName	Waiting Time Threshold
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_waitingtimethreshold
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_workdistributionmode

Property	Value
Description	Specifies the mode i.e Push/Pick for the workstream
DisplayName	Work Distribution Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_workdistributionmode
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_workdistributionmode Choices/Options

Value	Label
192350000	Push
192350001	Pick

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Work stream
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active

Value	Label	DefaultStatus	InvariantName
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Work stream
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_bot_queueName
- msdyn_bot_userName
- msdyn_bot_userYomiName
- msdyn_defaultqueueName
- msdyn_entityroutingconfigurationIdName
- msdyn_masterentityroutingconfigurationidName
- msdyn_outboundqueueidName
- msdyn_routingcontractidName
- msdyn_skillattachmentrulescount
- msdyn_skillattachmentrulescount_Date
- msdyn_skillattachmentrulescount_State
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_bot_queueName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_bot_queuename

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

msdyn_bot_userName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_bot_username
MaxLength	200
RequiredLevel	None
Type	String

msdyn_bot_userYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_bot_useryominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_defaultqueueName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_defaultqueuename
MaxLength	200
RequiredLevel	None
Type	String

msdyn_entityroutingconfigurationIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_entityroutingconfigurationidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_masterentityroutingconfigurationidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_masterentityroutingconfigurationidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_outboundqueueidName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_outboundqueueidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_routingcontractidName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_routingcontractidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_skillattachmentrulescount

Added by: Omnichannel - Skill Based Routing Solution

Property	Value
Description	Skill Attachment Rules Count
DisplayName	Skill Attachment Rules Count
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_skillattachmentrulescount
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_skillattachmentrulescount_Date

Added by: Active Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	Last Updated time of rollup field Skill Attachment Rules Count.
DisplayName	Skill Attachment Rules Count (Last Updated On)
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_skillattachmentrulescount_date
RequiredLevel	None
Type	DateTime

msdyn_skillattachmentrulescount_State

Added by: Active Solution Solution

Property	Value
Description	State of rollup field Skill Attachment Rules Count.
DisplayName	Skill Attachment Rules Count (State)
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_skillattachmentrulescount_state
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number

Property	Value
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_liveworkstreamcapacityprofile Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Work stream capacity profile

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_liveworkstreamcapacityprofiles(*msdyn_liveworkstreamcapacityprofileid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_liveworkstreamcapacityprofiles See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_liveworkstreamcapacityprofiles(*msdyn_liveworkstreamcapacityprofileid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionReques
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_liveworkstreamcapacityprofiles(*msdyn_liveworkstreamcapacityprofileid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_liveworkstreamcapacityprofiles See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequ
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAnd
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_liveworkstreamcapacityprofiles(*msdyn_liveworkstreamcapacityprofileid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_liveworkstreamcapacityprofiles(*msdyn_liveworkstreamcapacityprofileid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_liveworkstreamcapacityprofiles
DisplayCollectionName	Work stream capacity profile
DisplayName	Work stream capacity profile
EntitySetName	msdyn_liveworkstreamcapacityprofiles
IsBPFEntity	False
LogicalCollectionName	msdyn_liveworkstreamcapacityprofiles
LogicalName	msdyn_liveworkstreamcapacityprofile

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_liveworkstreamcapacityprofileid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_liveworkstreamcapacityprofile

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_capacityProfile_id
- msdyn_liveworkstreamcapacityprofileId
- msdyn_name
- msdyn_workstream_id
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_capacityProfile_id

Property	Value
Description	
DisplayName	Capacity Profile
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_capacityprofile_id
RequiredLevel	ApplicationRequired
Targets	msdyn_capacityprofile

Property	Value
Type	Lookup

msdyn_liveworkstreamcapacityprofileId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Work stream Capacity profile
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_liveworkstreamcapacityprofileid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_workstream_id

Property	Value
Description	
DisplayName	Work Stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_workstream_id
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Work stream Capacity profile
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Work stream Capacity profile
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_capacityProfile_idName
- msdyn_workstream_idName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_capacityProfile_idName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_capacityprofile_idname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_workstream_idName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_workstream_idname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_localizedsurveyquestion Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_localizedsurveyquestions See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_localizedsurveyquestions(*msdyn_localizedsurveyquestionid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_localizedsurveyquestions(*msdyn_localizedsurveyquestionid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_localizedsurveyquestions See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_localizedsurveyquestions(*msdyn_localizedsurveyquestionid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_localizedsurveyquestions(*msdyn_localizedsurveyquestionid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_localizedsurveyquestions
DisplayCollectionName	Localized Survey Questions (Deprecated)
DisplayName	Localized Survey Question (Deprecated)
EntitySetName	msdyn_localizedsurveyquestions
IsBPFEntity	False
LogicalCollectionName	msdyn_localizedsurveyquestions
LogicalName	msdyn_localizedsurveyquestion
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_localizedsurveyquestionid
PrimaryNameAttribute	msdyn_name

Property	Value
SchemaName	msdyn_localizedsurveyquestion

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_Description
- msdyn_languagecode
- msdyn_LocalizedQuestionText
- msdyn_localizedsurveyquestionId
- msdyn_name
- msdyn_SurveyQuestionId
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_Description

Property	Value
Description	
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_languagecode

Property	Value
Description	
DisplayName	Language Code
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_languagecode
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_languagecode Options

Value	Label
100000001	English(en-US)
100000002	French(fr-FR)

msdyn_LocalizedQuestionText

Property	Value
Description	
DisplayName	Localized Question Text
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_localizedquestiontext
MaxLength	3000
RequiredLevel	ApplicationRequired
Type	Memo

msdyn_localizedsurveyquestionId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Localized Survey Question
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_localizedsurveyquestionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_SurveyQuestionId

Property	Value
Description	Unique identifier for Survey Question associated with Localized Survey Question.
DisplayName	Survey Question
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_surveyquestionid
RequiredLevel	ApplicationRequired
Targets	msdyn_surveyquestion
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Localized Survey Question
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Localized Survey Question
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_SurveyQuestionIdName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_SurveyQuestionIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	msdyn_surveyquestionidname
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn__surveyquestion_msdyn_localizedsurveyques

See msdyn_surveyquestion Entity msdyn__surveyquestion_msdyn_localizedsurveyques One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_maskingrule Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Masking Rules to apply to chat messages.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_maskingrules See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_maskingrules(*msdyn_maskingruleid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_maskingrules(*msdyn_maskingruleid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_maskingrules See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_maskingrules(*msdyn_maskingruleid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_maskingrules(*msdyn_maskingruleid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_maskingrules
DisplayCollectionName	Masking Rules
DisplayName	Masking Rule

Property	Value
EntitySetName	msdyn_maskingrules
IsBPFEntity	False
LogicalCollectionName	msdyn_maskingrules
LogicalName	msdyn_maskingrule
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_maskingruleid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_maskingrule

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_description
- msdyn_enter_test_data
- msdyn_masked_character
- msdyn_masked_test_data
- msdyn_maskingruleId
- msdyn_name
- msdyn_regular_expression
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_description

Property	Value
Description	Description of the masking rule
DisplayName	Description
FormatName	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	500
RequiredLevel	None
Type	String

msdyn_enter_test_data

Property	Value
Description	Test data to evaluate a masking rule
DisplayName	Enter Test Data
FormatName	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enter_test_data

Property	Value
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_masked_character

Property	Value
Description	Character to be masked
DisplayName	Masked Character
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_masked_character
MaxLength	1
RequiredLevel	None
Type	String

msdyn_masked_test_data

Property	Value
Description	Test data evaluated by a masking rule
DisplayName	Masked Test Data
FormatName	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_masked_test_data
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_maskingruleId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Masking Rule
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_maskingruleid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_regular_expression

Property	Value
Description	Regular Expression in Javascript
DisplayName	Regular Expression
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_regular_expression
MaxLength	500
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Masking Rule
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode

Property	Value
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Masking Rule
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName

- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_macroactiontemplate Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Attributes for macro action template

Added by: Macros Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_macroactiontemplates(*msdyn_macroactiontemplateid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_macroactiontemplates See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_macroactiontemplates(*msdyn_macroactiontemplateid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_macroactiontemplates(*msdyn_macroactiontemplateid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_macroactiontemplates See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_macroactiontemplates(*msdyn_macroactiontemplateid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_macroactiontemplates(*msdyn_macroactiontemplateid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_macroactiontemplates
DisplayCollectionName	Macro Action Templates
DisplayName	Macro Action Template
EntitySetName	msdyn_macroactiontemplates
IsBPFEntity	False
LogicalCollectionName	msdyn_macroactiontemplates
LogicalName	msdyn_macroactiontemplate

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_macroactiontemplateid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_macroactiontemplate

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_actionDescription
- msdyn_brandcolor
- msdyn_displayname
- msdyn_icon
- msdyn_InputParameters
- msdyn_kind
- msdyn_macroactiontemplateId
- msdyn_macroconnector
- msdyn_name
- msdyn_OutputParameters
- msdyn_runtimeapi
- msdyn_subtitle
- msdyn_summary
- msdyn_title
- msdyn_visibility
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_actionDescription

Property	Value

Property	Value
Description	The description of this macro action.
DisplayName	Description
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_actionDescription
MaxLength	100
RequiredLevel	None
Type	String

msdyn_brandcolor

Property	Value
Description	Unique value to set the brand color
DisplayName	Brand Color
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_brandcolor
MaxLength	100
RequiredLevel	None
Type	String

msdyn_displayname

Property	Value
Description	Unique value to set the display name
DisplayName	Display Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_displayname
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_icon

Property	Value
Description	Unique value to set the icon

Property	Value
DisplayName	Icon
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_icon
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_InputParameters

Property	Value
Description	Input parameters for the macro action template
DisplayName	Input Parameters
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_inputparameters
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_kind

Property	Value
Description	Kind is either 'TRIGGERS' or 'ACTIONS'
DisplayName	Kind
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_kind
MaxLength	1000
RequiredLevel	ApplicationRequired
Type	String

msdyn_macroactiontemplateId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Macro Action Template

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_macroactiontemplateid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_macroconnector

Property	Value
Description	Sets the value of macro connector
DisplayName	FUNDU_MACRO_CONNECTOR
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_macroconnector
RequiredLevel	None
Targets	msdyn_macroconnector
Type	Lookup

msdyn_name

Property	Value
Description	The name of this Macro template.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_OutputParameters

Property	Value
Description	Output parameters for macro action template entity
DisplayName	Output Parameters
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_outputparameters

Property	Value
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_runtimeapi

Property	Value
Description	Function to be executed at runtime
DisplayName	Runtime API
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_runtimeapi
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_subtitle

Property	Value
Description	Unique value to set the subtitle value
DisplayName	Subtitle
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_subtitle
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_summary

Property	Value
Description	Unique value to set the summary
DisplayName	Summary
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_summary
MaxLength	2000

Property	Value
RequiredLevel	None
Type	String

msdyn_title

Property	Value
Description	The title of this macro action.
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_title
MaxLength	100
RequiredLevel	None
Type	String

msdyn_visibility

Property	Value
Description	Unique value to set the visibility value
DisplayName	Visibility
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_visibility
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None

Property	Value
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Macro Action Template
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active

Value	Label	DefaultStatus	InvariantName
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Macro Action Template
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1

Property	Value
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_macroconnectorName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.

Property	Value
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_macroconnectorName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_macroconnectorname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_msdyn_macroactiontemplate_msdyn_actioninput
- msdyn_msdyn_macroactiontemplate_msdyn_actionout

msdyn_msdyn_macroactiontemplate_msdyn_actioninput

Same as msdyn_actioninputparameter entity msdyn_msdyn_macroactiontemplate_msdyn_actioninput Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_actioninputparameter
ReferencingAttribute	msdyn_actiontemplateinputparameterid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_macroactiontemplate_msdyn_actioninput
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_macroactiontemplate_msdyn_actionout

Same as msdyn_actionoutputparameter entity msdyn_msdyn_macroactiontemplate_msdyn_actionout Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_actionoutputparameter
ReferencingAttribute	msdyn_actiontemplateoutputparameterid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_macroactiontemplate_msdyn_actionout
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_macroconnector_msdyn_macroactiontemplate_macroconnector

See msdyn_macroconnector Entity msdyn_msdyn_macroconnector_msdyn_macroactiontemplate_macroconnector One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_macroconnector Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Attributes for macro connectors

Added by: Macros Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_macroconnectors(*msdyn_macroconnectorid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_macroconnectors See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_macroconnectors(*msdyn_macroconnectorid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_macroconnectors(*msdyn_macroconnectorid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_macroconnectors See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_macroconnectors(*msdyn_macroconnectorid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_macroconnectors(*msdyn_macroconnectorid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_macroconnectors
DisplayCollectionName	macroconnectors
DisplayName	Macro Connector
EntitySetName	msdyn_macroconnectors
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_macroconnectors
LogicalName	msdyn_macroconnector
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_macroconnectorid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_macroconnector

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_brandcolor
- msdyn_callback
- msdyn_categorykey
- msdyn_categorylabel
- msdyn_description
- msdyn_displayname
- msdyn_Icon
- msdyn_macroconnectorId
- msdyn_name
- msdyn_prefix
- msdyn_title
- msdyn_type
- msdyn_webresourcename
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_brandcolor

Property	Value
Description	The color in which tile for this connector is rendered
DisplayName	Brand Color
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_brandcolor
MaxLength	20
RequiredLevel	None
Type	String

msdyn_callback

Property	Value
Description	Sets the callback value
DisplayName	Callback
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_callback
MaxLength	100
RequiredLevel	None
Type	String

msdyn_categorykey

Property	Value
Description	A string label for the category under which this connector should be rendered
DisplayName	Category key
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_categorykey
MaxLength	100
RequiredLevel	None
Type	String

msdyn_categorylabel

Property	Value
Description	Textual display text for the category key under which this connector is to be displayed
DisplayName	Category Label
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_categorylabel
MaxLength	100
RequiredLevel	None
Type	String

msdyn_description

Property	Value
Description	Text describing this connector displayed in the designer
DisplayName	Description
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_displayname

Property	Value
Description	The display name for this connector in the designer
DisplayName	Display Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_displayname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Icon

Property	Value
Description	Icon URL to be rendered for this connector
DisplayName	Icon
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_icon
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_macroconnectorId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Macro Connector
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_macroconnectorid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_prefix

Property	Value
Description	Sets the prefix value
DisplayName	Prefix
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_prefix
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_title

Property	Value
Description	The title displayed on the desginer for this connector
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_title
MaxLength	100
RequiredLevel	None
Type	String

msdyn_type

Property	Value
Description	The type of this connector
DisplayName	Type
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
MaxLength	100
RequiredLevel	None
Type	String

msdyn_webresourcename

Property	Value
Description	Unique identifier for webresource name
DisplayName	Webresource Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_webresourcename
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Macro Connector
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Macro Connector
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName

- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None

Property	Value
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record

Property	Value
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_macroconnector_msdyn_macroactiontemplate_macroconnector

Same as msdyn_macroactiontemplate entity msdyn_msdyn_macroconnector_msdyn_macroactiontemplate_macroconnector Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_macroactiontemplate
ReferencingAttribute	msdyn_macroconnector
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_macroconnector_msdyn_macroactiontemplate_macroconnector
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_macrosession Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores history of macro runs

Added by: Macros Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_macrosessions(*msdyn_macrosessionid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_macrosessions See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_macrosessions(*msdyn_macrosessionid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_macrosessions(*msdyn_macrosessionid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_macrosessions See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_macrosessions(*msdyn_macrosessionid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_macrosessions(*msdyn_macrosessionid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_macrosessions
DisplayCollectionName	Macro Run Histories
DisplayName	Macro Run History

Property	Value
EntitySetName	msdyn_macrosessions
IsBPFEntity	False
LogicalCollectionName	msdyn_macrosessions
LogicalName	msdyn_macrosession
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_macrosessionid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_macrosession

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_executioncontext
- msdyn_macroname
- msdyn_macrosessionId
- msdyn_name
- msdyn_status
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_executioncontext

Property	Value
Description	Stores execution JSON for the macro
DisplayName	Execution data
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_executioncontext
MaxLength	1000000
RequiredLevel	None
Type	Memo

msdyn_macroname

Property	Value
Description	Lookup field for the macro for which the session is created
DisplayName	Macro name
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_macroname
RequiredLevel	None
Targets	workflow
Type	Lookup

msdyn_macrosessionId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Macro Run History ID
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_macrosessionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_name

Property	Value
Description	The name of the custom entity.

Property	Value
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_status

Property	Value
Description	Stores whether macro succeeded or failed
DisplayName	Macro status
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_status
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	User
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the macrosrunhistory
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the macrosrunhistory
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_macronameName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Executed on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_macronameName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	msdyn_macronamename
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_macrosolutionconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Macro solution related configurations

Added by: Macros Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_macrosolutionconfigurations(*msdyn_macrosolutionconfigurationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_macrosolutionconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_macrosolutionconfigurations(*msdyn_macrosolutionconfigurationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_macrosolutionconfigurations(*msdyn_macrosolutionconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_macrosolutionconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_macrosolutionconfigurations(*msdyn_macrosolutionconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_macrosolutionconfigurations(*msdyn_macrosolutionconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_macrosolutionconfigurations
DisplayCollectionName	Macro Solution Configurations
DisplayName	Macro Solution Configuration
EntitySetName	msdyn_macrosolutionconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_macrosolutionconfigurations
LogicalName	msdyn_macrosolutionconfiguration

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_macrosolutionconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_macrosolutionconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_designerfallbackurl
- msdyn_designerurlconfigentity
- msdyn_designerurlconfigentityattrib
- msdyn_designerurlconfigentityid
- msdyn_designerurlconfigentityquery
- msdyn_designerurlrelativepath
- msdyn_macrosolutionconfigurationId
- msdyn_macrosversion
- msdyn_name
- msdyn_searchhint
- msdyn_uservoicelink
- msdyn_uservoicetext
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_designerfallbackurl

Property	Value
Description	Sets designer fallback url
DisplayName	Designer Blob URL

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_designerfallbackurl
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_designerurlconfigentity

Property	Value
Description	Sets the entity from which to read designer URL
DisplayName	Entity from which to read designer URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_designerurlconfigentity
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_designerurlconfigentityattrib

Property	Value
Description	Sets the attributes of designer url config entity
DisplayName	Attribute from which to read designer URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_designerurlconfigentityattrib
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_designerurlconfigentityid

Property	Value
Description	Sets the id from which to read designer URL
DisplayName	Record Id from which to read designer URL
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_designerurlconfigentityid
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_designerurlconfigentityquery

Property	Value
Description	An oData query to retrieve record from which to read designer URL
DisplayName	An oData query to retrieve record from which to read designer URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_designerurlconfigentityquery
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_designerurlrelativepath

Property	Value
Description	Sets the path to designer blob with designer URL
DisplayName	Relative path to designer blob within the designer URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_designerurlrelativepath
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_macrosolutionconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Macro Solution Configuration
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	msdyn_macrosolutionconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_macrosversion

Property	Value
Description	Macro solution version
DisplayName	msdyn_macrosversion
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_macrosversion
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_searchhint

Property	Value
Description	Sets the value for serach hint
DisplayName	Search Hint Text
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_searchhint

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_uservoicelink

Property	Value
Description	Sets the value for user voice link
DisplayName	User Voice Link
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_uservoicelink
MaxLength	1024
RequiredLevel	None
Type	String

msdyn_uservoicetext

Property	Value
Description	Sets the value for user voice text
DisplayName	User Voice Text
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_uservoicetext
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon

Property	Value
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Macro Solution Configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Macro Solution Configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.

Property	Value
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_oc_geolocationprovider Entity Reference

Article • 03/17/2023

> **Note**
>
> Unsure about table vs. entity? See **Developers: Understand terminology in Microsoft Dataverse**. Geo Location Providers

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_oc_geolocationproviders(*msdyn_oc_geolocationproviderid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_oc_geolocationproviders See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_oc_geolocationproviders(*msdyn_oc_geolocationproviderid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_oc_geolocationproviders(*msdyn_oc_geolocationproviderid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_oc_geolocationproviders See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReque
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_oc_geolocationproviders(*msdyn_oc_geolocationproviderid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_oc_geolocationproviders(*msdyn_oc_geolocationproviderid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_oc_geolocationproviders
DisplayCollectionName	Geo Location Providers
DisplayName	Geo Location Provider
EntitySetName	msdyn_oc_geolocationproviders
IsBPFEntity	False
LogicalCollectionName	msdyn_oc_geolocationproviders

Property	Value
LogicalName	msdyn_oc_geolocationprovider
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_oc_geolocationproviderid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_oc_geolocationprovider

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_oc_geolocationproviderId
- msdyn_providerapikey
- msdyn_providerapikeyversion
- msdyn_providername
- msdyn_secureproviderapikey
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_oc_geolocationproviderId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Geo Location Provider
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_oc_geolocationproviderid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_providerapikey

Property	Value
Description	Geo Location Provider API key
DisplayName	Bing Maps API key
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_providerapikey
MaxLength	300
RequiredLevel	ApplicationRequired
Type	String

msdyn_providerapikeyversion

Property	Value
Description	Provider API Key Version
DisplayName	Provider API Key Version
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_providerapikeyversion
MaxValue	2147483647
MinValue	0

Property	Value
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_providername

Property	Value
Description	Geo Location Provider Name
DisplayName	Provider name
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_providername
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_providername Choices/Options

Value	Label
192350000	Bing
192350001	Google
192350002	HERE

msdyn_secureproviderapikey

Property	Value
Description	Geo Location Secure Provider API key
DisplayName	Secure Bing Maps API key
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_secureproviderapikey
MaxLength	300
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Geo Location Provider
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Geo Location Provider
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.

Property	Value
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocapplepay Entity Reference

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - SocialChannels Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocapplepaies(*msdyn_ocapplepayid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocapplepaies See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocapplepaies(*msdyn_ocapplepayid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocapplepaies(*msdyn_ocapplepayid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocapplepaies See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocapplepaies(*msdyn_ocapplepayid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocapplepaies(*msdyn_ocapplepayid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_ocapplepaies
DisplayCollectionName	ocapplepay

Property	Value
DisplayName	OC Apple Pay Entity
EntitySetName	msdyn_ocapplepaies
IsBPFEntity	False
LogicalCollectionName	msdyn_ocapplepaies
LogicalName	msdyn_ocapplepay
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocapplepayid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocapplepay

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_countrycode
- msdyn_fallbackurl
- msdyn_merchantcapabilities
- msdyn_merchantdisplayname
- msdyn_merchantid
- msdyn_name
- msdyn_ocapplepayId
- msdyn_ocbase64merchantcertstring
- msdyn_ocbase64merchantcertstringcontd
- msdyn_ocmerchantcertfilename
- msdyn_ocmerchantcertificatepassword
- msdyn_ocmerchantdomainurl
- msdyn_ordertrackingurl
- msdyn_paymentgatewayurl
- msdyn_paymentmethodupdateurl
- msdyn_shippingcontactupdateurl
- msdyn_shippingmethodupdateurl
- msdyn_supportednetworks
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number

Property	Value
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_countrycode

Property	Value
Description	Merchant Country Code
DisplayName	Country Code
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_countrycode
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_fallbackurl

Property	Value
Description	
DisplayName	Fallback URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fallbackurl
MaxLength	100
RequiredLevel	None
Type	String

msdyn_merchantcapabilities

Property	Value
Description	
DisplayName	Merchant Capabilities
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_merchantcapabilities
RequiredLevel	ApplicationRequired
Type	MultiSelectPicklist

msdyn_merchantcapabilities Choices/Options

Value	Label
192350000	Debit
192350001	Credit
192350002	3D Secure

msdyn_merchantdisplayname

Property	Value
Description	Merchant display name or domain name
DisplayName	Merchant Display Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_merchantdisplayname
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_merchantid

Property	Value
Description	Apple Pay Merchant ID
DisplayName	Merchant ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_merchantid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocapplepayId

Property	Value
Description	Unique identifier for entity instances
DisplayName	OC Apple Pay Entity
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocapplepayid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocbase64merchantcertstring

Property	Value
Description	The Apple Pay Merchant Certificate (Base 64 string)
DisplayName	The Apple Pay Merchant Certificate
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocbase64merchantcertstring
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_ocbase64merchantcertstringcontd

Property	Value
Description	The Apple Pay Merchant Certificate (Base 64 string)
DisplayName	The Apple Pay Merchant Certificate - Continued
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocbase64merchantcertstringcontd
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_ocmerchantcertfilename

Property	Value
Description	Merchant Certificate File Name
DisplayName	Merchant Certificate File Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocmerchantcertfilename
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocmerchantcertificatepassword

Property	Value
Description	The password for the Apple Pay Merchant certificate
DisplayName	Merchant Certificate Password
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocmerchantcertificatepassword
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocmerchantdomainurl

Property	Value
Description	Merchant Domain URL
DisplayName	Merchant Domain URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocmerchantdomainurl
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_ordertrackingurl

Property	Value
Description	Order Tracking URL
DisplayName	Order Tracking URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ordertrackingurl
MaxLength	300
RequiredLevel	None

Property	Value
Type	String

msdyn_paymentgatewayurl

Property	Value
Description	The URL of the payment service provider
DisplayName	Payment Gateway URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_paymentgatewayurl
MaxLength	300
RequiredLevel	ApplicationRequired
Type	String

msdyn_paymentmethodupdateurl

Property	Value
Description	The URL that Apple calls into when payment method is updated
DisplayName	Payment Method Update URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_paymentmethodupdateurl
MaxLength	300
RequiredLevel	None
Type	String

msdyn_shippingcontactupdateurl

Property	Value
Description	The URL that Apple will call into when there is a shipping contact update
DisplayName	Shipping Contact Update URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_shippingcontactupdateurl
MaxLength	300
RequiredLevel	None
Type	String

msdyn_shippingmethodupdateurl

Property	Value
Description	
DisplayName	Shipping Method Update URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_shippingmethodupdateurl
MaxLength	300
RequiredLevel	None
Type	String

msdyn_supportednetworks

Property	Value
Description	
DisplayName	Supported Networks
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_supportednetworks
RequiredLevel	ApplicationRequired
Type	MultiSelectPicklist

msdyn_supportednetworks Choices/Options

Value	Label
192350000	American Express
192350001	Visa
192350002	Discover
192350003	MasterCard

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the OC Apple Pay Entity
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the OC Apple Pay Entity
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName

- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocbotchannelregistration table/entity reference

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Bot channel registration used for channel integration

Added by: Omnichannel Shared Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrations(*msdyn_ocbotchannelregistrationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrations See Create	CreateRequest or Create
CreateMultiple		CreateMultipleReque
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrations(*msdyn_ocbotchannelregistrationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransition
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
msdyn_RetrieveCustomMessagingApplicationSecret	Microsoft.Dynamics.CRM.msdyn_RetrieveCustomMessagingApplicationSecret	Type generated by Cr OrganizationRequest parameters for the m
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrations(*msdyn_ocbotchannelregistrationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrations See Query Data	RetrieveMultipleRequ RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAcce
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincip
RevokeAccess	RevokeAccess Action	RevokeAccessReques
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrations(*msdyn_ocbotchannelregistrationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrations(*msdyn_ocbotchannelregistrationid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleReque

Properties

Property	Value
CollectionSchemaName	msdyn_ocbotchannelregistrations
DisplayCollectionName	Custom messaging accounts
DisplayName	Custom messaging account

Property	Value
EntitySetName	msdyn_ocbotchannelregistrations
IsBPFEntity	False
LogicalCollectionName	msdyn_ocbotchannelregistrations
LogicalName	msdyn_ocbotchannelregistration
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocbotchannelregistrationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocbotchannelregistration

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_communicationprovidersettingid
- msdyn_iscustommessagingbcr
- msdyn_iscustommessagingcreated
- msdyn_lastvalidateddate
- msdyn_messagingendpoint
- msdyn_msappid
- msdyn_msappsecret
- msdyn_name
- msdyn_ocbotchannelregistrationId
- msdyn_ocfbapplicationid
- msdyn_ocgbmagentaccount
- msdyn_ocgbmpartneraccount
- msdyn_oclinechannelconfigid
- msdyn_octeamschannelconfigid
- msdyn_securemsappsecret
- msdyn_validationstatus
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

msdyn_communicationprovidersettingid

Added by: Omnichannel Shared CommunicationBase Solution

Property	Value
Description	Unique identifier for Communication Provider Setting associated with Bot Channel Registration.
DisplayName	Communication provider setting id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_communicationprovidersettingid
RequiredLevel	None
Targets	msdyn_occommunicationprovidersetting
Type	Lookup

msdyn_iscustommessagingbcr

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Flag to indicate if BCR entity is related to Custom Messaging
DisplayName	Is Custom Messaging BCR
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_iscustommessagingbcr
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_iscustommessagingbcr Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_iscustommessagingcreated

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Flag to indicate if the record is newly created
DisplayName	Is Custom Messaging Created
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_iscustommessagingcreated
RequiredLevel	None
Type	Boolean

msdyn_iscustommessagingcreated Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_lastvalidateddate

Added by: Omnichannel – SocialChannels Solution

Property	Value
DateTimeBehavior	UserLocal
Description	Microsoft app Id and secret last validated date.
DisplayName	Last validated
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_lastvalidateddate
RequiredLevel	ApplicationRequired
Type	DateTime

msdyn_messagingendpoint

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Messaging Endpoint (URL)
DisplayName	Messaging Endpoint (URL)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_messagingendpoint
MaxLength	500
RequiredLevel	None
Type	String

msdyn_msappid

Property	Value

Property	Value
Description	MS Application ID for the BCR
DisplayName	MS Application Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_msappid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_msappsecret

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Bot channel registration client secret
DisplayName	Client secret
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_msappsecret
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocbotchannelregistrationId

Property	Value

Property	Value
Description	Unique identifier for entity instances
DisplayName	Bot Channel Registration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocbotchannelregistrationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocfbapplicationid

Added by: Omnichannel – Facebook Solution

Property	Value
Description	Related Facebook application
DisplayName	Facebook application
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocfbapplicationid
RequiredLevel	None
Targets	msdyn_ocfbapplication
Type	Lookup

msdyn_ocgbmagentaccount

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Google's Business Messages agent account id for the BCR
DisplayName	Google's Business Messages agent account id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocgbmagentaccount
RequiredLevel	None
Targets	msdyn_ocgooglebusinessmessagesagentaccount
Type	Lookup

msdyn_ocgbmpartneraccount

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Google's Business Messages partner account id of the BCR
DisplayName	Google's Business Messages partner account id
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_ocgbmpartneraccount
RequiredLevel	None
Targets	msdyn_ocgooglebusinessmessagespartneraccount
Type	Lookup

msdyn_oclinechannelconfigid

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Related Line Channel
DisplayName	Line Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_oclinechannelconfigid
RequiredLevel	None
Targets	msdyn_oclinechannelconfig
Type	Lookup

msdyn_octeamschannelconfigid

Added by: Omnichannel - Teams Solution

Property	Value
Description	Related Teams Channel
DisplayName	Teams Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_octeamschannelconfigid
RequiredLevel	None
Targets	msdyn_octeamschannelconfig
Type	Lookup

msdyn_securemsappsecret

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Bot channel registration secure client secret
DisplayName	Secure Client secret
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_securemsappsecret
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_validationstatus

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Microsoft app ID and secert Validation status
DisplayName	Validation status
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_validationstatus
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Bot Channel Registration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Bot Channel Registration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode

Property	Value
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy

- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_communicationprovidersettingidName
- msdyn_ocfbapplicationidName
- msdyn_ocgbmagentaccountName
- msdyn_ocgbmpartneraccountName
- msdyn_oclinechannelconfigidName
- msdyn_octeamschannelconfigidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_communicationprovidersettingidName

Added by: Omnichannel Shared CommunicationBase Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_communicationprovidersettingidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocfbapplicationidName

Added by: Omnichannel – Facebook Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocfbapplicationidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocgbmagentaccountName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocgbmagentaccountname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocgbmpartneraccountName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocgbmpartneraccountname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_oclinechannelconfigidName

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_oclinechannelconfigidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_octeamschannelconfigidName

Added by: Omnichannel - Teams Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_octeamschannelconfigidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related table. Listed by **SchemaName**.

- msdyn_msdyn_occommunicationprovidersetting_msdyn_ocbotchannelregistration_communicationprovider
- msdyn_msdyn_ocgbmpartneraccount_msdyn_ocbotchannelregistration_ocgbmpartneraccount

msdyn_msdyn_occommunicationprovidersetting_msdyn_ocbotchannelregistration_communicati

Added by: Omnichannel Shared CommunicationBase Solution

See msdyn_occommunicationprovidersetting Table
msdyn_msdyn_occommunicationprovidersetting_msdyn_ocbotchannelregistration_communicationprovider One-To-Many relationship.

msdyn_msdyn_ocgbmpartneraccount_msdyn_ocbotchannelregistration_ocgbmpartneraccount

Added by: Omnichannel - SocialChannels Patch Solution

See msdyn_ocgooglebusinessmessagespartneraccount Table
msdyn_msdyn_ocgbmpartneraccount_msdyn_ocbotchannelregistration_ocgbmpartneraccount One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocbotchannelregistrationsecret Entity Reference

Article • 03/17/2023

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrationsecrets(*msdyn_ocbotchannelregistrationsecretid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrationsecrets See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrationsecrets(*msdyn_ocbotchannelregistrationsecretid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequ
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrationsecrets(*msdyn_ocbotchannelregistrationsecretid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrationsecrets See Query Data	RetrieveMultipleRequest o RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRe
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsA
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrationsecrets(*msdyn_ocbotchannelregistrationsecretid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocbotchannelregistrationsecrets(*msdyn_ocbotchannelregistrationsecretid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_ocbotchannelregistrationsecrets
DisplayCollectionName	Bot Channel Registration Secrets
DisplayName	Bot Channel Registration Secret
EntitySetName	msdyn_ocbotchannelregistrationsecrets
IsBPFEntity	False
LogicalCollectionName	msdyn_ocbotchannelregistrationsecrets
LogicalName	msdyn_ocbotchannelregistrationsecret
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocbotchannelregistrationsecretid

Property	Value
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocbotchannelregistrationsecret

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_ocbotchannelregistrationid
- msdyn_ocbotchannelregistrationsecretId
- msdyn_securemsappsecret
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired

Property	Value
Type	String

msdyn_ocbotchannelregistrationid

Property	Value
Description	
DisplayName	Bot Channel Registration Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocbotchannelregistrationid
RequiredLevel	None
Targets	msdyn_ocbotchannelregistration
Type	Lookup

msdyn_ocbotchannelregistrationsecretId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Bot Channel Registration Secret
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocbotchannelregistrationsecretid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_securemsappsecret

Property	Value
Description	
DisplayName	Secure MS App secret
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_securemsappsecret
MaxLength	600
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Bot Channel Registration Secret
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Bot Channel Registration Secret
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ocbotchannelregistrationidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ocbotchannelregistrationidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocbotchannelregistrationidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_occhannelconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Channel Configuration

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations(*msdyn_occhannelconfigurationid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations(*msdyn_occhannelconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations(*msdyn_occhannelconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations(*msdyn_occhannelconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_occhannelconfigurations
DisplayCollectionName	Channel Configurations
DisplayName	Channel Configuration
EntitySetName	msdyn_occhannelconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_occhannelconfigurations
LogicalName	msdyn_occhannelconfiguration
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_occhannelconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_occhannelconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_closeconversationifoooh
- msdyn_enabletransfertoooohqueue

- msdyn_engagementcontext
- msdyn_name
- msdyn_occhannelconfigurationId
- msdyn_privacytermsaccepted
- msdyn_privacytermsversion
- msdyn_streamsource
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_closeconversationifoooh

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Specifies whether the conversation should be closed when it is created out of operating hours
DisplayName	Close Conversation If Outside Of OperatingHours
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_closeconversationifoooh
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_closeconversationifoooh Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enabletransfertoooohqueue

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Specifies whether the conversation can be transferred to an out of operating hour queue
DisplayName	Enable Transfer to Outside Of OperatingHours Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enabletransfertoooohqueue
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enabletransfertoooohqueue Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_engagementcontext

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Entity carrying the engagement context details of the channel.
DisplayName	Engagement Context
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_engagementcontext
MaxLength	128
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100

Property	Value
RequiredLevel	ApplicationRequired
Type	String

msdyn_occhannelconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Channel Configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_occhannelconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_privacytermsaccepted

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Indicates whether the Privacy Terms has been accepted by the user or not.
DisplayName	Privacy terms accepted
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_privacytermsaccepted
RequiredLevel	None
Type	Boolean

msdyn_privacytermsaccepted Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_privacytermsversion

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	The version of the privacy terms.
DisplayName	Privacy terms version
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_privacytermsversion
MaxLength	20
RequiredLevel	None
Type	String

msdyn_streamsource

Property	Value
Description	Stream source of the channel e.g. LiveChat, SMS, Facebook etc
DisplayName	Stream Source
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_streamsource
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_streamsource Options

Value	Label
19241000	Microsoft Teams
192300000	WhatsApp
192310000	LINE
192320000	WeChat
192330000	Facebook
192340000	SMS
192350000	Entity Records
192350001	Twitter
192350002	Custom
192360000	Live chat
192370000	Voice
192380000	Video
192390000	Co-browse
192400000	Screen sharing

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False

Property	Value
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Channel Configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Channel Configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_occhannelconfiguration_msdyn_occhannelstateconfiguration_occhannelconfigura

Same as msdyn_occhannelstateconfiguration entity
msdyn_msdyn_occhannelconfiguration_msdyn_occhannelstateconfiguration_occhannelconfigurationid Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_occhannelstateconfiguration
ReferencingAttribute	msdyn_occhannelconfigurationid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_occhannelconfiguration_msdyn_occhannelstateconfiguration_occhannelconfigurationid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_occhannelstateconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Channel State Configuration

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations(*msdyn_occhannelconfigurationid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations(*msdyn_occhannelconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations(*msdyn_occhannelconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_occhannelconfigurations(*msdyn_occhannelconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_occhannelstateconfigurations
DisplayCollectionName	Channel State Configurations
DisplayName	Channel State Configuration
EntitySetName	msdyn_occhannelstateconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_occhannelstateconfigurations
LogicalName	msdyn_occhannelstateconfiguration
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_occhannelstateconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_occhannelstateconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_autocloseliveworkitemafter
- msdyn_name

- msdyn_occhannelconfigurationid
- msdyn_occhannelstateconfigurationId
- msdyn_ocliveworkitemstate
- msdyn_showconfirmationonsessionclose
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_autocloseliveworkitemafter

Property	Value
Description	Time duration in minutes after which the work item becomes target for auto closure
DisplayName	Auto close conversation after
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_autocloseliveworkitemafter
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_occhannelconfigurationid

Property	Value
Description	Unique Identifier of the associated channel configuration
DisplayName	Channel Configuration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_occhannelconfigurationid
RequiredLevel	ApplicationRequired
Targets	msdyn_occhannelconfiguration
Type	Lookup

msdyn_occhannelstateconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Channel State Configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_occhannelstateconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocliveworkitemstate

Property	Value
Description	State of the conversation where the config is applicable
DisplayName	Conversation State
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemstate
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_ocliveworkitemstate Options

Value	Label
0	Open
1	Active
2	Waiting
3	Closed
4	Wrap-up

msdyn_showconfirmationonsessionclose

Property	Value
Description	(Currently unused)
DisplayName	Show confirmation on session close
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_showconfirmationonsessionclose
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_showconfirmationonsessionclose Options

Value	Label
1	Yes
0	No

DefaultValue: False

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Channel State Configuration
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Channel State Configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_occhannelconfigurationidName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_occhannelconfigurationidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_occhannelconfigurationidname
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_occhannelconfiguration_msdyn_occhannelstateconfiguration_occhannelconfigura

See msdyn_occhannelconfiguration Entity
msdyn_msdyn_occhannelconfiguration_msdyn_occhannelstateconfiguration_occhannelconfigurationid One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_occommunicationprovidersetting Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel Shared CommunicationBase Solution

Messages

Message	Web API Operation	SDK Assem
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettings(*msdyn_occommunicationprovidersettingid*) Update `ownerid` property.	AssignRequ
Create	POST [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettings See Create	CreateRequ Create
CreateMultiple		CreateMulti
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettings(*msdyn_occommunicationprovidersettingid*) See Delete	DeleteRequ Delete
GrantAccess	GrantAccess Action	GrantAccess
IsValidStateTransition	IsValidStateTransition Function	IsValidState
ModifyAccess	ModifyAccess Action	ModifyAcce
msdyn_TelephonyResourceDeprovisionAction	Microsoft.Dynamics.CRM.msdyn_TelephonyResourceDeprovisionAction	Type genera Organizatio parameters
msdyn_TelephonyResourceProvisionAction	Microsoft.Dynamics.CRM.msdyn_TelephonyResourceProvisionAction	Type genera Organizatio parameters
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettings(*msdyn_occommunicationprovidersettingid*) See Retrieve	RetrieveReq Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettings See Query Data	RetrieveMul RetrieveMul
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrin
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSha
RevokeAccess	RevokeAccess Action	RevokeAcce
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettings(*msdyn_occommunicationprovidersettingid*) Update `statecode` and `statuscode` properties.	SetStateReq
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettings(*msdyn_occommunicationprovidersettingid*) See Update	UpdateRequ Update
UpdateMultiple		UpdateMult

Properties

Property	Value
CollectionSchemaName	msdyn_occommunicationprovidersettings
DisplayCollectionName	Communication Provider Settings

Property	Value
DisplayName	Communication Provider Setting
EntitySetName	msdyn_occommunicationprovidersettings
IsBPFEntity	False
LogicalCollectionName	msdyn_occommunicationprovidersettings
LogicalName	msdyn_occommunicationprovidersetting
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_occommunicationprovidersettingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_occommunicationprovidersetting

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_AccountSID
- msdyn_appmodule
- msdyn_isTrial
- msdyn_name
- msdyn_OcCommunicationProvider
- msdyn_occommunicationprovidersettingId
- msdyn_Secret
- msdyn_securesecret
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_AccountSID

Property	Value

Property	Value
Description	Account SID
DisplayName	Account SID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_accountsid
MaxLength	800
RequiredLevel	None
Type	String

msdyn_appmodule

Added by: Omnichannel - CommunicationBase Solution

Property	Value
Description	Application module picklist
DisplayName	Application module
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_appmodule
RequiredLevel	None
Type	MultiSelectPicklist

msdyn_appmodule Choices/Options

Value	Label
192350000	Service

msdyn_isTrial

Property	Value
Description	Flag specifying whether account is trial or not.
DisplayName	isTrial
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_istrial
RequiredLevel	None
Type	Boolean

msdyn_isTrial Choices/Options

Value	Label
1	Yes

Value	Label
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_OcCommunicationProvider

Property	Value
Description	Communication provider picklist
DisplayName	Communication Provider
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_occommunicationprovider
RequiredLevel	None
Type	Picklist

msdyn_OcCommunicationProvider Choices/Options

Value	Label
192350000	Azure Communication Services
192350001	Twilio
192350002	TeleSign

msdyn_occommunicationprovidersettingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Communication Provider Setting
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	msdyn_occommunicationprovidersettingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Secret

Property	Value
Description	Authtoken or connectionstring
DisplayName	Secret
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_secret
MaxLength	100
RequiredLevel	None
Type	String

msdyn_securesecret

Property	Value
Description	Secure Authtoken or connectionstring value
DisplayName	Secure Secret value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_securesecret
MaxLength	4000
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon

Property	Value
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Communication Provider Setting
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Communication Provider Setting
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.

Property	Value
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_occommunicationprovidersetting_msdyn_ocbotchannelregistration_communicati

Same as msdyn_ocbotchannelregistration table
msdyn_msdyn_occommunicationprovidersetting_msdyn_ocbotchannelregistration_communicationprovider Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocbotchannelregistration
ReferencingAttribute	msdyn_communicationprovidersettingid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_occommunicationprovidersetting_msdyn_ocbotchannelregistration_communicationprovider
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_occommunicationprovidersettingentry Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - CommunicationBase Solution

Messages

Message	Web API Operation	SDK Assem
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettingentries(*msdyn_occommunicationprovidersettingentryid*) Update `ownerid` property.	AssignRequ
Create	POST [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettingentries See Create	CreateRequ Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettingentries(*msdyn_occommunicationprovidersettingentryid*) See Delete	DeleteRequ Delete
GrantAccess	GrantAccess Action	GrantAcces
IsValidStateTransition	IsValidStateTransition Function	IsValidState
ModifyAccess	ModifyAccess Action	ModifyAcce
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettingentries(*msdyn_occommunicationprovidersettingentryid*) See Retrieve	RetrieveRe Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettingentries See Query Data	RetrieveMu RetrieveMu
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePri
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSha
RevokeAccess	RevokeAccess Action	RevokeAcc
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettingentries(*msdyn_occommunicationprovidersettingentryid*) Update `statecode` and `statuscode` properties.	SetStateRe
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_occommunicationprovidersettingentries(*msdyn_occommunicationprovidersettingentryid*) See Update	UpdateReq Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_occommunicationprovidersettingentries
DisplayCollectionName	Communication Provider Setting Entries
DisplayName	Communication Provider Setting Entry
EntitySetName	msdyn_occommunicationprovidersettingentries
IsBPFEntity	False
LogicalCollectionName	msdyn_occommunicationprovidersettingentries
LogicalName	msdyn_occommunicationprovidersettingentry
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_occommunicationprovidersettingentryid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_occommunicationprovidersettingentry

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_CommunicationProviderSettingEntId
- msdyn_Key
- msdyn_name
- msdyn_occommunicationprovidersettingentryId
- msdyn_Value
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_CommunicationProviderSettingEntId

Property	Value
Description	Unique identifier for Communication Provider Setting associated with Communication Provider Setting Entry.
DisplayName	Communication Provider Setting Entry
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_communicationprovidersettingentid
RequiredLevel	None
Targets	msdyn_occommunicationprovidersetting
Type	Lookup

msdyn_Key

Property	Value
Description	Storing entry key
DisplayName	Key
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_key
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_occommunicationprovidersettingentryId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Communication Provider Setting Entry
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_occommunicationprovidersettingentryid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Value

Property	Value
Description	Storing entry value

Property	Value
DisplayName	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_value
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Communication Provider Setting Entry
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Communication Provider Setting Entry
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_CommunicationProviderSettingEntIdName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser

- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_CommunicationProviderSettingEntIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_communicationprovidersettingentidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_occustommessagingchannel Entity Reference

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Channels asscoiated to Custom messaging account

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_occustommessagingchannels(*msdyn_occustommessagingchannelid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_occustommessagingchannels See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_occustommessagingchannels(*msdyn_occustommessagingchannelid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_occustommessagingchannels(*msdyn_occustommessagingchannelid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_occustommessagingchannels See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_occustommessagingchannels(*msdyn_occustommessagingchannelid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_occustommessagingchannels(*msdyn_occustommessagingchannelid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_occustommessagingchannels
DisplayCollectionName	Custom messaging channels
DisplayName	Custom messaging channel
EntitySetName	msdyn_occustommessagingchannels
IsBPFEntity	False
LogicalCollectionName	msdyn_occustommessagingchannels
LogicalName	msdyn_occustommessagingchannel

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_occustommessagingchannelid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_occustommessagingchannel

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_custombotchannelregistration
- msdyn_enablefileattachmentsforagents
- msdyn_enablefileattachmentsforcustomers
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_occustomchannelid
- msdyn_occustommessagingchannelId
- msdyn_ocwidgetlanguage
- msdyn_PostConversationSurvey
- msdyn_PostConversationSurveyEnable
- msdyn_PostConversationSurveyMessageText
- msdyn_PostConversationSurveyMode
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_custombotchannelregistration

Property	Value
Description	Unique identifier for Custom channel associated with custom messaging account.
DisplayName	Custom messaging account

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_custombotchannelregistration
RequiredLevel	ApplicationRequired
Targets	msdyn_ocbotchannelregistration
Type	Lookup

msdyn_enablefileattachmentsforagents

Property	Value
Description	Enable file attachments for agents
DisplayName	Enable file attachments for agents
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforagents
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforagents Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablefileattachmentsforcustomers

Property	Value
Description	Enable file attachments for customers
DisplayName	Enable file attachments for customers
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforcustomers
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforcustomers Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_liveworkstreamid

Property	Value
Description	Unique identifier for Channel associated with the Work Stream.
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The custom messaging channel name.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_occustomchannelid

Property	Value
Description	Channel ID
DisplayName	Channel ID
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_occustomchannelid
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_occustomchannelid Options

Value	Label
192350000	Direct Line
192350001	Kik
192350002	Telegram

msdyn_occustommessagingchannelId

Property	Value

Property	Value
Description	Unique identifier for entity instances
DisplayName	Custom Messaging Channel
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_occustommessagingchannelid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocwidgetlanguage

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	The language setting for the custom messaging channel
DisplayName	Custom messaging channel language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguage
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_PostConversationSurvey

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Lookup to forms pro survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_PostConversationSurveyEnable

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	To enable or disable post conversation survey
DisplayName	Enable
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyenable
RequiredLevel	None
Type	Boolean

msdyn_PostConversationSurveyEnable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyMessageText

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymessagetext
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyMode

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Mode of the survey to be sent
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyMode Options

Value	Label
192350000	Insert survey in conversation

Value	Label
192350001	Send survey link to conversation

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Custom Messaging Channel
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Custom Messaging Channel
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None

Property	Value
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_custombotchannelregistrationName
- msdyn_liveworkstreamidName
- msdyn_ocwidgetlanguageName
- msdyn_PostConversationSurveyName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.

Property	Value
DisplayName	Created on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_custombotchannelregistrationName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_custombotchannelregistrationname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwidgetlanguageName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguagename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyname
MaxLength	450
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_msdyn_ocbotchannelregistration_msdyn_occustommessagingchannel_custombotchannelregistration
- msdyn_msdyn_oclanguage_msdyn_occustommessagingchannel_custommessagingchannellanguage

msdyn_msdyn_ocbotchannelregistration_msdyn_occustommessagingchannel_custombotchanne

Added by: Omnichannel – Base Solution

See msdyn_ocbotchannelregistration Entity msdyn_msdyn_ocbotchannelregistration_msdyn_occustommessagingchannel_custombotchannelregistration One-To-Many relationship.

msdyn_msdyn_oclanguage_msdyn_occustommessagingchannel_custommessagingchannellangu

Added by: Omnichannel - Base Patch Solution

See msdyn_oclanguage Entity msdyn_msdyn_oclanguage_msdyn_occustommessagingchannel_custommessagingchannellanguage One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocexternalcontext entity reference

Article • 04/12/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocexternalcontexts(*msdyn_ocexternalcontextid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocexternalcontexts See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocexternalcontexts(*msdyn_ocexternalcontextid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
msdyn_ExternalContextCommitTranscriptUpload	Microsoft.Dynamics.CRM.msdyn_ExternalContextCommitTranscriptUpload	Type generated by CrmSvcUtil.exe or u OrganizationRequest setting the requir parameters for the message.
msdyn_ExternalContextInitiateTranscriptUpload	Microsoft.Dynamics.CRM.msdyn_ExternalContextInitiateTranscriptUpload	Type generated by CrmSvcUtil.exe or u OrganizationRequest setting the requir parameters for the message.
msdyn_ExternalContextUploadTranscriptBlocks	Microsoft.Dynamics.CRM.msdyn_ExternalContextUploadTranscriptBlocks	Type generated by CrmSvcUtil.exe or u OrganizationRequest setting the requir parameters for the message.
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocexternalcontexts(*msdyn_ocexternalcontextid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocexternalcontexts See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReq
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocexternalcontexts(*msdyn_ocexternalcontextid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocexternalcontexts(*msdyn_ocexternalcontextid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value

Property	Value
CollectionSchemaName	msdyn_ocexternalcontexts
DisplayCollectionName	External contexts
DisplayName	External context
EntitySetName	msdyn_ocexternalcontexts
IsBPFEntity	False
LogicalCollectionName	msdyn_ocexternalcontexts
LogicalName	msdyn_ocexternalcontext
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocexternalcontextid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocexternalcontext

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_authenticationcorrelation
- msdyn_isauthenticated
- msdyn_name
- msdyn_ocexternalcontextId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_authenticationcorrelation

Property	Value

Property	Value
Description	Corelating data identifying the customer.
DisplayName	Authentication Correlation
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_authenticationcorrelation
MaxLength	100
RequiredLevel	None
Type	String

msdyn_isauthenticated

Property	Value
Description	Identifies whether the customer is authenticated or not.
DisplayName	Authenticated
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isauthenticated
RequiredLevel	None
Type	Boolean

msdyn_isauthenticated Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocexternalcontextId

Property	Value
Description	Unique identifier for entity instances
DisplayName	External Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocexternalcontextid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the External Context
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the External Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_transcript_Name
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam

- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_transcript_Name

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_transcript_name
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number

Property	Value
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocfbapplication Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Facebook applications for Omnichannel integration

Added by: Omnichannel – Facebook Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocfbapplications(*msdyn_ocfbapplicationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocfbapplications See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocfbapplications(*msdyn_ocfbapplicationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocfbapplications(*msdyn_ocfbapplicationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocfbapplications See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocfbapplications(*msdyn_ocfbapplicationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocfbapplications(*msdyn_ocfbapplicationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocfbapplications
DisplayCollectionName	Facebook Applications
DisplayName	Facebook Application
EntitySetName	msdyn_ocfbapplications

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_ocfbapplications
LogicalName	msdyn_ocfbapplication
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocfbapplicationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocfbapplication

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_fbapplicationid
- msdyn_fbapplicationsecret
- msdyn_fbcallbackuri
- msdyn_fbverifytoken
- msdyn_name
- msdyn_ocfbapplicationId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_fbapplicationid

Property	Value

Property	Value
Description	Application Id of Facebook application
DisplayName	Application Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fbapplicationid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_fbapplicationsecret

Property	Value
Description	Application secret of the Facebook application
DisplayName	Application Secret
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fbapplicationsecret
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_fbcallbackuri

Property	Value
Description	Callback Uri to be configured on the Facebook application
DisplayName	Callback Uri
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fbcallbackuri
MaxLength	100
RequiredLevel	None
Type	String

msdyn_fbverifytoken

Property	Value
Description	Verify token to be configured on the Facebook application
DisplayName	Verify Token
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fbverifytoken
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocfbapplicationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Facebook Application
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocfbapplicationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Facebook Application

Property	Value
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Facebook Application
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_ocfbapplication_createdby
- lk_msdyn_ocfbapplication_createdonbehalfby
- lk_msdyn_ocfbapplication_modifiedby
- lk_msdyn_ocfbapplication_modifiedonbehalfby
- user_msdyn_ocfbapplication

lk_msdyn_ocfbapplication_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_ocfbapplication_createdby One-To-Many relationship.

lk_msdyn_ocfbapplication_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_ocfbapplication_createdonbehalfby One-To-Many relationship.

lk_msdyn_ocfbapplication_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_ocfbapplication_modifiedby One-To-Many relationship.

lk_msdyn_ocfbapplication_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_ocfbapplication_modifiedonbehalfby One-To-Many relationship.

user_msdyn_ocfbapplication

Added by: System Solution Solution

See systemuser Entity user_msdyn_ocfbapplication One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocfbpage Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Facebook pages configured for Omnichannel integration

Added by: Omnichannel – Facebook Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_questionsequences See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_questionsequences See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocfbpages
DisplayCollectionName	Facebook Pages
DisplayName	Facebook Page
EntitySetName	msdyn_ocfbpages
IsBPFEntity	False
LogicalCollectionName	msdyn_ocfbpages

Property	Value
LogicalName	msdyn_ocfbpage
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocfbpageid
PrimaryNameAttribute	msdyn_fbpagename
SchemaName	msdyn_ocfbpage

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_enablefileattachmentsforagents
- msdyn_enablefileattachmentsforcustomers
- msdyn_enablehumanagenttag
- msdyn_fbpageaccesstoken
- msdyn_fbpageid
- msdyn_fbpagename
- msdyn_liveworkstreamid
- msdyn_ocfbapplicationid
- msdyn_ocfbpageId
- msdyn_ocwidgetlanguage
- msdyn_PostConversationSurvey
- msdyn_PostConversationSurveyEnable
- msdyn_PostConversationSurveyMessageText
- msdyn_PostConversationSurveyMode
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_enablefileattachmentsforagents

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	Enable file attachments for agents
DisplayName	Enable file attachments for agents
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforagents
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforagents Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablefileattachmentsforcustomers

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	Enable file attachments for customers
DisplayName	Enable file attachments for customers
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforcustomers
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforcustomers Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablehumanagenttag

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	Turn on your Facebook human agent message tag

Property	Value
DisplayName	Turn on your Facebook human agent message tag
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablehumanagenttag
RequiredLevel	None
Type	Boolean

msdyn_enablehumanagenttag Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_fbpageaccesstoken

Property	Value
Description	Access token for the Facebook page
DisplayName	Page Access Token
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fbpageaccesstoken
MaxLength	500
RequiredLevel	ApplicationRequired
Type	String

msdyn_fbpageid

Property	Value
Description	Page id of the Facebook page
DisplayName	Page Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fbpageid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_fbpagename

Property	Value
Description	The name of the Facebook page
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fbpagename
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_liveworkstreamid

Property	Value
Description	Unique identifier for Work Stream associated with Facebook page
DisplayName	Work Stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_ocfbapplicationid

Property	Value
Description	Related Facebook application
DisplayName	Facebook Application
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocfbapplicationid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocfbapplication
Type	Lookup

msdyn_ocfbpageId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Facebook Page

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocfbpageid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocwidgetlanguage

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	The language setting for the Facebook page
DisplayName	Facebook page language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguage
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_PostConversationSurvey

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	Lookup to forms pro survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_PostConversationSurveyEnable

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	To enable or disable post conversation survey
DisplayName	Enable
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_postconversationsurveyenable
RequiredLevel	None
Type	Boolean

msdyn_PostConversationSurveyEnable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyMessageText

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymessagetext
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyMode

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	Mode of the survey to be sent
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyMode Options

Value	Label
192350000	Insert survey in conversation

Value	Label
192350001	Send survey link to conversation

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Facebook Page
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Facebook Page
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber

Property	Value
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- msdyn_ocfbapplicationidName
- msdyn_ocwidgetlanguageName
- msdyn_PostConversationSurveyName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocfbapplicationidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocfbapplicationidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwidgetlanguageName

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguagename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyName

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyname
MaxLength	450
RequiredLevel	None

Property	Value
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit

Property	Value
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808

Property	Value
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_liveworkstream_msdyn_ocfbpage

Added by: Omnichannel – Base Solution

See msdyn_liveworkstream Entity msdyn_msdyn_liveworkstream_msdyn_ocfbpage One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocgooglebusinessmessagesagentaccount Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Google's Business Messages agent account

Added by: Omnichannel - SocialChannels Patch Solution

Messages

Message	Web API Operation	SDK A
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagesagentaccounts(*msdyn_ocgooglebusinessmessagesagentaccountid*) Update `ownerid` property.	Assign
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagesagentaccounts See Create	Create Create
CreateMultiple		Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagesagentaccounts(*msdyn_ocgooglebusinessmessagesagentaccountid*) See Delete	Delete Delete
GrantAccess	GrantAccess Action	GrantA
IsValidStateTransition	IsValidStateTransition Function	IsValid
ModifyAccess	ModifyAccess Action	Modify
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagesagentaccounts(*msdyn_ocgooglebusinessmessagesagentaccountid*) See Retrieve	Retriev Retriev
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagesagentaccounts See Query Data	Retriev Retriev
RetrievePrincipalAccess	RetrievePrincipalAccess Function	Retriev
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	Retriev
RevokeAccess	RevokeAccess Action	Revoke
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagesagentaccounts(*msdyn_ocgooglebusinessmessagesagentaccountid*) Update `statecode` and `statuscode` properties.	SetSta
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagesagentaccounts(*msdyn_ocgooglebusinessmessagesagentaccountid*) See Update	Updat Updat
UpdateMultiple		Updat

Properties

Property	Value
CollectionSchemaName	msdyn_ocgooglebusinessmessagesagentaccounts
DisplayCollectionName	Google's Business Messages agent accounts
DisplayName	Google's Business Messages agent account
EntitySetName	msdyn_ocgooglebusinessmessagesagentaccounts

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_ocgooglebusinessmessagesagentaccounts
LogicalName	msdyn_ocgooglebusinessmessagesagentaccount
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocgooglebusinessmessagesagentaccountid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocgooglebusinessmessagesagentaccount

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_agentaccountclienttoken
- msdyn_agentid
- msdyn_brandid
- msdyn_enableagentoverride
- msdyn_enablefileattachmentsforagents
- msdyn_enablefileattachmentsforcustomers
- msdyn_googlebusinessmessagescallbackurl
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_ocgbmpartneraccount
- msdyn_ocgooglebusinessmessagesagentaccountId
- msdyn_ocwidgetlanguage
- msdyn_PostConversationSurvey
- msdyn_PostConversationSurveyBotSurvey
- msdyn_PostConversationSurveyBotSurveyMessageText
- msdyn_PostConversationSurveyBotSurveyMode
- msdyn_PostConversationSurveyEnable
- msdyn_PostConversationSurveyMessageText
- msdyn_PostConversationSurveyMode
- msdyn_PostConversationSurveySeparateBotSurvey
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647

Property	Value
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_agentaccountclienttoken

Property	Value
Description	Agent account client token of the Google's Business Messages agent account.
DisplayName	Agent account client token
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentaccountclienttoken
MaxLength	500
RequiredLevel	ApplicationRequired
Type	String

msdyn_agentid

Property	Value
Description	Agent ID of the Google's Business Messages agent account.
DisplayName	Agent ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_brandid

Property	Value
Description	Brand ID of the Google's Business Messages agent account.
DisplayName	Brand ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_brandid
MaxLength	100

Property	Value
RequiredLevel	ApplicationRequired
Type	String

msdyn_enableagentoverride

Property	Value
Description	Enable agent override of the Google's Business Messages agent account.
DisplayName	Enable agent override
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enableagentoverride
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enableagentoverride Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablefileattachmentsforagents

Property	Value
Description	Enable file attachments for agent of the Google's Business Messages agent account.
DisplayName	Enable file attachments for agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforagents
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enablefileattachmentsforagents Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablefileattachmentsforcustomers

Property	Value
Description	Enable file attachments for customer of the Google's Business Messages agent account.
DisplayName	Enable file attachments for customer

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforcustomers
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enablefileattachmentsforcustomers Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_googlebusinessmessagescallbackurl

Property	Value
Description	Google's Business Messages callback URL of the Google's Business Messages agent account.
DisplayName	Google's Business Messages callback URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_googlebusinessmessagescallbackurl
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_liveworkstreamid

Property	Value
Description	Live work stream ID of the Google's Business Messages agent account.
DisplayName	Live work stream ID
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.

Property	Value
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocgbmpartneraccount

Property	Value
Description	Google's Business Messages partner account ID of the agent account
DisplayName	Google's Business Messages partner account ID
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocgbmpartneraccount
RequiredLevel	ApplicationRequired
Targets	msdyn_ocgooglebusinessmessagespartneraccount
Type	Lookup

msdyn_ocgooglebusinessmessagesagentaccountId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Google's Business Messages agent account
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocgooglebusinessmessagesagentaccountid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocwidgetlanguage

Property	Value
Description	Widget language of the Google's Business Messages agent account.
DisplayName	Widget language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguage
RequiredLevel	ApplicationRequired

Property	Value
Targets	msdyn_oclanguage
Type	Lookup

msdyn_PostConversationSurvey

Property	Value
Description	Post conversation survey of the Google's Business Messages agent account.
DisplayName	Post conversation survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_PostConversationSurveyBotSurvey

Property	Value
Description	Enable or disable bot survey
DisplayName	Bot Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveybotsurvey
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_PostConversationSurveyBotSurvey Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyBotSurveyMessageText

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveybotsurveymessagetext

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyBotSurveyMode

Property	Value
Description	Mode of the survey to be sent
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveybotsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyBotSurveyMode Choices/Options

Value	Label
192350000	Insert survey in conversation
192350001	Send survey link to conversation

msdyn_PostConversationSurveyEnable

Property	Value
Description	Post conversation survey enable of the Google's Business Messages agent account.
DisplayName	Post conversation survey enable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyenable
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_PostConversationSurveyEnable Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyMessageText

Property	Value
Description	Post conversation survey message text of the Google's Business Messages agent account.
DisplayName	Post conversation survey message text

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymessagetext
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyMode

Property	Value
Description	Post conversation survey mode of the Google's Business Messages agent account.
DisplayName	Post conversation survey mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyMode Choices/Options

Value	Label
192350000	Insert survey in conversation
192350001	Send survey link to conversation

msdyn_PostConversationSurveySeparateBotSurvey

Property	Value
Description	Lookup to Dynamics 365 Customer Voice survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyseparatebotsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On

Property	Value
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Google's Business Messages agent account
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode

Property	Value
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Google's Business Messages agent account
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.

Property	Value
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- msdyn_ocgbmpartneraccountName
- msdyn_ocwidgetlanguageName
- msdyn_PostConversationSurveyName
- msdyn_PostConversationSurveySeparateBotSurveyName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocgbmpartneraccountName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	msdyn_ocgbmpartneraccountname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwidgetlanguageName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguagename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyname
MaxLength	450
RequiredLevel	None
Type	String

msdyn_PostConversationSurveySeparateBotSurveyName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyseparatebotsurveyname

Property	Value
MaxLength	450
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocgooglebusinessmessagespartneraccount table/entity reference

Article • 02/20/2023

> **Note**
>
> Unsure about table vs. entity? See **Developers: Understand terminology in Microsoft Dataverse**. Google's Business Messages partner account

Added by: Omnichannel - SocialChannels Patch Solution

Messages

Message	Web API Operation	SD
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagespartneraccounts(*msdyn_ocgooglebusinessmessagespartneraccountid*) Update `ownerid` property.	Ass
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagespartneraccounts See Create	Cre Cre
CreateMultiple		Cre
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagespartneraccounts(*msdyn_ocgooglebusinessmessagespartneraccountid*) See Delete	De De
GrantAccess	GrantAccess Action	Gra
IsValidStateTransition	IsValidStateTransition Function	IsV
ModifyAccess	ModifyAccess Action	Mo
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagespartneraccounts(*msdyn_ocgooglebusinessmessagespartneraccountid*) See Retrieve	Ret Ret
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagespartneraccounts See Query Data	Ret Ret
RetrievePrincipalAccess	RetrievePrincipalAccess Function	Ret
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	Ret
RevokeAccess	RevokeAccess Action	Rev
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagespartneraccounts(*msdyn_ocgooglebusinessmessagespartneraccountid*) Update `statecode` and `statuscode` properties.	Set
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocgooglebusinessmessagespartneraccounts(*msdyn_ocgooglebusinessmessagespartneraccountid*) See Update	Up Up
UpdateMultiple		Up

Properties

Property	Value
CollectionSchemaName	msdyn_ocgooglebusinessmessagespartneraccounts
DisplayCollectionName	Google's Business Messages partner accounts
DisplayName	Google's Business Messages partner account
EntitySetName	msdyn_ocgooglebusinessmessagespartneraccounts

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_ocgooglebusinessmessagespartneraccounts
LogicalName	msdyn_ocgooglebusinessmessagespartneraccount
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocgooglebusinessmessagespartneraccountid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocgooglebusinessmessagespartneraccount

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_base64credentialfilestring
- msdyn_base64credentialfilestringcontd
- msdyn_credentialfilename
- msdyn_googlebusinessmessagescallbackurl
- msdyn_name
- msdyn_ocgooglebusinessmessagespartneraccountId
- msdyn_partneraccountclienttoken
- msdyn_partneraccountid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_base64credentialfilestring

Property	Value
Description	Base 64 credential file string of the Google's Business Messages partner account.
DisplayName	Base 64 credential file string

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_base64credentialfilestring
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_base64credentialfilestringcontd

Property	Value
Description	Base 64 credential file string of the Google's Business Messages partner account. - Continued
DisplayName	Base 64 credential file string - Continued
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_base64credentialfilestringcontd
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_credentialfilename

Property	Value
Description	Credential file name of the Google's Business Messages partner account.
DisplayName	Credential file name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_credentialfilename
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_googlebusinessmessagescallbackurl

Property	Value
Description	Google's Business Messages callback URL of the Google's Business Messages partner account.
DisplayName	Google's Business Messages callback URL
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_googlebusinessmessagescallbackurl
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocgooglebusinessmessagespartneraccountId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Google's Business Messages partner account
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocgooglebusinessmessagespartneraccountid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_partneraccountclienttoken

Property	Value
Description	Partner account client token of the Google's Business Messages partner account.
DisplayName	Partner account client token
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_partneraccountclienttoken
MaxLength	500
RequiredLevel	ApplicationRequired
Type	String

msdyn_partneraccountid

Property	Value
Description	Partner account ID of the Google's Business Messages partner account.
DisplayName	Partner account ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_partneraccountid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired

Property	Value
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Google's Business Messages partner account
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Google's Business Messages partner account
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn

- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_ocgbmpartneraccount_msdyn_ocbotchannelregistration_ocgbmpartneraccount

Same as msdyn_ocbotchannelregistration table msdyn_msdyn_ocgbmpartneraccount_msdyn_ocbotchannelregistration_ocgbmpartneraccount Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocbotchannelregistration
ReferencingAttribute	msdyn_ocgbmpartneraccount
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_ocgbmpartneraccount_msdyn_ocbotchannelregistration_ocgbmpartneraccount
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

About the Entity Reference
Web API Reference

msdyn_oclanguage Entity Reference

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_oclanguages(*msdyn_oclanguageid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_oclanguages See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_oclanguages(*msdyn_oclanguageid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_oclanguages(*msdyn_oclanguageid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_oclanguages See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_oclanguages(*msdyn_oclanguageid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_oclanguages(*msdyn_oclanguageid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_oclanguages
DisplayCollectionName	Languages
DisplayName	Language
EntitySetName	msdyn_oclanguages
IsBPFEntity	False
LogicalCollectionName	msdyn_oclanguages
LogicalName	msdyn_oclanguage
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_oclanguageid

Property	Value
PrimaryNameAttribute	msdyn_languagename
SchemaName	msdyn_oclanguage

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_languagename
- msdyn_localeid
- msdyn_oclanguageId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_languagename

Property	Value
Description	The language name of the record.
DisplayName	Language Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_languagename
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_localeid

Property	Value
Description	The Locale ID of the language this record represents.
DisplayName	Locale ID
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_localeid
MaxValue	100000
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_oclanguageId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Language
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_oclanguageid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Language
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Language

Property	Value
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_msdyn_oclanguage_msdyn_ocfbpage_facebookpagelanguage
- msdyn_msdyn_oclanguage_msdyn_occustommessagingchannel_custommessagingchannellanguage
- msdyn_msdyn_oclanguage_msdyn_oclinechannelconfig_lineaccountlanguage
- msdyn_msdyn_oclanguage_msdyn_octwitterhandle_twitterhandlelanguage
- msdyn_msdyn_oclanguage_msdyn_ocwechatchannelconfig_wechataccountlanguage

- msdyn_msdyn_oclanguage_msdyn_ocwhatsappchannelnumber_whatsappnumberlanguage
- msdyn_msdyn_oclanguage_msdyn_octeamschannelconfig_teamsaccountlanguage
- msdyn_msdyn_oclanguage_msdyn_ocoutboundconfiguration_defaultlocale
- msdyn_ocoutboundmessage_occustomerlocale

msdyn_msdyn_oclanguage_msdyn_ocfbpage_facebookpagelanguage

Added by: Omnichannel - Facebook Patch Solution

Same as msdyn_ocfbpage entity msdyn_msdyn_oclanguage_msdyn_ocfbpage_facebookpagelanguage Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocfbpage
ReferencingAttribute	msdyn_ocwidgetlanguage
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_oclanguage_msdyn_ocfbpage_facebookpagelanguage
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_oclanguage_msdyn_occustommessagingchannel_custommessagingchannellangu

Added by: Omnichannel - SocialChannels Patch Solution

Same as msdyn_occustommessagingchannel entity
msdyn_msdyn_oclanguage_msdyn_occustommessagingchannel_custommessagingchannellanguage Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_occustommessagingchannel
ReferencingAttribute	msdyn_ocwidgetlanguage
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_oclanguage_msdyn_occustommessagingchannel_custommessagingchannellanguage
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_oclanguage_msdyn_oclinechannelconfig_lineaccountlanguage

Added by: Omnichannel - SocialChannels Patch Solution

Same as msdyn_oclinechannelconfig entity msdyn_msdyn_oclanguage_msdyn_oclinechannelconfig_lineaccountlanguage Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_oclinechannelconfig
ReferencingAttribute	msdyn_ocwidgetlanguage
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_oclanguage_msdyn_oclinechannelconfig_lineaccountlanguage
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_oclanguage_msdyn_octwitterhandle_twitterhandlelanguage

Added by: Omnichannel - SocialChannels Patch Solution

Same as msdyn_octwitterhandle entity msdyn_msdyn_oclanguage_msdyn_octwitterhandle_twitterhandlelanguage Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_octwitterhandle
ReferencingAttribute	msdyn_ocwidgetlanguage
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_oclanguage_msdyn_octwitterhandle_twitterhandlelanguage
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_oclanguage_msdyn_ocwechatchannelconfig_wechataccountlanguage

Added by: Omnichannel - SocialChannels Patch Solution

Same as msdyn_ocwechatchannelconfig entity msdyn_msdyn_oclanguage_msdyn_ocwechatchannelconfig_wechataccountlanguage Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocwechatchannelconfig
ReferencingAttribute	msdyn_ocwidgetlanguage
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_oclanguage_msdyn_ocwechatchannelconfig_wechataccountlanguage

Property	Value
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_oclanguage_msdyn_ocwhatsappchannelnumber_whatsappnumberlanguage

Added by: Omnichannel - SocialChannels Patch Solution

Same as msdyn_ocwhatsappchannelnumber entity msdyn_msdyn_oclanguage_msdyn_ocwhatsappchannelnumber_whatsappnumberlanguage Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocwhatsappchannelnumber
ReferencingAttribute	msdyn_ocwidgetlanguage
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_oclanguage_msdyn_ocwhatsappchannelnumber_whatsappnumberlanguage
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_oclanguage_msdyn_octeamschannelconfig_teamsaccountlanguage

Added by: Omnichannel - Teams Patch Solution

Same as msdyn_octeamschannelconfig entity msdyn_msdyn_oclanguage_msdyn_octeamschannelconfig_teamsaccountlanguage Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_octeamschannelconfig
ReferencingAttribute	msdyn_ocwidgetlanguage
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_oclanguage_msdyn_octeamschannelconfig_teamsaccountlanguage
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_oclanguage_msdyn_ocoutboundconfiguration_defaultlocale

Added by: Omnichannel – Outbound Solution

Same as msdyn_ocoutboundconfiguration entity msdyn_msdyn_oclanguage_msdyn_ocoutboundconfiguration_defaultlocale Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocoutboundconfiguration
ReferencingAttribute	msdyn_defaultlocale
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_oclanguage_msdyn_ocoutboundconfiguration_defaultlocale
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_ocoutboundmessage_occustomerlocale

Added by: Omnichannel – Outbound Solution

Same as msdyn_ocoutboundmessage entity msdyn_ocoutboundmessage_occustomerlocale Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocoutboundmessage
ReferencingAttribute	msdyn_occustomerlocale
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_ocoutboundmessage_occustomerlocale
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_oclinechannelconfig Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

LINE accounts for Omnichannel integration

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_oclinechannelconfigs(*msdyn_oclinechannelconfigid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_oclinechannelconfigs See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_oclinechannelconfigs(*msdyn_oclinechannelconfigid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_oclinechannelconfigs(*msdyn_oclinechannelconfigid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_oclinechannelconfigs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_oclinechannelconfigs(*msdyn_oclinechannelconfigid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_oclinechannelconfigs(*msdyn_oclinechannelconfigid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_oclinechannelconfigs
DisplayCollectionName	LINE accounts
DisplayName	LINE account
EntitySetName	msdyn_oclinechannelconfigs
IsBPFEntity	False
LogicalCollectionName	msdyn_oclinechannelconfigs

Property	Value
LogicalName	msdyn_oclinechannelconfig
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_oclinechannelconfigid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_oclinechannelconfig

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_channelaccesstoken
- msdyn_channelid
- msdyn_channelsecret
- msdyn_enablefileattachmentsforagents
- msdyn_enablefileattachmentsforcustomers
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_oclinechannelconfigId
- msdyn_ocwidgetlanguage
- msdyn_PostConversationSurvey
- msdyn_PostConversationSurveyEnable
- msdyn_PostConversationSurveyMessageText
- msdyn_PostConversationSurveyMode
- msdyn_webhookurl
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_channelaccesstoken

Property	Value
Description	Channel Access Token is of Line Channel
DisplayName	Channel Access Token
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channelaccesstoken
MaxLength	1000
RequiredLevel	ApplicationRequired
Type	String

msdyn_channelid

Property	Value
Description	Channel ID of Line Channel
DisplayName	Channel ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channelid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_channelsecret

Property	Value
Description	Channel secret of the Line Channel
DisplayName	Channel Secret
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channelsecret
MaxLength	225
RequiredLevel	ApplicationRequired
Type	String

msdyn_enablefileattachmentsforagents

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Enable file attachments for agents
DisplayName	Enable file attachments for agents
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforagents
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforagents Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablefileattachmentsforcustomers

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Enable file attachments for customers
DisplayName	Enable file attachments for customers
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforcustomers
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforcustomers Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_liveworkstreamid

Property	Value
Description	Work Stream
DisplayName	Work Stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired

Property	Value
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_oclinechannelconfigId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Line Channel identifies Line Channel
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_oclinechannelconfigid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocwidgetlanguage

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	The language setting for the LINE account
DisplayName	LINE account language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguage
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_PostConversationSurvey

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Lookup to Forms Pro survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_PostConversationSurveyEnable

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	To enable or disable post conversation survey
DisplayName	Enable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyenable
RequiredLevel	None
Type	Boolean

msdyn_PostConversationSurveyEnable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyMessageText

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymessagetext

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyMode

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Mode of the survey to be sent
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyMode Options

Value	Label
192350000	Insert survey in conversation
192350001	Send survey link to conversation

msdyn_webhookurl

Property	Value
Description	Webhook URL of Line Channel
DisplayName	Webhook URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_webhookurl
MaxLength	500
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Line Channel
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired

Property	Value
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Line Channel
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code

Property	Value
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- msdyn_ocwidgetlanguageName
- msdyn_PostConversationSurveyName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwidgetlanguageName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguagename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyname
MaxLength	450
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_oclinechannelconfig_msdyn_ocprovisioningstate_oclinechannelconfigid
- msdyn_oclinechannelconfig_msdyn_ocbotchannelregistration_msdyn_oclinechannelconfigid

msdyn_oclinechannelconfig_msdyn_ocprovisioningstate_oclinechannelconfigid

Same as msdyn_ocprovisioningstate, msdyn_oclinechannelconfig_msdyn_ocprovisioningstate_oclinechannelconfigid entity, Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocprovisioningstate
ReferencingAttribute	msdyn_oclinechannelconfigid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_oclinechannelconfig_msdyn_ocprovisioningstate_oclinechannelconfigid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_oclinechannelconfig_msdyn_ocbotchannelregistration_msdyn_oclinechannelconfigid

Same as msdyn_ocbotchannelregistration entity, msdyn_oclinechannelconfig_msdyn_ocbotchannelregistration_msdyn_oclinechannelconfigid, Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocbotchannelregistration
ReferencingAttribute	msdyn_oclinechannelconfigid
IsHierarchical	False
IsCustomizable	True

Property	Value
ReferencedEntityNavigationPropertyName	msdyn_oclinechannelconfig_msdyn_ocbotchannelregistration_msdyn_oclinechannelconfigid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_oclanguage_msdyn_oclinechannelconfig_lineaccountlanguage

Added by: Omnichannel - Base Patch Solution

See msdyn_oclanguage Entity msdyn_msdyn_oclanguage_msdyn_oclinechannelconfig_lineaccountlanguage One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocliveworkitem entity reference

Article • 05/23/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Tracks the interaction between the agents and customer

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitems(*activityid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocliveworkitems See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocliveworkitems(*activityid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
msdyn_GetCaseSuggestionsForConversation		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocliveworkitems(*activityid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocliveworkitems See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitems(*activityid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitems(*activityid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_ocliveworkitems
DisplayCollectionName	Conversations
DisplayName	Conversation
EntitySetName	msdyn_ocliveworkitems

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_ocliveworkitems
LogicalName	msdyn_ocliveworkitem
OwnershipType	UserOwned
PrimaryIdAttribute	activityid
PrimaryNameAttribute	subject
SchemaName	msdyn_ocliveworkitem

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ActivityAdditionalParams
- ActivityId
- ActualDurationMinutes
- ActualEnd
- ActualStart
- BCC
- CC
- Community
- Customers
- DeliveryPriorityCode
- Description
- ExchangeItemId
- ExchangeWebLink
- From
- ImportSequenceNumber
- IsBilled
- IsMapiPrivate
- IsWorkflowCreated
- LastOnHoldTime
- LeftVoiceMail
- msdyn_activeagentassignedon
- msdyn_activeagentid
- msdyn_activesessionparticipantid
- msdyn_cdsqueueid
- msdyn_channel
- msdyn_channelproviderName
- msdyn_closedon
- msdyn_ConversationSummaryField
- msdyn_createdon
- msdyn_customer
- msdyn_customerIdType
- msdyn_customerlanguageid
- msdyn_customerlocale
- msdyn_customersentimentlabel
- msdyn_dailytopicid
- msdyn_escalationcount
- msdyn_initiatedon
- msdyn_isoutbound
- msdyn_IssueId
- msdyn_lastsessionid
- msdyn_liveworkstreamid
- msdyn_liveworkstreamnotificationdata
- msdyn_modifiedon
- msdyn_ocliveworkitemid

- msdyn_queueid
- msdyn_queueitemid
- msdyn_routableobjectid
- msdyn_routableobjectidIdType
- msdyn_socialprofileid
- msdyn_startedon
- msdyn_statusupdatedon
- msdyn_thirdpartyconversation
- msdyn_TimelineControlField
- msdyn_title
- msdyn_TranscriptControl
- msdyn_transfercount
- msdyn_workstreamworkdistributionmode
- msdyn_wrapupinitiatedon
- OptionalAttendees
- Organizer
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- Partners
- PriorityCode
- ProcessId
- RegardingObjectId
- RegardingObjectIdName
- RegardingObjectIdYomiName
- RegardingObjectTypeCode
- RequiredAttendees
- Resources
- ScheduledDurationMinutes
- ScheduledEnd
- ScheduledStart
- ServiceId
- SLAId
- SortDate
- StageId
- StateCode
- StatusCode
- Subject
- TimeZoneRuleVersionNumber
- To
- TransactionCurrencyId
- TraversedPath
- UTCConversionTimeZoneCode

ActivityAdditionalParams

Property	Value
Description	Additional information provided by the external application as JSON. For internal use only.
DisplayName	Activity Additional Parameters
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	activityadditionalparams
MaxLength	8192
RequiredLevel	None

Property	Value
Type	Memo

ActivityId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the activity.
DisplayName	Activity
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	activityid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ActualDurationMinutes

Property	Value
Description	Actual duration of the activity in minutes.
DisplayName	Actual Duration
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	actualdurationminutes
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

ActualEnd

Property	Value
DateTimeBehavior	UserLocal
Description	Actual end time of the activity.
DisplayName	Actual End
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	actualend
RequiredLevel	None
Type	DateTime

ActualStart

Property	Value
DateTimeBehavior	UserLocal
Description	Actual start time of the activity.
DisplayName	Actual Start
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	actualstart
RequiredLevel	None
Type	DateTime

BCC

Added by: Active Solution Solution

Property	Value
Description	Blind Carbon-copy (bcc) recipients of the activity.
DisplayName	BCC
IsValidForForm	True
IsValidForRead	True
LogicalName	bcc
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

CC

Added by: Active Solution Solution

Property	Value
Description	Carbon-copy (cc) recipients of the activity.
DisplayName	CC
IsValidForForm	True
IsValidForRead	True
LogicalName	cc
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

Community

Property	Value
Description	Shows how contact about the social activity originated, such as from Twitter or Facebook. This field is read-only.
DisplayName	Social Channel
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	community
RequiredLevel	None
Type	Picklist

Community Choices/Options

Value	Label
0	Other
1	Facebook
2	Twitter
3	Line
4	Wechat
5	Cortana
6	Direct Line
7	Microsoft Teams
8	Direct Line Speech
9	Email
10	GroupMe
11	Kik
12	Telegram
13	Skype
14	Slack
15	WhatsApp

Customers

Added by: Active Solution Solution

Property	Value
Description	Customer with which the activity is associated.
DisplayName	Customers
IsValidForForm	True
IsValidForRead	True
LogicalName	customers
RequiredLevel	None
Targets	account,contact
Type	PartyList

DeliveryPriorityCode

Property	Value
Description	Priority of delivery of the activity to the email server.
DisplayName	Delivery Priority

Property	Value
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	deliveryprioritycode
RequiredLevel	None
Type	Picklist

DeliveryPriorityCode Choices/Options

Value	Label
0	Low
1	Normal
2	High

Description

Property	Value
Description	Description of the activity.
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	description
MaxLength	2000
RequiredLevel	None
Type	Memo

ExchangeItemId

Property	Value
Description	The message id of activity which is returned from Exchange Server.
DisplayName	Exchange Item ID
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	exchangeitemid
MaxLength	200
RequiredLevel	None
Type	String

ExchangeWebLink

Property	Value
Description	Shows the web link of Activity of type email.
DisplayName	Exchange WebLink
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	exchangeweblink
MaxLength	1250
RequiredLevel	None
Type	String

From

Added by: Active Solution Solution

Property	Value
Description	Person who the activity is from.
DisplayName	From
IsValidForForm	True
IsValidForRead	True
LogicalName	from
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsBilled

Property	Value
Description	Information regarding whether the activity was billed as part of resolving a case.

Property	Value
DisplayName	Is Billed
IsValidForForm	False
IsValidForRead	True
LogicalName	isbilled
RequiredLevel	None
Type	Boolean

IsBilled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsMapiPrivate

Property	Value
Description	For internal use only.
DisplayName	Is Private
IsValidForForm	False
IsValidForRead	True
LogicalName	ismapiprivate
RequiredLevel	None
Type	Boolean

IsMapiPrivate Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsWorkflowCreated

Property	Value
Description	Information regarding whether the activity was created from a workflow rule.
DisplayName	Is Workflow Created
IsValidForForm	False
IsValidForRead	True
LogicalName	isworkflowcreated
RequiredLevel	None
Type	Boolean

IsWorkflowCreated Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

LastOnHoldTime

Added by: Active Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	Contains the date and time stamp of the last on hold time.
DisplayName	Last On Hold Time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	lastonholdtime
RequiredLevel	None
Type	DateTime

LeftVoiceMail

Property	Value
Description	Left the voice mail
DisplayName	Left Voice Mail
IsValidForForm	True
IsValidForRead	True
LogicalName	leftvoicemail
RequiredLevel	None
Type	Boolean

LeftVoiceMail Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_activeagentassignedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when last agent was assigned to the conversation
DisplayName	Active Agent Assigned On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_activeagentassignedon
RequiredLevel	None
Type	DateTime

msdyn_activeagentid

Property	Value
Description	Indicates the agent currently assigned to the conversation or last assigned agent for a closed conversation. It is populated as empty or null if the customer(C2) ends or is disconnected before the agent accepts conversation.
DisplayName	Active Agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_activeagentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_activesessionparticipantid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	Active session participant
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_activesessionparticipantid
RequiredLevel	None
Targets	msdyn_sessionparticipant
Type	Lookup

msdyn_cdsqueueid

Property	Value
Description	Unique identifier for Queue associated with Conversation.
DisplayName	Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_cdsqueueid
RequiredLevel	None
Targets	queue
Type	Lookup

msdyn_channel

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	The channel(s) in the conversation.
DisplayName	Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channel
RequiredLevel	None
Type	MultiSelectPicklist

msdyn_channel Choices/Options

Value	Label
19241000	Microsoft Teams
192300000	WhatsApp
192310000	LINE
192320000	WeChat
192330000	Facebook
192340000	SMS
192350000	Entity Records
192350001	Twitter
192350002	Custom
192360000	Live chat
192370000	Voice
192380000	Video
192390000	Co-browse
192400000	Screen sharing
192440000	Voice call

msdyn_channelproviderName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Channel Provider Name.
DisplayName	Channel Provider Name
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channelproviderName
MaxLength	200

Property	Value
RequiredLevel	None
Type	Memo

msdyn_closedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when conversation was closed
DisplayName	Closed On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_closedon
RequiredLevel	None
Type	DateTime

msdyn_ConversationSummaryField

Property	Value
Description	Field to bind conversation summary control
DisplayName	Conversation summary field
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_conversationsummaryfield
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_createdon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_createdon
RequiredLevel	None
Type	DateTime

msdyn_customer

Property	Value
Description	Customer with which the activity is associated.
DisplayName	Customer
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customer
RequiredLevel	None
Targets	account,contact
Type	Customer

msdyn_customerIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customeridtype
RequiredLevel	None
Type	EntityName

msdyn_customerlanguageid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	The language of the customer in this conversation.
DisplayName	Customer Language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerlanguageid
RequiredLevel	None
Targets	msdyn_oclanguage
Type	Lookup

msdyn_customerlocale

Property	Value
Description	The locale of the customer participated in this conversation.
DisplayName	Customer Locale
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerlocale
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customersentimentlabel

Property	Value
Description	Customer Sentiment Label powered by Sentiment Service
DisplayName	Customer Sentiment
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customersentimentlabel
RequiredLevel	None
Type	Picklist

msdyn_customersentimentlabel Choices/Options

Value	Label
0	N/A
7	Very negative
8	Negative
9	Slightly negative
10	Neutral
11	Slightly positive
12	Positive
13	Very positive

msdyn_dailytopicid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Look up to daily topic entity.
DisplayName	TopicID
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_dailytopicid
RequiredLevel	None
Targets	msdyn_ocsentimentdailytopic
Type	Lookup

msdyn_escalationcount

Property	Value
Description	Number of times conversation was escalated to Supervisor i.e. transferred to Supervisor
DisplayName	Escalation Count
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_escalationcount
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_initiatedon

Property	Value
DateTimeBehavior	UserLocal
Description	Time when conversation was initiated
DisplayName	Initiated On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_initiatedon
RequiredLevel	None
Type	DateTime

msdyn_isoutbound

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Indicates if its an outbound Conversation
DisplayName	Outbound Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isoutbound
RequiredLevel	None
Type	Boolean

msdyn_isoutbound Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_IssueId

Added by: Omnichannel – Base for Dynamics 365 Applications Solution

Property	Value
Description	Unique identifier for Case associated with Conversation.
DisplayName	Issue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_issueid
RequiredLevel	None
Targets	incident
Type	Lookup

msdyn_lastsessionid

Property	Value
Description	Last agent session
DisplayName	Last Session
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_lastsessionid
RequiredLevel	None
Targets	msdyn_ocsession
Type	Lookup

msdyn_liveworkstreamid

Property	Value
Description	Work stream associated to the conversation
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	None
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_liveworkstreamnotificationdata

Property	Value
Description	LiveWorkStream notification data provided as JSON. For internal use only.
DisplayName	LiveWorkStream Notification Data
Format	TextArea

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamnotificationdata
MaxLength	8192
RequiredLevel	None
Type	Memo

msdyn_modifiedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when conversation was last modified
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_modifiedon
RequiredLevel	None
Type	DateTime

msdyn_ocliveworkitemid

Property	Value
Description	Unique Id of conversation
DisplayName	ConversationId
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_queueid

Property	Value
Description	Unique identifier for msdyn_omnichannelqueue associated with Conversation
DisplayName	Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueid

Property	Value
RequiredLevel	None
Targets	msdyn_omnichannelqueue
Type	Lookup

msdyn_queueitemid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Queue item associated with the conversation
DisplayName	Queue item
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueitemid
RequiredLevel	None
Targets	queueitem
Type	Lookup

msdyn_routableobjectid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Unique identifier of the routed record. Records are of those entities enabled for Unified Routing and have at least one Workstream created. For internal use only.
DisplayName	Routed record
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routableobjectid
RequiredLevel	None
Targets	task
Type	Lookup

msdyn_routableobjectidIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_routableobjectididtype
RequiredLevel	None
Type	EntityName

msdyn_socialprofileid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Lookup for the Social Profile Entity Record.
DisplayName	Social Profile
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_socialprofileid
RequiredLevel	None
Targets	socialprofile
Type	Lookup

msdyn_startedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when conversation was started
DisplayName	Started On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_startedon
RequiredLevel	None
Type	DateTime

msdyn_statusupdatedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when conversation status was last modified
DisplayName	Status Updated On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_statusupdatedon
RequiredLevel	None
Type	DateTime

msdyn_thirdpartyconversation

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Third Party Conversation

Property	Value
DisplayName	Third Party Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_thirdpartyconversation
RequiredLevel	None
Type	Boolean

msdyn_thirdpartyconversation Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_TimelineControlField

Property	Value
Description	Field to bind Timelinewall control
DisplayName	Timeline Control Field
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_timelinecontrolfield
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_title

Property	Value
Description	Conversation Title
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_title
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_TranscriptControl

Property	Value
Description	Placeholder for Transcript Control
DisplayName	Chat Transcript
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_transcriptcontrol
MaxLength	100
RequiredLevel	None
Type	String

msdyn_transfercount

Property	Value
Description	Number of times the conversation was transferred
DisplayName	Transfer Count
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_transfercount
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_workstreamworkdistributionmode

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Work distribution mode of the associated work stream
DisplayName	Work distribution mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_workstreamworkdistributionmode
RequiredLevel	None
Type	Picklist

msdyn_workstreamworkdistributionmode Choices/Options

Value	Label
192350000	Push
192350001	Pick

msdyn_wrapupinitiatedon

Added by: Omnichannel - Base Patch Solution

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when conversation end
DisplayName	Wrap-up Status Intiated On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_wrapupinitiatedon
RequiredLevel	None
Type	DateTime

OptionalAttendees

Added by: Active Solution Solution

Property	Value
Description	List of optional attendees for the activity.
DisplayName	Optional Attendees
IsValidForForm	True
IsValidForRead	True
LogicalName	optionalattendees
RequiredLevel	None
Targets	account,contact,entitlement,equipment,knowledgearticle,lead,queue,systemuser,unresolvedaddress
Type	PartyList

Organizer

Added by: Active Solution Solution

Property	Value
Description	Person who organized the activity.
DisplayName	Organizer
IsValidForForm	True
IsValidForRead	True
LogicalName	organizer
RequiredLevel	None
Targets	systemuser
Type	PartyList

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user or team who owns the activity.
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

Partners

Added by: Active Solution Solution

Property	Value
Description	Outsource vendor with which activity is associated.
DisplayName	Outsource Vendors
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	partners
RequiredLevel	None
Targets	account,contact
Type	PartyList

PriorityCode

Property	Value
Description	Priority of the activity.
DisplayName	Priority
IsValidForForm	True
IsValidForRead	True
LogicalName	prioritycode
RequiredLevel	None
Type	Picklist

PriorityCode Choices/Options

Value	Label
0	Low
1	Normal
2	High

ProcessId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the Process.
DisplayName	Process
IsValidForForm	False
IsValidForRead	True
LogicalName	processid
RequiredLevel	None
Type	Uniqueidentifier

RegardingObjectId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the object with which the activity is associated.
DisplayName	Regarding
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	regardingobjectid
RequiredLevel	None
Targets	account,adx_ad,adx_adplacement,adx_invitation,adx_poll,adx_polloption,adx_pollplacement,adx_pollsubmission,adx_publishingstatetransitionrule,adx_
Type	Lookup

RegardingObjectIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjectidname
MaxLength	400
RequiredLevel	None
Type	String

RegardingObjectIdYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjectidyominame
MaxLength	400
RequiredLevel	None
Type	String

RegardingObjectTypeCode

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjecttypecode
RequiredLevel	None
Type	EntityName

RequiredAttendees

Added by: Active Solution Solution

Property	Value
Description	List of required attendees for the activity.
DisplayName	Required Attendees
IsValidForForm	True
IsValidForRead	True
LogicalName	requiredattendees
RequiredLevel	None
Targets	account,contact,entitlement,equipment,knowledgearticle,lead,queue,systemuser,unresolvedaddress
Type	PartyList

Resources

Added by: Active Solution Solution

Property	Value
Description	Users or facility/equipment that are required for the activity.
DisplayName	Resources
IsValidForForm	True
IsValidForRead	True
LogicalName	resources
RequiredLevel	None
Targets	equipment,systemuser
Type	PartyList

ScheduledDurationMinutes

Property	Value
Description	Scheduled duration of the activity, specified in minutes.
DisplayName	Scheduled Duration
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduleddurationminutes
MaxValue	2147483647

Property	Value
MinValue	0
RequiredLevel	None
Type	Integer

ScheduledEnd

Property	Value
DateTimeBehavior	UserLocal
Description	Scheduled end time of the activity.
DisplayName	Due Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledend
RequiredLevel	None
Type	DateTime

ScheduledStart

Property	Value
DateTimeBehavior	UserLocal
Description	Scheduled start time of the activity.
DisplayName	Start Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledstart
RequiredLevel	None
Type	DateTime

ServiceId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of an associated service.
DisplayName	Service
IsValidForForm	False
IsValidForRead	True
LogicalName	serviceid
RequiredLevel	None
Targets	service
Type	Lookup

SLAId

Added by: Active Solution Solution

Property	Value
Description	Choose the service level agreement (SLA) that you want to apply to the case record.
DisplayName	SLA
IsValidForForm	True
IsValidForRead	True
LogicalName	slaid
RequiredLevel	None
Targets	sla
Type	Lookup

SortDate

Property	Value
DateTimeBehavior	UserLocal
Description	Shows the date and time by which the activities are sorted.
DisplayName	Sort Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	sortdate
RequiredLevel	None
Type	DateTime

StageId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the Stage.
DisplayName	Process Stage
IsValidForForm	False
IsValidForRead	True
LogicalName	stageid
RequiredLevel	None
Type	Uniqueidentifier

StateCode

Property	Value
Description	State of the conversation record
DisplayName	State
IsValidForCreate	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Open	1	Open
1	Closed	4	Closed
2	Resolved	6	Resolved
3	Scheduled	7	Scheduled
4	Wrap-up (Deprecated)	5	Wrap-up (Deprecated)

StatusCode

Property	Value
Description	Reason for the status of the activity.
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

StatusCode Choices/Options

Value	Label	State
1	Open	0
2	Active	0
3	Waiting	0
4	Closed	1
5	Wrap-up	0
6	Resolved	2
7	Scheduled	3

Subject

Property	Value
Description	Subject associated with the activity.
DisplayName	Subject
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	subject
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

To

Added by: Active Solution Solution

Property	Value
Description	Person who is the receiver of the activity.
DisplayName	To
IsValidForForm	True
IsValidForRead	True
LogicalName	to
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

TransactionCurrencyId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the currency associated with the activitypointer.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	transactioncurrencyid
RequiredLevel	None
Targets	transactioncurrency
Type	Lookup

TraversedPath

Added by: Active Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Traversed Path
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	traversedpath
MaxLength	1250
RequiredLevel	None
Type	String

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ActivityTypeCode
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName

- DeliveryLastAttemptedOn
- ExchangeRate
- InstanceTypeCode
- IsRegularActivity
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_activeagentidName
- msdyn_activeagentidYomiName
- msdyn_activesessionparticipantidName
- msdyn_cdsqueueidName
- msdyn_customerlanguageidName
- msdyn_customerName
- msdyn_customerYomiName
- msdyn_dailytopicidName
- msdyn_IssueIdName
- msdyn_lastsessionidName
- msdyn_liveworkstreamidName
- msdyn_queueidName
- msdyn_queueitemidName
- msdyn_routableobjectidName
- msdyn_routableobjectidYomiName
- msdyn_socialprofileidName
- OnHoldTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- PostponeActivityProcessingUntil
- SenderMailboxId
- SenderMailboxIdName
- SentOn
- SeriesId
- ServiceIdName
- SLAInvokedId
- SLAInvokedIdName
- SLAName
- TransactionCurrencyIdName
- VersionNumber

ActivityTypeCode

Property	Value
Description	Type of activity.
DisplayName	Activity Type
IsValidForForm	False
IsValidForRead	True
LogicalName	activitytypecode
RequiredLevel	SystemRequired
Type	EntityName

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the activity.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was created.
DisplayName	Date Created
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the activitypointer.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

DeliveryLastAttemptedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the delivery of the activity was last attempted.
DisplayName	Date Delivery Last Attempted
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	deliverylastattemptedon
RequiredLevel	None
Type	DateTime

ExchangeRate

Added by: Active Solution Solution

Property	Value
Description	Exchange rate for the currency associated with the activitypointer with respect to the base currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.0000000001
Precision	10
RequiredLevel	None
Type	Decimal

InstanceTypeCode

Property	Value

Property	Value
Description	Type of instance of a recurring series.
DisplayName	Recurring Instance Type
IsValidForForm	False
IsValidForRead	True
LogicalName	instancetypecode
RequiredLevel	SystemRequired
Type	Picklist

InstanceTypeCode Choices/Options

Value	Label
0	Not Recurring
1	Recurring Master
2	Recurring Instance
3	Recurring Exception
4	Recurring Future Exception

IsRegularActivity

Property	Value
Description	Information regarding whether the activity is a regular activity type or event type.
DisplayName	Is Regular Activity
IsValidForForm	False
IsValidForRead	True
LogicalName	isregularactivity
RequiredLevel	SystemRequired
Type	Boolean

IsRegularActivity Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: True

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of user who last modified the activity.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when activity was last modified.
DisplayName	Last Updated
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who last modified the activitypointer.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

msdyn_activeagentidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_activeagentidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_activeagentidYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_activeagentidyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_activesessionparticipantidName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_activesessionparticipantidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_cdsqueueidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_cdsqueueidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_customerlanguageidName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customerlanguageidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customerName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customername
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_customerYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customeryominame
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_dailytopicidName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_dailytopicidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_IssueIdName

Added by: Omnichannel – Base for Dynamics 365 Applications Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_issueidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_lastsessionidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_lastsessionidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_queueidName

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_queueidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_queueitemidName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_queueitemidname
MaxLength	300
RequiredLevel	None
Type	String

msdyn_routableobjectidName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_routableobjectidname
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_routableobjectidYomiName

Added by: Omnichannel - Base Patch Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_routableobjectidyominame
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_socialprofileidName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_socialprofileidname
MaxLength	100
RequiredLevel	None
Type	String

OnHoldTime

Added by: Active Solution Solution

Property	Value
Description	Shows how long, in minutes, that the record was on hold.
DisplayName	On Hold Time (Minutes)
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	onholdtime
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the business unit that owns the activity.
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the team that owns the activity.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user that owns the activity.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

PostponeActivityProcessingUntil

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Delay activity processing until
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	postponeactivityprocessinguntil
RequiredLevel	None
Type	DateTime

SenderMailboxId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the mailbox associated with the sender of the email message.
DisplayName	Sender's Mailbox
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	sendermailboxid
RequiredLevel	None
Targets	mailbox
Type	Lookup

SenderMailboxIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	sendermailboxidname
MaxLength	100
RequiredLevel	None
Type	String

SentOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was sent.
DisplayName	Date Sent
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	senton
RequiredLevel	None
Type	DateTime

SeriesId

Property	Value
Description	Uniqueidentifier specifying the id of recurring series of an instance.
DisplayName	Series Id
IsValidForForm	False
IsValidForRead	True
LogicalName	seriesid

Property	Value
RequiredLevel	None
Type	Uniqueidentifier

ServiceIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	serviceidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

SLAInvokedId

Added by: Active Solution Solution

Property	Value
Description	Last SLA that was applied to this case. This field is for internal use only.
DisplayName	Last SLA applied
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedid
RequiredLevel	None
Targets	sla
Type	Lookup

SLAInvokedIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedidname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

SLAName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slaname
MaxLength	100
RequiredLevel	None
Type	String

TransactionCurrencyIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version number of the activity.
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocliveworkitemcapacityprofile Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Conversation Capacity profile

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemcapacityprofiles(*msdyn_ocliveworkitemcapacityprofileid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemcapacityprofiles See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemcapacityprofiles(*msdyn_ocliveworkitemcapacityprofileid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionReques
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemcapacityprofiles(*msdyn_ocliveworkitemcapacityprofileid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemcapacityprofiles See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequ
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAnd
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemcapacityprofiles(*msdyn_ocliveworkitemcapacityprofileid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemcapacityprofiles(*msdyn_ocliveworkitemcapacityprofileid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocliveworkitemcapacityprofiles
DisplayCollectionName	Conversation Capacity profile
DisplayName	Conversation Capacity profile
EntitySetName	msdyn_ocliveworkitemcapacityprofiles
IsBPFEntity	False
LogicalCollectionName	msdyn_ocliveworkitemcapacityprofiles
LogicalName	msdyn_ocliveworkitemcapacityprofile

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocliveworkitemcapacityprofileid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocliveworkitemcapacityprofile

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_capacityprofileid
- msdyn_name
- msdyn_ocliveworkitemcapacityprofileId
- msdyn_ocliveworkitemid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_capacityprofileid

Property	Value
Description	Capacity Profile
DisplayName	Capacity Profile
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_capacityprofileid
RequiredLevel	ApplicationRequired
Targets	msdyn_capacityprofile

Property	Value
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocliveworkitemcapacityprofileId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Conversation Capacity profile
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocliveworkitemcapacityprofileid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocliveworkitemid

Property	Value
Description	Conversation
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocliveworkitem
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Conversation Capacity profile
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Conversation Capacity profile
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_capacityprofileidName
- msdyn_ocliveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_capacityprofileidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_capacityprofileidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocliveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocliveworkitemcharacteristic Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Characteristic associated to Omnichannel conversation

Added by: Omnichannel - Skill Based Routing Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcharacteristics(*msdyn_ocliveworkitemcharacteristicid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcharacteristics See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcharacteristics(*msdyn_ocliveworkitemcharacteristicid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcharacteristics(*msdyn_ocliveworkitemcharacteristicid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcharacteristics See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcharacteristics(*msdyn_ocliveworkitemcharacteristicid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcharacteristics(*msdyn_ocliveworkitemcharacteristicid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocliveworkitemcharacteristics
DisplayCollectionName	Conversation Characteristics
DisplayName	Conversation Characteristic
EntitySetName	msdyn_ocliveworkitemcharacteristics
IsBPFEntity	False
LogicalCollectionName	msdyn_ocliveworkitemcharacteristics
LogicalName	msdyn_ocliveworkitemcharacteristic

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocliveworkitemcharacteristicid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocliveworkitemcharacteristic

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_characteristic
- msdyn_characteristicsource
- msdyn_confidence
- msdyn_createdon
- msdyn_mlmodelid
- msdyn_modifiedon
- msdyn_name
- msdyn_ocliveworkitemcharacteristicId
- msdyn_ocliveworkitemid
- msdyn_ratingvalue
- msdyn_skilladdedby
- msdyn_status
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_characteristic

Property	Value
Description	Characteristic linked to the conversation
DisplayName	Characteristic

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_characteristic
RequiredLevel	ApplicationRequired
Targets	characteristic
Type	Lookup

msdyn_characteristicsource

Added by: Omnichannel - SBR Patch Solution

Property	Value
Description	Option Set with different type of Source for the characteristic
DisplayName	Source
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_characteristicsource
RequiredLevel	None
Type	Picklist

msdyn_characteristicsource Options

Value	Label
321240000	Rule Based
321240001	ML Based
321240002	Manual

msdyn_confidence

Added by: Omnichannel - SBR Patch Solution

Property	Value
Description	Confidence of the characteristic attached to the liveweotkitem
DisplayName	Confidence
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_confidence
MaxValue	1000000000
MinValue	0
Precision	2
RequiredLevel	None
Type	Double

msdyn_createdon

Property	Value
DateTimeBehavior	UserLocal
Description	Created On
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_createdon
RequiredLevel	None
Type	DateTime

msdyn_mlmodelid

Added by: Omnichannel - SBR Patch Solution

Property	Value
Description	ML Model Id which is used to attach this characteristic
DisplayName	Ml Model Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_mlmodelid
RequiredLevel	None
Targets	msdyn_aimodel
Type	Lookup

msdyn_modifiedon

Property	Value
DateTimeBehavior	UserLocal
Description	Last Modified On
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_modifiedon
RequiredLevel	None
Type	DateTime

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocliveworkitemcharacteristicId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Conversation Characteristic
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocliveworkitemcharacteristicid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocliveworkitemid

Property	Value
Description	Related Conversation
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_ratingvalue

Property	Value
Description	Required rating value for the characteristic
DisplayName	Rating Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ratingvalue
RequiredLevel	None
Targets	ratingvalue
Type	Lookup

msdyn_skilladdedby

Added by: Omnichannel - SBR Patch Solution

Property	Value
Description	Look up to User who added this characteristic
DisplayName	Skill Added By
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_skilladdedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_status

Property	Value
Description	Status of the characteristic associated to the conversation
DisplayName	Status
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_status
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_status Options

Value	Label
192350000	Active
192350001	Deleted

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Conversation Characteristic
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value

Property	Value
Description	Reason for the status of the Conversation Characteristic
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_characteristicName
- msdyn_mlmodelidName
- msdyn_ocliveworkitemidName
- msdyn_ratingvalueName
- msdyn_skilladdedbyName
- msdyn_skilladdedbyYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_characteristicName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_characteristicname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_mlmodelidName

Added by: Omnichannel - SBR Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_mlmodelidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocliveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_ratingvalueName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ratingvaluename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_skilladdedbyName

Added by: Omnichannel - SBR Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_skilladdedbyname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_skilladdedbyYomiName

Added by: Omnichannel - SBR Patch Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_skilladdedbyyominame
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_ocliveworkitemcharacteristic_msdyn_ocsessioncharacteristic_ocliveworkitemchara

Same as msdyn_ocsessioncharacteristic entity
msdyn_msdyn_ocliveworkitemcharacteristic_msdyn_ocsessioncharacteristic_ocliveworkitemcharacteristic Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocsessioncharacteristic
ReferencingAttribute	msdyn_ocliveworkitemcharacteristic
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_ocliveworkitemcharacteristic_msdyn_ocsessioncharacteristic_ocliveworkitemcharacteristic
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocliveworkitemcontextitem Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores context item values for an engagement.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcontextitems(*msdyn_ocliveworkitemcontextitemid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcontextitems See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcontextitems(*msdyn_ocliveworkitemcontextitemid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcontextitems(*msdyn_ocliveworkitemcontextitemid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcontextitems See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcces
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcontextitems(*msdyn_ocliveworkitemcontextitemid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemcontextitems(*msdyn_ocliveworkitemcontextitemid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocliveworkitemcontextitems
DisplayCollectionName	Context item values
DisplayName	Context item value
EntitySetName	msdyn_ocliveworkitemcontextitems
IsBPFEntity	False
LogicalCollectionName	msdyn_ocliveworkitemcontextitems
LogicalName	msdyn_ocliveworkitemcontextitem

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocliveworkitemcontextitemid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocliveworkitemcontextitem

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_isdisplayable
- msdyn_name
- msdyn_ocliveworkitemcontextitemId
- msdyn_ocliveworkitemid
- msdyn_ocliveworkstreamcontextvariableid
- msdyn_value
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_isdisplayable

Property	Value
Description	Flag to indicate if context items are to be displayed to agent
DisplayName	Displayable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isdisplayable
RequiredLevel	None

Property	Value
Type	Boolean

msdyn_isdisplayable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocliveworkitemcontextitemId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Context item value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocliveworkitemcontextitemid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocliveworkitemid

Property	Value
Description	Unique identifier of associated conversation
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid

Property	Value
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_ocliveworkstreamcontextvariableid

Property	Value
Description	Unique identifier of the associated context variable
DisplayName	Work stream context variable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkstreamcontextvariableid
RequiredLevel	None
Targets	msdyn_ocliveworkstreamcontextvariable
Type	Lookup

msdyn_value

Property	Value
Description	Value of context item
DisplayName	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_value
MaxLength	512
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Context item value
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Context item value
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ocliveworkitemidName
- msdyn_ocliveworkstreamcontextvariableidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ocliveworkitemidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_ocliveworkstreamcontextvariableidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkstreamcontextvariableidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_ocliveworkitem_msdyn_ocliveworkitemcontextitem_ocliveworkitemid

msdyn_msdyn_ocliveworkitem_msdyn_ocliveworkitemcontextitem_ocliveworkitemid

Added by: Active Solution Solution

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocliveworkitemparticipant Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemparticipants(*msdyn_ocliveworkitemparticipantid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemparticipants See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemparticipants(*msdyn_ocliveworkitemparticipantid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemparticipants(*msdyn_ocliveworkitemparticipantid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemparticipants See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessR
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemparticipants(*msdyn_ocliveworkitemparticipantid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkitemparticipants(*msdyn_ocliveworkitemparticipantid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocliveworkitemparticipants
DisplayCollectionName	Live Work Item Participants (Deprecated)
DisplayName	Live Work Item Participant (Deprecated)
EntitySetName	msdyn_ocliveworkitemparticipants
IsBPFEntity	False
LogicalCollectionName	msdyn_ocliveworkitemparticipants
LogicalName	msdyn_ocliveworkitemparticipant
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_ocliveworkitemparticipantid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocliveworkitemparticipant

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_addedon
- msdyn_agentid
- msdyn_joinedon
- msdyn_leavingreason
- msdyn_lefton
- msdyn_name
- msdyn_ocliveworkitemparticipantId
- msdyn_type
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_addedon

Property	Value
DateTimeBehavior	UserLocal
Description	
DisplayName	Added On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_addedon
RequiredLevel	None
Type	DateTime

msdyn_agentid

Property	Value
Description	
DisplayName	Agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_joinedon

Property	Value
DateTimeBehavior	UserLocal
Description	
DisplayName	Joined On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_joinedon
RequiredLevel	None
Type	DateTime

msdyn_leavingreason

Property	Value
Description	
DisplayName	Leaving Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_leavingreason
RequiredLevel	None
Type	Picklist

msdyn_leavingreason Options

Value	Label

Value	Label
192350000	Rejected
192350001	Disconnected
192350002	TimedOut
192350003	Item

msdyn_lefton

Property	Value
DateTimeBehavior	UserLocal
Description	
DisplayName	Left On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_lefton
RequiredLevel	None
Type	DateTime

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocliveworkitemparticipantId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Live Work Item Participant (Deprecated)
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocliveworkitemparticipantid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_type

Property	Value
Description	
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
RequiredLevel	None
Type	Picklist

msdyn_type Options

Value	Label
192350000	Primary
192350001	Consultant

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Live Work Item Participant
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Live Work Item Participant
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_agentidName
- msdyn_agentidYomiName
- OwnerIdName
- OwnerIdYomiName

- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_agentidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidname

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

msdyn_agentidYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidyominame
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocliveworkitemsentiment Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the machine learning generated customer sentiment of the communication between the user and the customer

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemsentiments(*msdyn_ocliveworkitemsentimentid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemsentiments See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemsentiments(*msdyn_ocliveworkitemsentimentid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemsentiments(*msdyn_ocliveworkitemsentimentid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemsentiments See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRe
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemsentiments(*msdyn_ocliveworkitemsentimentid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocliveworkitemsentiments(*msdyn_ocliveworkitemsentimentid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocliveworkitemsentiments
DisplayCollectionName	Conversation Sentiment
DisplayName	Conversation Sentiment
EntitySetName	msdyn_ocliveworkitemsentiments
IsBPFEntity	False
LogicalCollectionName	msdyn_ocliveworkitemsentiments
LogicalName	msdyn_ocliveworkitemsentiment

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocliveworkitemsentimentid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocliveworkitemsentiment

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_ocliveworkitemid
- msdyn_ocliveworkitemsentimentId
- msdyn_predictedlanguage
- msdyn_SentimentModelVersion
- msdyn_SentimentPulse
- msdyn_SentimentTransition
- msdyn_SentimentZone
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocliveworkitemid

Property	Value
Description	LiveWorkItem this Conversation Customer Sentiment belongs to
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_ocliveworkitemsentimentId

Property	Value
Description	Unique identifier of conversation sentiment entity
DisplayName	Conversation Sentiment
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocliveworkitemsentimentid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_predictedlanguage

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	The language predicted by the AI model
DisplayName	Predicted language
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_predictedlanguage
MaxLength	100
RequiredLevel	ApplicationRequired

Property	Value
Type	String

msdyn_SentimentModelVersion

Property	Value
Description	Sentiment Model Version which the current session was scored
DisplayName	Sentiment Model Version
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimentmodelversion
MaxLength	100
RequiredLevel	None
Type	String

msdyn_SentimentPulse

Property	Value
Description	Sentiment Pulse powered by Sentiment Service
DisplayName	Sentiment Pulse
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimentpulse
MaxValue	100
MinValue	0
Precision	2
RequiredLevel	None
Type	Double

msdyn_SentimentTransition

Property	Value
Description	Sentiment Transition
DisplayName	Sentiment Transition
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimenttransition
MaxValue	200
MinValue	-200
Precision	2
RequiredLevel	None
Type	Double

msdyn_SentimentZone

Property	Value
Description	Sentiment Zone powered by Sentiment Service
DisplayName	Sentiment Zone
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimentzone
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Conversation Sentiment
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Conversation Sentiment
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ocliveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser

- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ocliveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_ocliveworkitem_msdyn_ocliveworkitemsentiment_ocliveworkitemid

Added by: Active Solution Solution

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocliveworkstreamcontextvariable Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the context variables for a work stream.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkstreamcontextvariables(*msdyn_ocliveworkstreamcontextvariableid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocliveworkstreamcontextvariables See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocliveworkstreamcontextvariables(*msdyn_ocliveworkstreamcontextvariableid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionR
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocliveworkstreamcontextvariables(*msdyn_ocliveworkstreamcontextvariableid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocliveworkstreamcontextvariables See Query Data	RetrieveMultipleReque RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAcces
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipa
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkstreamcontextvariables(*msdyn_ocliveworkstreamcontextvariableid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocliveworkstreamcontextvariables(*msdyn_ocliveworkstreamcontextvariableid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocliveworkstreamcontextvariables
DisplayCollectionName	Context variables
DisplayName	Context variable
EntitySetName	msdyn_ocliveworkstreamcontextvariables
IsBPFEntity	False
LogicalCollectionName	msdyn_ocliveworkstreamcontextvariables
LogicalName	msdyn_ocliveworkstreamcontextvariable

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocliveworkstreamcontextvariableid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocliveworkstreamcontextvariable

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_datatype
- msdyn_displayname
- msdyn_entitylogicalname
- msdyn_isdisplayable
- msdyn_islist
- msdyn_ismodifiable
- msdyn_issystemdefined
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_ocliveworkstreamcontextvariableId
- msdyn_relationshipname
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_datatype

Property	Value
Description	Data type of context variable (int, string, entity reference)
DisplayName	Type
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_datatype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_datatype Options

Value	Label
192350000	Text
192350001	Number
192350100	Entity Reference

msdyn_displayname

Property	Value
Description	Display Name for context variable.
DisplayName	Display Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_displayname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_entitylogicalname

Property	Value
Description	Logical Name of Entity Reference.
DisplayName	Entity Logical Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entitylogicalname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_isdisplayable

Property	Value
Description	(Currently Unused)

Property	Value
DisplayName	Displayable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isdisplayable
RequiredLevel	None
Type	Boolean

msdyn_isdisplayable Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_islist

Property	Value
Description	(Currently Unused)
DisplayName	IsList
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_islist
RequiredLevel	None
Type	Boolean

msdyn_islist Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_ismodifiable

Property	Value
Description	(Currently Unused)
DisplayName	Modifiable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ismodifiable
RequiredLevel	None
Type	Boolean

msdyn_ismodifiable Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_issystemdefined

Property	Value
Description	(Currently Unused)
DisplayName	System Defined
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_issystemdefined
RequiredLevel	None
Type	Boolean

msdyn_issystemdefined Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_liveworkstreamid

Property	Value
Description	Unique identifier of the associated workstream
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocliveworkstreamcontextvariableId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Context variable
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocliveworkstreamcontextvariableid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_relationshipname

Property	Value
Description	Name of the relationship between LiveWorkItem and Referenced Entity
DisplayName	Relation Ship Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_relationshipname
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None

Property	Value
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Context variable
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active

Value	Label	DefaultStatus	InvariantName
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Context variable
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1

Property	Value
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.

Property	Value
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_ocliveworkstreamcontextvariable_createdby
- lk_msdyn_ocliveworkstreamcontextvariable_createdonbehalfby
- lk_msdyn_ocliveworkstreamcontextvariable_modifiedby
- lk_msdyn_ocliveworkstreamcontextvariable_modifiedonbehalfby
- user_msdyn_ocliveworkstreamcontextvariable

lk_msdyn_ocliveworkstreamcontextvariable_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_ocliveworkstreamcontextvariable_createdby One-To-Many relationship.

lk_msdyn_ocliveworkstreamcontextvariable_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_ocliveworkstreamcontextvariable_createdonbehalfby One-To-Many relationship.

lk_msdyn_ocliveworkstreamcontextvariable_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_ocliveworkstreamcontextvariable_modifiedby One-To-Many relationship.

lk_msdyn_ocliveworkstreamcontextvariable_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_ocliveworkstreamcontextvariable_modifiedonbehalfby One-To-Many relationship.

user_msdyn_ocliveworkstreamcontextvariable

Added by: System Solution Solution

See systemuser Entity user_msdyn_ocliveworkstreamcontextvariable One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_oclocalizationdata Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Entity used for data localization on CRM.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_oclocalizationdatas See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_oclocalizationdatas(*msdyn_oclocalizationdataid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_oclocalizationdatas(*msdyn_oclocalizationdataid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_oclocalizationdatas See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_oclocalizationdatas(*msdyn_oclocalizationdataid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_oclocalizationdatas(*msdyn_oclocalizationdataid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_oclocalizationdatas
DisplayCollectionName	Localization Data
DisplayName	Localization Data
EntitySetName	msdyn_oclocalizationdatas
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_oclocalizationdatas
LogicalName	msdyn_oclocalizationdata
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_oclocalizationdataid
PrimaryNameAttribute	msdyn_localizedtext
SchemaName	msdyn_oclocalizationdata

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_customerlanguageid
- msdyn_EntityColumnName
- msdyn_EntityName
- msdyn_EntityRecordId
- msdyn_LanguageCode
- msdyn_localizedtext
- msdyn_oclocalizationdataId
- msdyn_systemmessageid
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

msdyn_customerlanguageid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Unique identifier for Channel Language associated with Localization Data.
DisplayName	Language code
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerlanguageid
RequiredLevel	None
Targets	msdyn_oclanguage
Type	Lookup

msdyn_EntityColumnName

Property	Value
Description	The column name of the original entity to be localized.
DisplayName	Entity Column Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entitycolumnname
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_EntityName

Property	Value
Description	The name of the original entity to be localized.

Property	Value
DisplayName	Entity Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entityname
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_EntityRecordId

Property	Value
Description	The record id of the original entity.
DisplayName	Entity Record Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entityrecordid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_LanguageCode

Property	Value
Description	The target language code for the record to be localized in.
DisplayName	Language Code
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_languagecode
MaxValue	100000

Property	Value
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_localizedtext

Property	Value
Description	Localized text of the original record.
DisplayName	Localized Text
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_localizedtext
MaxLength	1000
RequiredLevel	ApplicationRequired
Type	String

msdyn_oclocalizationdataId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Localization Data
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_oclocalizationdataid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_systemmessageid

Added by: Omnichannel - Base Patch Solution

Property	Value

Property	Value
Description	Unique identifier for System Message associated with Localization Data.
DisplayName	System Message Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_systemmessageid
RequiredLevel	None
Targets	msdyn_ocsystemmessage
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Localization Data
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Localization Data
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_customerlanguageidName
- msdyn_systemmessageidName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_customerlanguageidName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_customerlanguageidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_systemmessageidName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_systemmessageidname
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization

Property	Value
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_ocsystemmessage_msdyn_oclocalizationdata

See msdyn_ocsystemmessage Entity msdyn_ocsystemmessage_msdyn_oclocalizationdata One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocoutboundconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the outbound messaging configuration settings

Added by: Omnichannel – Outbound Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocoutboundconfigurations(*msdyn_ocoutboundconfigurationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocoutboundconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocoutboundconfigurations(*msdyn_ocoutboundconfigurationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocoutboundconfigurations(*msdyn_ocoutboundconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocoutboundconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessR
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocoutboundconfigurations(*msdyn_ocoutboundconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocoutboundconfigurations(*msdyn_ocoutboundconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocoutboundconfigurations
DisplayCollectionName	Outbound Configurations
DisplayName	Outbound Configuration
EntitySetName	msdyn_ocoutboundconfigurationes
IsBPFEntity	False
LogicalCollectionName	msdyn_ocoutboundconfigurations
LogicalName	msdyn_ocoutboundconfiguration

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocoutboundconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocoutboundconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_channel
- msdyn_channelid
- msdyn_defaultlocale
- msdyn_displayoutboundconfigurationid
- msdyn_enablemessagelogging
- msdyn_messagetemplate
- msdyn_name
- msdyn_ocoutboundconfigurationId
- msdyn_showinactivities
- msdyn_type
- msdyn_usecustomerpreference
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_channel

Property	Value
Description	Channel type
DisplayName	Channel type
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_channel
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_channel Options

Value	Label
19241000	Microsoft Teams
192300000	WhatsApp
192310000	LINE
192320000	WeChat
192330000	Facebook
192340000	SMS
192350000	Entity Records
192350001	Twitter
192350002	Custom
192360000	Live chat
192370000	Voice
192380000	Video
192390000	Co-browse
192400000	Screen sharing

msdyn_channelid

Property	Value
Description	Unique Identifier for Channel associated with the channel selected
DisplayName	Channel
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channelid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_defaultlocale

Property	Value
Description	This language will be used if there’s no customer preferred language or message template in customer's language.
DisplayName	Language
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_defaultlocale
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_displayoutboundconfigurationid

Property	Value
Description	Configuration ID
DisplayName	Configuration ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_displayoutboundconfigurationid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_enablemessagelogging

Property	Value
Description	Enable Message Logging
DisplayName	Enable Message Logging
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablemessagelogging
RequiredLevel	None
Type	Boolean

msdyn_enablemessagelogging Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_messagetemplate

Property	Value
Description	Message template
DisplayName	Message template

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_messagetemplate
RequiredLevel	ApplicationRequired
Targets	msdyn_ocsystemmessage
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocoutboundconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Outbound Configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocoutboundconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_showinactivities

Property	Value
Description	If this is turned on, outbound activity record will be created in CRM.
DisplayName	Show in timeline
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_showinactivities
RequiredLevel	None
Type	Boolean

msdyn_showinactivities Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_type

Property	Value
Description	Conversation record
DisplayName	Conversation record
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_type Options

Value	Label
100000000	Create conversation when customer responds
100000001	Create conversation on send

msdyn_usecustomerpreference

Property	Value
Description	Use Customer Preferred channel
DisplayName	Use Customer Preferred channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_usecustomerpreference
RequiredLevel	None
Type	Boolean

msdyn_usecustomerpreference Options

Value	Label
1	Yes
0	No

DefaultValue: False

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Outbound Configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Outbound Configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_defaultlocaleName
- msdyn_messagetemplateName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_defaultlocaleName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_defaultlocalename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_messagetemplateName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_messagetemplatename
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_ocoutboundmessage_msdyn_ocoutbound

Same as msdyn_ocoutboundmessage entity msdyn_ocoutboundmessage_msdyn_ocoutbound Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocoutboundmessage
ReferencingAttribute	msdyn_ocoutboundconfiguration
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_ocoutboundmessage_msdyn_ocoutbound
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_oclanguage_msdyn_ocoutboundconfiguration_defaultlocale

Added by: Omnichannel - Base Patch Solution

See msdyn_oclanguage Entity msdyn_msdyn_oclanguage_msdyn_ocoutboundconfiguration_defaultlocale One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocoutboundmessage Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Outbound activity entity

Added by: Omnichannel – Outbound Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocoutboundmessages(*msdyn_ocoutboundmessageid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocoutboundmessages See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocoutboundmessages(*msdyn_ocoutboundmessageid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocoutboundmessages(*msdyn_ocoutboundmessageid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocoutboundmessages See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocoutboundmessages(*msdyn_ocoutboundmessageid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocoutboundmessages(*msdyn_ocoutboundmessageid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocoutboundmessages
DisplayCollectionName	Outbound messages
DisplayName	Outbound message
EntitySetName	msdyn_ocoutboundmessages
IsBPFEntity	False
LogicalCollectionName	msdyn_ocoutboundmessages
LogicalName	msdyn_ocoutboundmessage

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	activityid
PrimaryNameAttribute	subject
SchemaName	msdyn_ocoutboundmessage

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ActivityAdditionalParams
- ActivityId
- ActualDurationMinutes
- ActualEnd
- ActualStart
- BCC
- CC
- Community
- Customers
- DeliveryPriorityCode
- Description
- ExchangeItemId
- ExchangeWebLink
- From
- ImportSequenceNumber
- IsBilled
- IsMapiPrivate
- IsWorkflowCreated
- LastOnHoldTime
- LeftVoiceMail
- msdyn_occhannelprovidername
- msdyn_occhanneltype
- msdyn_occustomerlocale
- msdyn_ocliveworkstreamid
- msdyn_ocmessagetext
- msdyn_ocmessagetype
- msdyn_ocoutboundconfiguration
- msdyn_ocReceiverChannelId
- msdyn_ocsenderChannelId
- OptionalAttendees
- Organizer
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- Partners
- PriorityCode
- ProcessId
- RegardingObjectId
- RegardingObjectIdName
- RegardingObjectIdYomiName
- RegardingObjectTypeCode
- RequiredAttendees
- Resources
- ScheduledDurationMinutes
- ScheduledEnd
- ScheduledStart
- ServiceId
- SLAId
- SortDate

- StageId
- StateCode
- StatusCode
- Subject
- TimeZoneRuleVersionNumber
- To
- TransactionCurrencyId
- TraversedPath
- UTCConversionTimeZoneCode

ActivityAdditionalParams

Property	Value
Description	Additional information provided by the external application as JSON. For internal use only.
DisplayName	Activity Additional Parameters
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	activityadditionalparams
MaxLength	8192
RequiredLevel	None
Type	Memo

ActivityId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the activity.
DisplayName	Activity
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	activityid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ActualDurationMinutes

Property	Value
Description	Actual duration of the activity in minutes.
DisplayName	Actual Duration
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	actualdurationminutes

Property	Value
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

ActualEnd

Property	Value
DateTimeBehavior	UserLocal
Description	Actual end time of the activity.
DisplayName	Actual End
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	actualend
RequiredLevel	None
Type	DateTime

ActualStart

Property	Value
DateTimeBehavior	UserLocal
Description	Actual start time of the activity.
DisplayName	Actual Start
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	actualstart
RequiredLevel	None
Type	DateTime

BCC

Added by: Active Solution Solution

Property	Value
Description	Blind Carbon-copy (bcc) recipients of the activity.
DisplayName	BCC
IsValidForForm	True
IsValidForRead	True
LogicalName	bcc
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

CC

Added by: Active Solution Solution

Property	Value
Description	Carbon-copy (cc) recipients of the activity.
DisplayName	CC
IsValidForForm	True
IsValidForRead	True
LogicalName	cc
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

Community

Property	Value
Description	Shows how contact about the social activity originated, such as from Twitter or Facebook. This field is read-only.
DisplayName	Social Channel
IsValidForForm	False
IsValidForRead	True
LogicalName	community
RequiredLevel	None
Type	Picklist

Community Options

Value	Label
0	Other
1	Facebook
2	Twitter
3	Line
4	Wechat
5	Cortana
6	Direct Line
7	Microsoft Teams
8	Direct Line Speech
9	Email
10	GroupMe
11	Kik
12	Telegram
13	Skype
14	Slack
15	WhatsApp

Customers

Added by: Active Solution Solution

Property	Value
Description	Customer with which the activity is associated.
DisplayName	Customers
IsValidForForm	True
IsValidForRead	True
LogicalName	customers
RequiredLevel	None
Targets	account,contact
Type	PartyList

DeliveryPriorityCode

Property	Value
Description	Priority of delivery of the activity to the email server.
DisplayName	Delivery Priority
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	deliveryprioritycode
RequiredLevel	None
Type	Picklist

DeliveryPriorityCode Options

Value	Label
0	Low
1	Normal
2	High

Description

Property	Value
Description	Description of the activity.
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	description
MaxLength	2000
RequiredLevel	None

Property	Value
Type	Memo

ExchangeItemId

Property	Value
Description	The message id of activity which is returned from Exchange Server.
DisplayName	Exchange Item ID
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	exchangeitemid
MaxLength	200
RequiredLevel	None
Type	String

ExchangeWebLink

Property	Value
Description	Shows the web link of Activity of type email.
DisplayName	Exchange WebLink
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	exchangeweblink
MaxLength	1250
RequiredLevel	None
Type	String

From

Added by: Active Solution Solution

Property	Value
Description	Person who the activity is from.
DisplayName	From
IsValidForForm	True
IsValidForRead	True
LogicalName	from
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsBilled

Property	Value
Description	Information regarding whether the activity was billed as part of resolving a case.
DisplayName	Is Billed
IsValidForForm	False
IsValidForRead	True
LogicalName	isbilled
RequiredLevel	None
Type	Boolean

IsBilled Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsMapiPrivate

Property	Value
Description	For internal use only.
DisplayName	Is Private
IsValidForForm	False
IsValidForRead	True
LogicalName	ismapiprivate
RequiredLevel	None
Type	Boolean

IsMapiPrivate Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsWorkflowCreated

Property	Value
Description	Information regarding whether the activity was created from a workflow rule.
DisplayName	Is Workflow Created
IsValidForForm	False
IsValidForRead	True
LogicalName	isworkflowcreated
RequiredLevel	None
Type	Boolean

IsWorkflowCreated Options

Value	Label
1	Yes
0	No

DefaultValue: False

LastOnHoldTime

Added by: Active Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	Contains the date and time stamp of the last on hold time.
DisplayName	Last On Hold Time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	lastonholdtime
RequiredLevel	None
Type	DateTime

LeftVoiceMail

Property	Value
Description	Left the voice mail
DisplayName	Left Voice Mail
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	leftvoicemail
RequiredLevel	None
Type	Boolean

LeftVoiceMail Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_occhannelprovidername

Property	Value
Description	Channel Provider Name.
DisplayName	Channel Provider Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_occhannelprovidername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_occhanneltype

Property	Value
Description	The channel(s) in the conversation.
DisplayName	Channel Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_occhanneltype
RequiredLevel	None
Type	MultiSelectPicklist

msdyn_occhanneltype Options

Value	Label
19241000	Microsoft Teams
192300000	WhatsApp
192310000	LINE
192320000	WeChat

Value	Label
192330000	Facebook
192340000	SMS
192350000	Entity Records
192350001	Twitter
192350002	Custom
192360000	Live chat
192370000	Voice
192380000	Video
192390000	Co-browse
192400000	Screen sharing

msdyn_occustomerlocale

Property	Value
Description	Customer preferred locale
DisplayName	Customer locale
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_occustomerlocale
RequiredLevel	None
Targets	msdyn_oclanguage
Type	Lookup

msdyn_ocliveworkstreamid

Property	Value
Description	Work stream associated to the conversation
DisplayName	Live Work Stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkstreamid
RequiredLevel	None
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_ocmessagetext

Property	Value
Description	Message text.
DisplayName	Message text
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_ocmessagetext
MaxLength	2000
RequiredLevel	None
Type	String

msdyn_ocmessagetype

Property	Value
Description	Message type
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocmessagetype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_ocmessagetype Options

Value	Label
100000000	Create conversation when customer responds
100000001	Create conversation on send

msdyn_ocoutboundconfiguration

Property	Value
Description	Associated Outbound Configuration.
DisplayName	Outbound Configuration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocoutboundconfiguration
RequiredLevel	ApplicationRequired
Targets	msdyn_ocoutboundconfiguration
Type	Lookup

msdyn_ocReceiverChannelId

Property	Value
Description	This can be an SMS number, Facebook page id, etc.
DisplayName	Receiver channel ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_ocreceiverchannelid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocsenderChannelId

Property	Value
Description	This can be an SMS number, Facebook page id, etc.
DisplayName	Sender channel ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocsenderchannelid
MaxLength	100
RequiredLevel	None
Type	String

OptionalAttendees

Added by: Active Solution Solution

Property	Value
Description	List of optional attendees for the activity.
DisplayName	Optional Attendees
IsValidForForm	True
IsValidForRead	True
LogicalName	optionalattendees
RequiredLevel	None
Targets	account,contact,entitlement,equipment,knowledgearticle,lead,queue,systemuser,unresolvedaddress
Type	PartyList

Organizer

Added by: Active Solution Solution

Property	Value
Description	Person who organized the activity.
DisplayName	Organizer
IsValidForForm	True
IsValidForRead	True
LogicalName	organizer
RequiredLevel	None

Property	Value
Targets	systemuser
Type	PartyList

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user or team who owns the activity.
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

Partners

Added by: Active Solution Solution

Property	Value
Description	Outsource vendor with which activity is associated.
DisplayName	Outsource Vendors
IsValidForForm	True
IsValidForRead	True
LogicalName	partners
RequiredLevel	None
Targets	account,contact
Type	PartyList

PriorityCode

Property	Value
Description	Priority of the activity.
DisplayName	Priority
IsValidForForm	True
IsValidForRead	True
LogicalName	prioritycode
RequiredLevel	None
Type	Picklist

PriorityCode Options

Value	Label
0	Low
1	Normal
2	High

ProcessId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the Process.
DisplayName	Process
IsValidForForm	False
IsValidForRead	True
LogicalName	processid
RequiredLevel	None
Type	Uniqueidentifier

RegardingObjectId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the object with which the activity is associated.
DisplayName	Regarding
IsValidForForm	True
IsValidForRead	True
LogicalName	regardingobjectid
RequiredLevel	None
Targets	account,adx_ad,adx_adplacement,adx_casedeflection,adx_communityforumaccesspermission,adx_communityforumalert,adx_contentaccesslevel,adx_ir
Type	Lookup

RegardingObjectIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjectidname
MaxLength	400
RequiredLevel	None
Type	String

RegardingObjectIdYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjectidyominame
MaxLength	400
RequiredLevel	None
Type	String

RegardingObjectTypeCode

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjecttypecode
RequiredLevel	None
Type	EntityName

RequiredAttendees

Added by: Active Solution Solution

Property	Value
Description	List of required attendees for the activity.
DisplayName	Required Attendees
IsValidForForm	True
IsValidForRead	True
LogicalName	requiredattendees
RequiredLevel	None
Targets	account,contact,entitlement,equipment,knowledgearticle,lead,queue,systemuser,unresolvedaddress
Type	PartyList

Resources

Added by: Active Solution Solution

Property	Value
Description	Users or facility/equipment that are required for the activity.
DisplayName	Resources
IsValidForForm	True
IsValidForRead	True
LogicalName	resources
RequiredLevel	None
Targets	equipment,systemuser
Type	PartyList

ScheduledDurationMinutes

Property	Value
Description	Scheduled duration of the activity, specified in minutes.
DisplayName	Scheduled Duration
Format	Duration
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	scheduledurationminutes
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

ScheduledEnd

Property	Value
DateTimeBehavior	UserLocal
Description	Scheduled end time of the activity.
DisplayName	Due Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledend
RequiredLevel	None
Type	DateTime

ScheduledStart

Property	Value
DateTimeBehavior	UserLocal
Description	Scheduled start time of the activity.
DisplayName	Start Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledstart
RequiredLevel	None
Type	DateTime

ServiceId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of an associated service.
DisplayName	Service
IsValidForForm	False
IsValidForRead	True
LogicalName	serviceid
RequiredLevel	None
Targets	service

Property	Value
Type	Lookup

SLAId

Added by: Active Solution Solution

Property	Value
Description	Choose the service level agreement (SLA) that you want to apply to the case record.
DisplayName	SLA
IsValidForForm	True
IsValidForRead	True
LogicalName	slaid
RequiredLevel	None
Targets	sla
Type	Lookup

SortDate

Property	Value
DateTimeBehavior	UserLocal
Description	Shows the date and time by which the activities are sorted.
DisplayName	Sort Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	sortdate
RequiredLevel	None
Type	DateTime

StageId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the Stage.
DisplayName	(Deprecated) Process Stage
IsValidForForm	False
IsValidForRead	True
LogicalName	stageid
RequiredLevel	None
Type	Uniqueidentifier

StateCode

Property	Value

Property	Value
Description	Status of the activity.
DisplayName	Activity Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Options

Value	Label	DefaultStatus	InvariantName
0	Open	1	Open
1	Completed	2	Completed
2	Canceled	3	Canceled
3	Scheduled	4	Scheduled

StatusCode

Property	Value
Description	Reason for the status of the activity.
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

StatusCode Options

Value	Label	State
1	Open	0
2	Completed	1
3	Canceled	2
4	Scheduled	3

Subject

Property	Value
Description	Subject associated with the activity.
DisplayName	Subject
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	subject
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

To

Added by: Active Solution Solution

Property	Value
Description	Person who is the receiver of the activity.
DisplayName	To
IsValidForForm	True
IsValidForRead	True
LogicalName	to
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

TransactionCurrencyId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the currency associated with the activitypointer.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid

Property	Value
RequiredLevel	None
Targets	transactioncurrency
Type	Lookup

TraversedPath

Added by: Active Solution Solution

Property	Value
Description	For internal use only.
DisplayName	(Deprecated) Traversed Path
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	traversedpath
MaxLength	1250
RequiredLevel	None
Type	String

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ActivityTypeCode
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- DeliveryLastAttemptedOn
- ExchangeRate

- InstanceTypeCode
- IsRegularActivity
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_occustomerlocaleName
- msdyn_ocliveworkstreamidName
- msdyn_ocoutboundconfigurationName
- OnHoldTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- PostponeActivityProcessingUntil
- SenderMailboxId
- SenderMailboxIdName
- SentOn
- SeriesId
- ServiceIdName
- SLAInvokedId
- SLAInvokedIdName
- SLAName
- TransactionCurrencyIdName
- VersionNumber

ActivityTypeCode

Property	Value
Description	Type of activity.
DisplayName	Activity Type
IsValidForForm	False
IsValidForRead	True
LogicalName	activitytypecode
RequiredLevel	SystemRequired
Type	EntityName

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the activity.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was created.
DisplayName	Date Created
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon

Property	Value
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the activitypointer.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

DeliveryLastAttemptedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the delivery of the activity was last attempted.
DisplayName	Date Delivery Last Attempted
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	deliverylastattemptedon
RequiredLevel	None
Type	DateTime

ExchangeRate

Added by: Active Solution Solution

Property	Value
Description	Exchange rate for the currency associated with the activitypointer with respect to the base currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.0000000001
Precision	10
RequiredLevel	None
Type	Decimal

InstanceTypeCode

Property	Value
Description	Type of instance of a recurring series.
DisplayName	Recurring Instance Type
IsValidForForm	False
IsValidForRead	True
LogicalName	instancetypecode
RequiredLevel	SystemRequired
Type	Picklist

InstanceTypeCode Options

Value	Label
0	Not Recurring
1	Recurring Master
2	Recurring Instance
3	Recurring Exception
4	Recurring Future Exception

IsRegularActivity

Property	Value
Description	Information regarding whether the activity is a regular activity type or event type.
DisplayName	Is Regular Activity
IsValidForForm	False
IsValidForRead	True
LogicalName	isregularactivity
RequiredLevel	SystemRequired
Type	Boolean

IsRegularActivity Options

Value	Label
1	Yes
0	No

DefaultValue: True

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of user who last modified the activity.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when activity was last modified.
DisplayName	Last Updated
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the delegate user who last modified the activitypointer.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

msdyn_occustomerlocaleName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_occustomerlocalename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocliveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocoutboundconfigurationName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocoutboundconfigurationname
MaxLength	100
RequiredLevel	None
Type	String

OnHoldTime

Added by: Active Solution Solution

Property	Value
Description	Shows how long, in minutes, that the record was on hold.
DisplayName	On Hold Time (Minutes)
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	onholdtime
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the business unit that owns the activity.
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the team that owns the activity.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user that owns the activity.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

PostponeActivityProcessingUntil

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Delay activity processing until

Property	Value
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	postponeactivityprocessinguntil
RequiredLevel	None
Type	DateTime

SenderMailboxId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the mailbox associated with the sender of the email message.
DisplayName	Sender's Mailbox
IsValidForForm	False
IsValidForRead	True
LogicalName	sendermailboxid
RequiredLevel	None
Targets	mailbox
Type	Lookup

SenderMailboxIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	sendermailboxidname
MaxLength	100
RequiredLevel	None
Type	String

SentOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was sent.
DisplayName	Date Sent
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	senton
RequiredLevel	None
Type	DateTime

SeriesId

Property	Value
Description	Uniqueidentifier specifying the id of recurring series of an instance.
DisplayName	Series Id
IsValidForForm	False
IsValidForRead	True
LogicalName	seriesid
RequiredLevel	None
Type	Uniqueidentifier

ServiceIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	serviceidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

SLAInvokedId

Added by: Active Solution Solution

Property	Value
Description	Last SLA that was applied to this case. This field is for internal use only.
DisplayName	Last SLA applied
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedid
RequiredLevel	None

Property	Value
Targets	sla
Type	Lookup

SLAInvokedIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedidname
MaxLength	100
RequiredLevel	None
Type	String

SLAName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slaname
MaxLength	100
RequiredLevel	None
Type	String

TransactionCurrencyIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version number of the activity.
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_ocoutboundmessage_msdyn_ocoutbound
- msdyn_ocoutboundmessage_occustomerlocale

msdyn_ocoutboundmessage_msdyn_ocoutbound

See msdyn_ocoutboundconfiguration Entity msdyn_ocoutboundmessage_msdyn_ocoutbound One-To-Many relationship.

msdyn_ocoutboundmessage_occustomerlocale

Added by: Omnichannel - Base Patch Solution

See msdyn_oclanguage Entity msdyn_ocoutboundmessage_occustomerlocale One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocphonenumber Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - CommunicationBase Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocphonenumbers(*msdyn_ocphonenumberid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocphonenumbers See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocphonenumbers(*msdyn_ocphonenumberid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocphonenumbers(*msdyn_ocphonenumberid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocphonenumbers See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocphonenumbers(*msdyn_ocphonenumberid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocphonenumbers(*msdyn_ocphonenumberid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocphonenumbers
DisplayCollectionName	Phone Numbers
DisplayName	Phone Number
EntitySetName	msdyn_ocphonenumbers
IsBPFEntity	False
LogicalCollectionName	msdyn_ocphonenumbers

Property	Value
LogicalName	msdyn_ocphonenumber
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocphonenumberid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocphonenumber

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_countryisocode
- msdyn_FormattedPhoneNumber
- msdyn_name
- msdyn_occommunicationprovidersettingId
- msdyn_ocphonenumberId
- msdyn_phoneinboundenabled
- msdyn_phonenumber
- msdyn_phoneoutboundenabled
- msdyn_smsinboundenabled
- msdyn_smsoutboundenabled
- msdyn_type
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_countryisocode

Property	Value
Description	ISO code for the country
DisplayName	Country ISO Code
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_countryisocode
MaxLength	3
RequiredLevel	None
Type	String

msdyn_FormattedPhoneNumber

Property	Value
Description	Readable field to display a phone number
DisplayName	Formatted Phone Number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_formattedphonenumber
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_occommunicationprovidersettingId

Property	Value
Description	Unique identifier for Communication Provider Setting associated with Phone Number.
DisplayName	Communication provider setting
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_occommunicationprovidersettingid
RequiredLevel	None
Targets	msdyn_occommunicationprovidersetting
Type	Lookup

msdyn_ocphonenumberId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Phone number
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocphonenumberid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_phoneinboundenabled

Property	Value
Description	Indicates if inbound calling is enabled on the phone number
DisplayName	Phone Inbound Enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_phoneinboundenabled
RequiredLevel	None
Type	Boolean

msdyn_phoneinboundenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_phonenumber

Property	Value
Description	The phone number of the phone number entity.
DisplayName	Phone number
FormatName	Phone
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_phonenumber
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_phoneoutboundenabled

Property	Value
Description	Indicates if inbound calling is enabled on the phone number
DisplayName	Phone Outbound Enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_phoneoutboundenabled
RequiredLevel	None
Type	Boolean

msdyn_phoneoutboundenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_smsinboundenabled

Property	Value
Description	Indicates if inbound SMS is enabled on the phonenumber
DisplayName	SMS Inbound Enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_smsinboundenabled
RequiredLevel	None
Type	Boolean

msdyn_smsinboundenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_smsoutboundenabled

Property	Value
Description	Indicates if outbound SMS is enabled on the phone number
DisplayName	SMS Outbound Enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_smsoutboundenabled
RequiredLevel	None
Type	Boolean

msdyn_smsoutboundenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_type

Property	Value
Description	The phone number type
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
RequiredLevel	None
Type	Picklist

msdyn_type Options

Value	Label
192350000	Geo
192350001	Toll free
192350002	Short code

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the phone number

Property	Value
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the phone number
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_occommunicationprovidersettingIdName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_occommunicationprovidersettingIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_occommunicationprovidersettingidname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocphonecallengagementctx Entity Reference

Article • 10/28/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - Telephony Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocphonecallengagementctxes(*msdyn_ocphonecallengagementctxid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocphonecallengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocphonecallengagementctxes(*msdyn_ocphonecallengagementctxid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocphonecallengagementctxes(*msdyn_ocphonecallengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocphonecallengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocphonecallengagementctxes(*msdyn_ocphonecallengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocphonecallengagementctxes(*msdyn_ocphonecallengagementctxid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_ocphonecallengagementctxes
DisplayCollectionName	Phone Call Engagement Contexts
DisplayName	Phone Call Engagement Context
EntitySetName	msdyn_ocphonecallengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_ocphonecallengagementctxes
LogicalName	msdyn_ocphonecallengagementctx
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_ocphonecallengagementctxid
PrimaryNameAttribute	msdyn_callername
SchemaName	msdyn_ocphonecallengagementctx

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_callername
- msdyn_callsid
- msdyn_fromphone
- msdyn_liveworkitemid
- msdyn_ocphonecallengagementctxId
- msdyn_providername
- msdyn_tophone
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_callername

Property	Value
Description	The name of the caller.
DisplayName	Caller Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_callername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_callsid

Property	Value
Description	Unique identifier for the call
DisplayName	Call Identifier
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_callsid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_fromphone

Property	Value
Description	Phone number from which the call is initiated
DisplayName	Customer phone number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_fromphone
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique identifier for Conversation associated with Phone Call Engagement Context.
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem

Property	Value
Type	Lookup

msdyn_ocphonecallengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Phone Call Engagement Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocphonecallengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_providername

Property	Value
Description	Communication provider name
DisplayName	Provider Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_providername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_tophone

Property	Value
Description	Phone number where the call is made to
DisplayName	Organization phone number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_tophone
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Phone Call Engagement Context
DisplayName	Status
IsValidForCreate	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Phone Call Engagement Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocprovisioningstate Entity reference

Article • 11/08/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Provisioning state

Added by: Omnichannel Shared Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocprovisioningstates(*msdyn_ocprovisioningstateid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocprovisioningstates See Create	CreateRequest or Create
CreateMultiple		Microsoft.Xrm.Sdk.Messages.CreateMultipleRequ
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocprovisioningstates(*msdyn_ocprovisioningstateid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocprovisioningstates(*msdyn_ocprovisioningstateid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocprovisioningstates See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocprovisioningstates(*msdyn_ocprovisioningstateid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocprovisioningstates(*msdyn_ocprovisioningstateid*) See Update	UpdateRequest or Update
UpdateMultiple		Microsoft.Xrm.Sdk.Messages.UpdateMultipleReq

Properties

Property	Value
CollectionSchemaName	msdyn_ocprovisioningstates
DisplayCollectionName	Provisioning States
DisplayName	Provisioning State
EntitySetName	msdyn_ocprovisioningstates
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_ocprovisioningstates
LogicalName	msdyn_ocprovisioningstate
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocprovisioningstateid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocprovisioningstate

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_communicationprovidersettingid
- msdyn_errormessage
- msdyn_exceptiondetails
- msdyn_name
- msdyn_ocfbapplicationid
- msdyn_ocfbpageid
- msdyn_oclinechannelconfigid
- msdyn_ocprovisioningstateId
- msdyn_octeamschannelconfigid
- msdyn_ocwhatsappchannelaccountId
- msdyn_phonenumberid
- msdyn_provisioningresponse
- msdyn_voicechannelsettingid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_communicationprovidersettingid

Added by: Omnichannel Shared CommunicationBase Solution

Property	Value
Description	Related Communication Provider Settings
DisplayName	CommunicationProviderSettings
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_communicationprovidersettingid
RequiredLevel	None
Targets	msdyn_occommunicationprovidersetting
Type	Lookup

msdyn_errormessage

Property	Value
Description	Additional details
DisplayName	Additional details
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_errormessage
MaxLength	8192
RequiredLevel	None
Type	Memo

msdyn_exceptiondetails

Added by: Omnichannel - Facebook Patch Solution

Property	Value
Description	Exception Details during channel provisioning
DisplayName	Error Message (Deprecated)
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_exceptiondetails
MaxLength	8192
RequiredLevel	ApplicationRequired
Type	Memo

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocfbapplicationid

Added by: Omnichannel – Facebook Solution

Property	Value
Description	Related Facebook application
DisplayName	Facebook Application
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocfbapplicationid
RequiredLevel	None
Targets	msdyn_ocfbapplication
Type	Lookup

msdyn_ocfbpageid

Added by: Omnichannel – Facebook Solution

Property	Value
Description	Related Facebook page
DisplayName	Facebook Page
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocfbpageid
RequiredLevel	None
Targets	msdyn_ocfbpage
Type	Lookup

msdyn_oclinechannelconfigid

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Related Line Channel
DisplayName	Line Channel
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_oclinechannelconfigid
RequiredLevel	None
Targets	msdyn_oclinechannelconfig
Type	Lookup

msdyn_ocprovisioningstateId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Provisioning State
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocprovisioningstateid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_octeamschannelconfigid

Added by: Omnichannel - Teams Solution

Property	Value
Description	Related Teams Channel
DisplayName	Teams Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_octeamschannelconfigid
RequiredLevel	None
Targets	msdyn_octeamschannelconfig
Type	Lookup

msdyn_ocwhatsappchannelaccountId

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Related WhatsApp Account
DisplayName	WhatsApp Account
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwhatsappchannelaccountid
RequiredLevel	None
Targets	msdyn_ocwhatsappchannelaccount

Property	Value
Type	Lookup

msdyn_phonenumberid

Added by: Omnichannel Shared CommunicationBase Solution

Property	Value
Description	Related Phone Number
DisplayName	Phone Number
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_phonenumberid
RequiredLevel	None
Targets	msdyn_ocphonenumber
Type	Lookup

msdyn_provisioningresponse

Property	Value
Description	Response for the provisioning action
DisplayName	msdyn_provisioningresponse
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_provisioningresponse
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_voicechannelsettingid

Added by: Omnichannel - Telephony Solution

Property	Value
Description	
DisplayName	voicechannelsettingsid
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_voicechannelsettingid
RequiredLevel	None
Targets	msdyn_ocvoicechannelsetting
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Provisioning State
DisplayName	Status
IsValidForCreate	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	192350001	Active
1	Inactive	192350003	Inactive

statuscode

Property	Value
Description	Reason for the status of the Provisioning State
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
192350001	Draft	0
192350002	Processing	0
192350003	Running	0
192350004	Error	0
192350005	Deprovisioning	0
192350006	Deprovisioned	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1

Property	Value
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_communicationprovidersettingidName
- msdyn_ocfbapplicationidName
- msdyn_ocfbpageidName
- msdyn_oclinechannelconfigidName
- msdyn_octeamschannelconfigidName
- msdyn_ocwhatsappchannelaccountIdName
- msdyn_phonenumberidName
- msdyn_voicechannelsettingidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_communicationprovidersettingidName

Added by: Omnichannel Shared CommunicationBase Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_communicationprovidersettingidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocfbapplicationidName

Added by: Omnichannel – Facebook Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocfbapplicationidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocfbpageidName

Added by: Omnichannel – Facebook Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocfbpageidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_oclinechannelconfigidName

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_oclinechannelconfigidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_octeamschannelconfigidName

Added by: Omnichannel - Teams Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_octeamschannelconfigidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwhatsappchannelaccountIdName

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwhatsappchannelaccountidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_phonenumberidName

Added by: Omnichannel Shared CommunicationBase Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_phonenumberidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_voicechannelsettingidName

Added by: Omnichannel - Telephony Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_voicechannelsettingidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

About the Entity Reference
Web API Reference

msdyn_ocrecording Entity Reference

Article • 03/17/2023

> **Note**
>
> Unsure about table vs. entity? See **Developers: Understand terminology in Microsoft Dataverse**. Records the audio/video session

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocrecordings(*msdyn_ocrecordingid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocrecordings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocrecordings(*msdyn_ocrecordingid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocrecordings(*msdyn_ocrecordingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocrecordings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocrecordings(*msdyn_ocrecordingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocrecordings(*msdyn_ocrecordingid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_ocrecordings
DisplayCollectionName	Recordings
DisplayName	Recording

Property	Value
EntitySetName	msdyn_ocrecordings
IsBPFEntity	False
LogicalCollectionName	msdyn_ocrecordings
LogicalName	msdyn_ocrecording
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocrecordingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocrecording

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_liveworkitemid
- msdyn_mediauri
- msdyn_name
- msdyn_ocrecordingId
- msdyn_sourcelanguage
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_liveworkitemid

Property	Value
Description	Unique Identifier of Conversation associated to the recording
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_mediauri

Property	Value
Description	Media URI associated to the recording
DisplayName	Media URI
FormatName	Url
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_mediauri
MaxLength	500
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocrecordingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Recording
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocrecordingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_sourcelanguage

Property	Value
Description	Language of recording source
DisplayName	Source Language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sourcelanguage
RequiredLevel	None
Targets	msdyn_oclanguage
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Recording
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active

Value	Label	DefaultStatus	InvariantName
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Recording
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- msdyn_recording_Name
- msdyn_recordingmetadata_Name
- msdyn_sourcelanguageName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_recording_Name

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_recording_name
MaxLength	200
RequiredLevel	None
Type	String

msdyn_recordingmetadata_Name

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	msdyn_recordingmetadata_name
MaxLength	200
RequiredLevel	None
Type	String

msdyn_sourcelanguageName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_sourcelanguagename
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

About the Entity Reference
Web API Reference

msdyn_ocrequest Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Entity to store Requests across Omnichannel.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocrequests(*msdyn_ocrequestid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocrequests See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocrequests(*msdyn_ocrequestid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocrequests(*msdyn_ocrequestid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocrequests See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocrequests(*msdyn_ocrequestid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocrequests(*msdyn_ocrequestid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocrequests
DisplayCollectionName	Omnichannel Requests

Property	Value
DisplayName	Omnichannel Request
EntitySetName	msdyn_ocrequests
IsBPFEntity	False
LogicalCollectionName	msdyn_ocrequests
LogicalName	msdyn_ocrequest
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocrequestid
PrimaryNameAttribute	msdyn_requestname
SchemaName	msdyn_ocrequest

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_LiveWorkItemId
- msdyn_ocrequestId
- msdyn_requestname
- msdyn_RequestProperties
- msdyn_RequestType
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None

Property	Value
Type	Integer

msdyn_LiveWorkItemId

Property	Value
Description	The live work item id associated with the request.
DisplayName	LiveWorkItemId
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_ocrequestId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Omnichannel Request
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocrequestid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_requestname

Property	Value
Description	The name of the request record.
DisplayName	Request Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_requestname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

msdyn_RequestProperties

Property	Value
Description	Additional properties of the request.
DisplayName	Request properties
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_requestproperties
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_RequestType

Property	Value
Description	The type of the request.
DisplayName	Request type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_requesttype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_RequestType Options

Value	Label
192350000	Email transcript request

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.

Property	Value
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value

Property	Value
Description	The status of the request
DisplayName	Request status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	192350001	Active
1	Inactive	0	Inactive

statuscode

Property	Value
Description	The state of the request status
DisplayName	Request status reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
192350000	New	0
192350001	In progress	0
192350003	Completed	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number

Property	Value
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_LiveWorkItemIdName

- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_LiveWorkItemIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None

Property	Value
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocruleitem Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the condition and destination including Omnichannel queues or agents

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocruleitems(*msdyn_ocruleitemid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocruleitems See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocruleitems(*msdyn_ocruleitemid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocruleitems(*msdyn_ocruleitemid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocruleitems See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocruleitems(*msdyn_ocruleitemid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocruleitems(*msdyn_ocruleitemid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocruleitems
DisplayCollectionName	Rule Items

Property	Value
DisplayName	Rule Item
EntitySetName	msdyn_ocruleitems
IsBPFEntity	False
LogicalCollectionName	msdyn_ocruleitems
LogicalName	msdyn_ocruleitem
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocruleitemid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocruleitem

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- Description
- ImportSequenceNumber
- msdyn_Action
- msdyn_Assignedto
- msdyn_cdsqueueassignid
- msdyn_Condition
- msdyn_Expression
- msdyn_liveworkstream
- msdyn_name
- msdyn_ocruleitemId
- msdyn_priority
- msdyn_QueueAssignId
- msdyn_Rulejson
- msdyn_UserAssignId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

Description

Property	Value
Description	Description of the rule item.
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	description
MaxLength	2000
RequiredLevel	None
Type	Memo

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_Action

Property	Value
Description	Action expression of Rule item in Omni channel
DisplayName	Action
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_action
MaxLength	10000
RequiredLevel	None
Type	Memo

msdyn_Assignedto

Property	Value

Property	Value
Description	Assigned to User or Queue.
DisplayName	Assigned to
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_assignedto
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_Assignedto Options

Value	Label
1	Queue
2	Agent

msdyn_cdsqueueassignid

Property	Value
Description	Assigned Queue Id
DisplayName	Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_cdsqueueassignid
RequiredLevel	ApplicationRequired
Targets	queue
Type	Lookup

msdyn_Condition

Property	Value
Description	Condition expression FetchXML of RuleItem
DisplayName	Condition
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_condition
MaxLength	10000
RequiredLevel	None

Property	Value
Type	Memo

msdyn_Expression

Property	Value
Description	Condition expression Json of RuleItem
DisplayName	Expression
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_expression
MaxLength	10000
RequiredLevel	None
Type	Memo

msdyn_liveworkstream

Property	Value
Description	The Work stream that this Rule item belongs to
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstream
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name

Property	Value
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocruleitemId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Rule item
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocruleitemid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_priority

Property	Value
Description	Priority of Rule item in a Work stream
DisplayName	Priority
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_priority
MaxLength	4000
RequiredLevel	SystemRequired
Type	String

msdyn_QueueAssignId

Property	Value
Description	Assigned Queue Id
DisplayName	Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueassignid

Property	Value
RequiredLevel	ApplicationRequired
Targets	msdyn_omnichannelqueue
Type	Lookup

msdyn_Rulejson

Property	Value
Description	Metadata Json of RuleItem
DisplayName	Rule Json
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_rulejson
MaxLength	10000
RequiredLevel	None
Type	Memo

msdyn_UserAssignId

Property	Value
Description	Assigned User Id
DisplayName	Agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_userassignid
RequiredLevel	None
Targets	systemuser
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False

Property	Value
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Rule item
DisplayName	Status
IsValidForCreate	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Rule item
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_cdsqueueassignidName
- msdyn_liveworkstreamName
- msdyn_QueueAssignIdName
- msdyn_UserAssignIdName
- msdyn_UserAssignIdYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam

- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_cdsqueueassignidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_cdsqueueassignidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_liveworkstreamName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	msdyn_liveworkstreamname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_QueueAssignIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_queueassignidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_UserAssignIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_userassignidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_UserAssignIdYomiName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_userassignidyominame
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsentimentdailytopic Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

1. store properties regarding each topic cluster
2. used for dashboard visualization (like topic example) and calculation for topic mapping

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopics(*msdyn_ocsentimentdailytopicid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopics See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopics(*msdyn_ocsentimentdailytopicid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopics(*msdyn_ocsentimentdailytopicid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopics See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopics(*msdyn_ocsentimentdailytopicid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopics(*msdyn_ocsentimentdailytopicid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsentimentdailytopics
DisplayCollectionName	Sentiment daily topic
DisplayName	Sentiment daily topic
EntitySetName	msdyn_ocsentimentdailytopics
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsentimentdailytopics

Property	Value
LogicalName	msdyn_ocsentimentdailytopic
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocsentimentdailytopicid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsentimentdailytopic

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_conversationcount
- msdyn_conversationexample
- msdyn_name
- msdyn_ocsentimentdailytopicId
- msdyn_sentimentdriverintradayweightimpact
- msdyn_sentimentscore
- msdyn_topiccountpercentage
- msdyn_topicdate
- msdyn_topicindex
- msdyn_topicname
- msdyn_weeklyid
- msdyn_weeklytopicid
- msdyn_weeklytopicname
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_conversationcount

Property	Value

Property	Value
Description	The volume of chat sessions within this topic cluster
DisplayName	Conversation count
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_conversationcount
MaxValue	2147483647
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_conversationexample

Property	Value
Description	3 Chat conversation examples from this topic cluster
DisplayName	Conversation example
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_conversationexample
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocsentimentdailytopicId

Property	Value
Description	Daily Topic Id

Property	Value
DisplayName	Topic Unique Id
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsentimentdailytopicid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_sentimentdriverintradayweightimpact

Property	Value
Description	Intraday sentiment driver: The sentiment weighted impact value from this topic cluster on the day's average sentiment score
DisplayName	Sentiment driver intraday weight impact
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimentdriverintradayweightimpact
MaxValue	100
MinValue	-100
Precision	3
RequiredLevel	Recommended
Type	Double

msdyn_sentimentscore

Property	Value
Description	The average sentiment score for all the chat sessions within the topic cluster
DisplayName	Sentiment score
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimentscore
MaxValue	1000000000
MinValue	0
Precision	3
RequiredLevel	ApplicationRequired
Type	Double

msdyn_topiccountpercentage

Property	Value
Description	The percentage of this topic chat session volume in the total daily chat session volume
DisplayName	Topic count percentage
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_topiccountpercentage
MaxValue	1000000000
MinValue	0
Precision	3
RequiredLevel	ApplicationRequired
Type	Double

msdyn_topicdate

Property	Value
DateTimeBehavior	UserLocal
Description	Date of the Topic
DisplayName	Topic date
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_topicdate
RequiredLevel	ApplicationRequired
Type	DateTime

msdyn_topicindex

Property	Value
Description	The topic cluster id from clustering algorithm -1 represent outlier cluster. Positive number like 5 represent topic cluster
DisplayName	Topic index
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_topicindex
MaxValue	2147483647
MinValue	-100
RequiredLevel	None
Type	Integer

msdyn_topicname

Property	Value
Description	A combination of top noun keyword and verb keyword, which is used for dashboard visualization
DisplayName	Topic name
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_topicname
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_weeklyid

Property	Value
Description	Weekly Id for the topic
DisplayName	Weekly id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_weeklyid
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_weeklytopicid

Property	Value
Description	Weekly TopicId for the topic
DisplayName	Weekly topic id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_weeklytopicid
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_weeklytopicname

Property	Value
Description	Weekly Topic Name for the topic
DisplayName	Weekly topic name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_weeklytopicname
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired

Property	Value
Type	EntityName

statecode

Property	Value
Description	Status of the Sentiment daily topic
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Sentiment daily topic
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopickeyword_dailytopicid
- msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopictrending_basetopicid
- msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopictrending_dailytopicid

msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopickeyword_dailytopicid

Same as msdyn_ocsentimentdailytopickeyword entity
msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopickeyword_dailytopicid Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocsentimentdailytopickeyword
ReferencingAttribute	msdyn_dailytopicid
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopickeyword_dailytopicid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopictrending_basetopicid

Same as msdyn_ocsentimentdailytopictrending entity
msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopictrending_basetopicid Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocsentimentdailytopictrending
ReferencingAttribute	msdyn_basetopicid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopictrending_basetopicid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopictrending_dailytopicid

Same as msdyn_ocsentimentdailytopictrending entity
msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopictrending_dailytopicid Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocsentimentdailytopictrending
ReferencingAttribute	msdyn_dailytopicid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopictrending_dailytopicid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsentimentdailytopickeyword Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

1. Store the keyword and frequency for topic clusters
2. Used for word cloud in the dashboard

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopickeywords(*msdyn_ocsentimentdailytopickeywordid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopickeywords See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopickeywords(*msdyn_ocsentimentdailytopickeywordid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionReque
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopickeywords(*msdyn_ocsentimentdailytopickeywordid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopickeywords See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessReq
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAn
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopickeywords(*msdyn_ocsentimentdailytopickeywordid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopickeywords(*msdyn_ocsentimentdailytopickeywordid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsentimentdailytopickeywords
DisplayCollectionName	Sentiment daily topic keyword
DisplayName	Sentiment daily topic keyword
EntitySetName	msdyn_ocsentimentdailytopickeywords
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsentimentdailytopickeywords

Property	Value
LogicalName	msdyn_ocsentimentdailytopickeyword
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocsentimentdailytopickeywordid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsentimentdailytopickeyword

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_dailytopicid
- msdyn_Keywords
- msdyn_name
- msdyn_ocsentimentdailytopickeywordId
- msdyn_weeklyid
- msdyn_weeklytopicid
- msdyn_weeklytopicname
- msdyn_wordfrequency
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_dailytopicid

Property	Value
Description	Look up to the daily topic entity
DisplayName	TopicID
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_dailytopicid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocsentimentdailytopic
Type	Lookup

msdyn_Keywords

Property	Value
Description	Noun and verb keywords in the cluster sessions
DisplayName	Keywords
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_keywords
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocsentimentdailytopickeywordId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Sentiment daily topic keyword
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsentimentdailytopickeywordid
RequiredLevel	SystemRequired

Property	Value
Type	Uniqueidentifier

msdyn_weeklyid

Property	Value
Description	Weekly Id for the topic
DisplayName	Weekly Id for the topic
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_weeklyid
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_weeklytopicid

Property	Value
Description	Weekly Topic Id for the topic
DisplayName	Weekly Topic Id for the topic
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_weeklytopicid
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_weeklytopicname

Property	Value
Description	Weekly Topic Name for the topic
DisplayName	Weekly Topic Name for the topic
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_weeklytopicname
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	String

msdyn_wordfrequency

Property	Value
Description	The word occurrence times in the cluster
DisplayName	Word frequency
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_wordfrequency
MaxValue	2147483647
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Sentiment daily topic keyword
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Sentiment daily topic keyword
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_dailytopicidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser

- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_dailytopicidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_dailytopicidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopickeyword_dailytopicid

See msdyn_ocsentimentdailytopic Entity msdyn_msdyn_ocsentimentdailytopic_msdyn_ocsentimentdailytopickeyword_dailytopicid One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsentimentdailytopictrending Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

1. Store the day to day topic mapping information
2. Used for dashboard visualization

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopictrendings(*msdyn_ocsentimentdailytopictrendingid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopictrendings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopictrendings(*msdyn_ocsentimentdailytopictrendingid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionReque
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopictrendings(*msdyn_ocsentimentdailytopictrendingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopictrendings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessReq
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAr
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopictrendings(*msdyn_ocsentimentdailytopictrendingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsentimentdailytopictrendings(*msdyn_ocsentimentdailytopictrendingid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsentimentdailytopictrendings
DisplayCollectionName	Sentiment daily topic trending
DisplayName	Sentiment daily topic trending
EntitySetName	msdyn_ocsentimentdailytopictrendings
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsentimentdailytopictrendings

Property	Value
LogicalName	msdyn_ocsentimentdailytopictrending
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocsentimentdailytopictrendingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsentimentdailytopictrending

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_basetopicid
- msdyn_dailytopicid
- msdyn_name
- msdyn_ocsentimentdailytopictrendingId
- msdyn_similarityscore
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_basetopicid

Property	Value
Description	Look up to the daily topic entity
DisplayName	Base topic id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_basetopicid
RequiredLevel	ApplicationRequired

Property	Value
Targets	msdyn_ocsentimentdailytopic
Type	Lookup

msdyn_dailytopicid

Property	Value
Description	Foreign key to sentiment_topic table column: sentiment_dailytopicid
DisplayName	Daily topic id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_dailytopicid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocsentimentdailytopic
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocsentimentdailytopictrendingId

Property	Value
Description	Topic mapping id for sentiment trend
DisplayName	Topic mapping id
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsentimentdailytopictrendingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_similarityscore

Property	Value

Property	Value
Description	The cosine similarity score between the base topic and daily topic
DisplayName	Similarity score
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_similarityscore
MaxValue	100
MinValue	-100
Precision	3
RequiredLevel	ApplicationRequired
Type	Double

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Sentiment daily topic trending
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Sentiment daily topic trending
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_basetopicidName
- msdyn_dailytopicidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam

- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_basetopicidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_basetopicidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_dailytopicidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_dailytopicidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsession table

Article • 08/02/2023

Session for interacting with a customer

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsessions(*activityid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocsessions See Create	CreateRequest or Create
CreateMultiple	CreateMultiple Action	CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocsessions(*activityid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocsessions(*activityid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocsessions See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsessions(*activityid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsessions(*activityid*) See Update	UpdateRequest or Update
UpdateMultiple	UpdateMultiple Action	UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_ocsessions
DisplayCollectionName	Sessions
DisplayName	Session
EntitySetName	msdyn_ocsessions
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsessions
LogicalName	msdyn_ocsession
OwnershipType	UserOwned
PrimaryIdAttribute	activityid
PrimaryNameAttribute	subject
SchemaName	msdyn_ocsession

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ActivityAdditionalParams
- ActivityId
- ActualDurationMinutes
- ActualEnd
- ActualStart
- BCC
- CC
- Community
- Customers
- DeliveryPriorityCode
- Description
- ExchangeItemId
- ExchangeWebLink
- From
- ImportSequenceNumber
- IsBilled
- IsMapiPrivate
- IsWorkflowCreated
- LastOnHoldTime
- LeftVoiceMail
- msdyn_agentacceptedon
- msdyn_agentassignedon
- msdyn_botengagementmode
- msdyn_cdsqueueid
- msdyn_channel
- msdyn_channelinstanceid
- msdyn_closurereason
- msdyn_liveworkitemid
- msdyn_primarysession
- msdyn_queueassignedon
- msdyn_queueassignedreason
- msdyn_queueid
- msdyn_routingfailurestage
- msdyn_sessionclosedon
- msdyn_sessioncreatedon
- msdyn_sessioncreationreason
- msdyn_sessionid
- msdyn_sessionmodifiedon
- msdyn_state
- OptionalAttendees
- Organizer
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- Partners
- PriorityCode
- ProcessId
- RegardingObjectId
- RegardingObjectIdName
- RegardingObjectIdYomiName
- RegardingObjectTypeCode
- RequiredAttendees
- Resources
- ScheduledDurationMinutes
- ScheduledEnd
- ScheduledStart
- ServiceId

- SLAId
- SortDate
- StageId
- StateCode
- StatusCode
- Subject
- TimeZoneRuleVersionNumber
- To
- TransactionCurrencyId
- TraversedPath
- UTCConversionTimeZoneCode

ActivityAdditionalParams

Property	Value
Description	Additional information provided by the external application as JSON. For internal use only.
DisplayName	Activity Additional Parameters
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	activityadditionalparams
MaxLength	8192
RequiredLevel	None
Type	Memo

ActivityId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the activity.
DisplayName	Activity
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	activityid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ActualDurationMinutes

Property	Value
Description	Actual duration of the activity in minutes.
DisplayName	Actual Duration
Format	Duration
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	actualdurationminutes
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

ActualEnd

Property	Value
DateTimeBehavior	UserLocal
Description	Actual end time of the activity.
DisplayName	Actual End
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	actualend
RequiredLevel	None
Type	DateTime

ActualStart

Property	Value
DateTimeBehavior	UserLocal
Description	Actual start time of the activity.
DisplayName	Actual Start
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	actualstart
RequiredLevel	None
Type	DateTime

BCC

Added by: Active Solution Solution

Property	Value
Description	Blind Carbon-copy (bcc) recipients of the activity.
DisplayName	BCC
IsValidForForm	True
IsValidForRead	True
LogicalName	bcc
RequiredLevel	None
Targets	account,contact,lead,systemuser

Property	Value
Type	PartyList

CC

Added by: Active Solution Solution

Property	Value
Description	Carbon-copy (cc) recipients of the activity.
DisplayName	CC
IsValidForForm	True
IsValidForRead	True
LogicalName	cc
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

Community

Property	Value
Description	Shows how contact about the social activity originated, such as from Twitter or Facebook. This field is read-only.
DisplayName	Social Channel
IsValidForForm	False
IsValidForRead	True
LogicalName	community
RequiredLevel	None
Type	Picklist

Community Choices/Options

Value	Label
0	Other
1	Facebook
2	Twitter
3	Line
4	Wechat
5	Cortana
6	Direct Line
7	Microsoft Teams
8	Direct Line Speech
9	Email
10	GroupMe
11	Kik
12	Telegram
13	Skype

Value	Label
14	Slack
15	WhatsApp
16	Apple Messages For Business
17	Google's Business Messages

Customers

Added by: Active Solution Solution

Property	Value
Description	Customer with which the activity is associated.
DisplayName	Customers
IsValidForForm	True
IsValidForRead	True
LogicalName	customers
RequiredLevel	None
Targets	account,contact
Type	PartyList

DeliveryPriorityCode

Property	Value
Description	Priority of delivery of the activity to the email server.
DisplayName	Delivery Priority
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	deliveryprioritycode
RequiredLevel	None
Type	Picklist

DeliveryPriorityCode Choices/Options

Value	Label
0	Low
1	Normal
2	High

Description

Property	Value
Description	Description of the activity.
DisplayName	Description
Format	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	description
MaxLength	2000
RequiredLevel	None
Type	Memo

ExchangeItemId

Property	Value
Description	The message id of activity which is returned from Exchange Server.
DisplayName	Exchange Item ID
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	exchangeitemid
MaxLength	200
RequiredLevel	None
Type	String

ExchangeWebLink

Property	Value
Description	Shows the web link of Activity of type email.
DisplayName	Exchange WebLink
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	exchangeweblink
MaxLength	1250
RequiredLevel	None
Type	String

From

Added by: Active Solution Solution

Property	Value
Description	Person who the activity is from.
DisplayName	From
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	from
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsBilled

Property	Value
Description	Information regarding whether the activity was billed as part of resolving a case.
DisplayName	Is Billed
IsValidForForm	False
IsValidForRead	True
LogicalName	isbilled
RequiredLevel	None
Type	Boolean

IsBilled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsMapiPrivate

Property	Value
Description	For internal use only.

Property	Value
DisplayName	Is Private
IsValidForForm	False
IsValidForRead	True
LogicalName	ismapiprivate
RequiredLevel	None
Type	Boolean

IsMapiPrivate Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsWorkflowCreated

Property	Value
Description	Information regarding whether the activity was created from a workflow rule.
DisplayName	Is Workflow Created
IsValidForForm	False
IsValidForRead	True
LogicalName	isworkflowcreated
RequiredLevel	None
Type	Boolean

IsWorkflowCreated Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

LastOnHoldTime

Added by: Active Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	Contains the date and time stamp of the last on hold time.
DisplayName	Last On Hold Time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	lastonholdtime

Property	Value
RequiredLevel	None
Type	DateTime

LeftVoiceMail

Property	Value
Description	Left the voice mail
DisplayName	Left Voice Mail
IsValidForForm	True
IsValidForRead	True
LogicalName	leftvoicemail
RequiredLevel	None
Type	Boolean

LeftVoiceMail Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_agentacceptedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when session was accepted by agent
DisplayName	Agent Accepted On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentacceptedon
RequiredLevel	None
Type	DateTime

msdyn_agentassignedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when session was assigned to agent
DisplayName	Agent Assigned On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_agentassignedon
RequiredLevel	None
Type	DateTime

msdyn_botengagementmode

Property	Value
Description	Indicates when a bot was engaged
DisplayName	Bot Engagement Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_botengagementmode
RequiredLevel	None
Type	Picklist

msdyn_botengagementmode Choices/Options

Value	Label
192350000	Default
192350001	PreConversation
192350002	PostConverstation
192350003	OffBusinessHour

msdyn_cdsqueueid

Property	Value
Description	Unique identifier for Queue associated with Session.
DisplayName	Queue Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_cdsqueueid
RequiredLevel	None
Targets	queue
Type	Lookup

msdyn_channel

Property	Value
Description	The channel type of the session
DisplayName	Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channel
RequiredLevel	None

Property	Value
Type	Picklist

msdyn_channel Choices/Options

Value	Label
19241000	Microsoft Teams
192300000	WhatsApp
192310000	LINE
192320000	WeChat
192330000	Facebook
192340000	SMS
192350000	Entity Records
192350001	Twitter
192350002	Custom
192360000	Live chat
192370000	Voice
192380000	Video
192390000	Co-browse
192400000	Screen sharing
192440000	Voice call
192450000	Apple Messages for Business
192450001	Google's Business Messages

msdyn_channelinstanceid

Property	Value
Description	Unique identifier to identify the app to which this conversation belongs to.
DisplayName	Channel Instance ID
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channelinstanceid
RequiredLevel	None
Targets	msdyn_channelinstance
Type	Lookup

msdyn_closurereason

Property	Value
Description	Reason for session closure
DisplayName	Closure Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_closurereason

Property	Value
RequiredLevel	None
Type	Picklist

msdyn_closurereason Choices/Options

Value	Label
192350000	Default
192350001	AgentReject
192350002	AgentTimeout
192350003	ConversationTimeout
192350004	AgentClosed
192350005	ConversationClosed
192350006	AgentTransfered
192350007	AgentDisconnected
192350008	AgentReRouted
192350009	VirtualAgentClosed
192350010	AgentTransferToQueue
192350011	SupervisorAssignToQueue
192350012	SupervisorTransferToAgent
192350013	SystemReject
192350014	ForceClose
192350015	OverflowQueueTransfer
192350016	OverflowEndConversation
192350017	AddAgentFailed
192350018	AutoClose
192350019	SecondaryChannelClosed
192350020	CustomerDisconnect
192350021	AgentEndConversation
192350022	CustomerEndConversation

msdyn_liveworkitemid

Property	Value
Description	Unique Identifier of Conversation associated to the session
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_primarysession

Property	Value
Description	Reference to primary session.
DisplayName	Primary Session
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_primarysession
RequiredLevel	None
Targets	msdyn_ocsession
Type	Lookup

msdyn_queueassignedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when queue was assigned to session
DisplayName	Queue Assigned On
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueassignedon
RequiredLevel	None
Type	DateTime

msdyn_queueassignedreason

Property	Value
Description	Reason for Queue Assignment (This is for internal use only. Customers are advised to not use this property.)
DisplayName	Queue Assignment Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueassignedreason
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_queueid

Property	Value
Description	Queue associated to the session
DisplayName	Queue Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueid

Property	Value
RequiredLevel	None
Targets	msdyn_omnichannelqueue
Type	Lookup

msdyn_routingfailurestage

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Routing Failure Stage
DisplayName	Routing Failure Stage
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routingfailurestage
RequiredLevel	None
Type	Picklist

msdyn_routingfailurestage Choices/Options

Value	Label
10	None
1000	Record Identification
2000	Demand Classification

msdyn_sessionclosedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when session was closed
DisplayName	Session Closed On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessionclosedon
RequiredLevel	None
Type	DateTime

msdyn_sessioncreatedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when session was created
DisplayName	Session Created On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessioncreatedon
RequiredLevel	None
Type	DateTime

msdyn_sessioncreationreason

Property	Value
Description	Reason for session creation (This is for internal use only. Customers are advised to not use this property.)
DisplayName	Created Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessioncreationreason
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_sessionid

Property	Value
Description	Unique Identifier of Session
DisplayName	Session Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessionid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_sessionmodifiedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when session was last modified
DisplayName	Session Modified On
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessionmodifiedon
RequiredLevel	None
Type	DateTime

msdyn_state

Property	Value
Description	(Deprecated)
DisplayName	State
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_state
RequiredLevel	None
Type	Picklist

msdyn_state Choices/Options

Value	Label
192350000	Default
192350001	Active
192350002	Closed
192350003	New

OptionalAttendees

Added by: Active Solution Solution

Property	Value
Description	List of optional attendees for the activity.
DisplayName	Optional Attendees
IsValidForForm	True
IsValidForRead	True
LogicalName	optionalattendees
RequiredLevel	None
Targets	account,contact,entitlement,equipment,knowledgearticle,lead,msdyn_salessuggestion,queue,systemuser,unresolvedaddress
Type	PartyList

Organizer

Added by: Active Solution Solution

Property	Value
Description	Person who organized the activity.
DisplayName	Organizer
IsValidForForm	True
IsValidForRead	True
LogicalName	organizer
RequiredLevel	None
Targets	systemuser
Type	PartyList

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user or team who owns the activity.
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

Partners

Added by: Active Solution Solution

Property	Value
Description	Outsource vendor with which activity is associated.

Property	Value
DisplayName	Outsource Vendors
IsValidForForm	True
IsValidForRead	True
LogicalName	partners
RequiredLevel	None
Targets	account,contact
Type	PartyList

PriorityCode

Property	Value
Description	Priority of the activity.
DisplayName	Priority
IsValidForForm	True
IsValidForRead	True
LogicalName	prioritycode
RequiredLevel	None
Type	Picklist

PriorityCode Choices/Options

Value	Label
0	Low
1	Normal
2	High

ProcessId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the Process.
DisplayName	Process
IsValidForForm	False
IsValidForRead	True
LogicalName	processid
RequiredLevel	None
Type	Uniqueidentifier

RegardingObjectId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the object with which the activity is associated.

Property	Value
DisplayName	Regarding
IsValidForForm	True
IsValidForRead	True
LogicalName	regardingobjectid
RequiredLevel	None
Targets	account,adx_ad,adx_adplacement,adx_invitation,adx_poll,adx_polloption,adx_pollplacement,adx_pollsubmission,adx_publishingstatetransitionrule,adx_
Type	Lookup

RegardingObjectIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjectidname
MaxLength	400
RequiredLevel	None
Type	String

RegardingObjectIdYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjectidyominame
MaxLength	400
RequiredLevel	None
Type	String

RegardingObjectTypeCode

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	regardingobjecttypecode
RequiredLevel	None
Type	EntityName

RequiredAttendees

Added by: Active Solution Solution

Property	Value
Description	List of required attendees for the activity.
DisplayName	Required Attendees
IsValidForForm	True
IsValidForRead	True
LogicalName	requiredattendees
RequiredLevel	None
Targets	account,contact,entitlement,equipment,knowledgearticle,lead,msdyn_salessuggestion,queue,systemuser,unresolvedaddress
Type	PartyList

Resources

Added by: Active Solution Solution

Property	Value
Description	Users or facility/equipment that are required for the activity.
DisplayName	Resources
IsValidForForm	True
IsValidForRead	True
LogicalName	resources
RequiredLevel	None
Targets	equipment,systemuser
Type	PartyList

ScheduledDurationMinutes

Property	Value
Description	Scheduled duration of the activity, specified in minutes.
DisplayName	Scheduled Duration
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledurationminutes
MaxValue	2147483647

Property	Value
MinValue	0
RequiredLevel	None
Type	Integer

ScheduledEnd

Property	Value
DateTimeBehavior	UserLocal
Description	Scheduled end time of the activity.
DisplayName	Due Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledend
RequiredLevel	None
Type	DateTime

ScheduledStart

Property	Value
DateTimeBehavior	UserLocal
Description	Scheduled start time of the activity.
DisplayName	Start Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	scheduledstart
RequiredLevel	None
Type	DateTime

ServiceId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of an associated service.
DisplayName	Service
IsValidForForm	False
IsValidForRead	True
LogicalName	serviceid
RequiredLevel	None
Targets	service
Type	Lookup

SLAId

Added by: Active Solution Solution

Property	Value
Description	Choose the service level agreement (SLA) that you want to apply to the case record.
DisplayName	SLA
IsValidForForm	True
IsValidForRead	True
LogicalName	slaid
RequiredLevel	None
Targets	sla
Type	Lookup

SortDate

Property	Value
DateTimeBehavior	UserLocal
Description	Shows the date and time by which the activities are sorted.
DisplayName	Sort Date
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	sortdate
RequiredLevel	None
Type	DateTime

StageId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the Stage.
DisplayName	Process Stage
IsValidForForm	False
IsValidForRead	True
LogicalName	stageid
RequiredLevel	None
Type	Uniqueidentifier

StateCode

Property	Value
Description	Status of the activity.
DisplayName	Activity Status
IsValidForCreate	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Open	1	Open
1	Completed	2	Completed
2	Canceled	3	Canceled
3	Scheduled	4	Scheduled

StatusCode

Property	Value
Description	Reason for the status of the activity.
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

StatusCode Choices/Options

Value	Label	State
1	Open	0
2	Completed	1
3	Canceled	2
4	Scheduled	3

Subject

Property	Value
Description	Subject associated with the activity.
DisplayName	Subject
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	subject
MaxLength	200

Property	Value
RequiredLevel	ApplicationRequired
Type	String

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

To

Added by: Active Solution Solution

Property	Value
Description	Person who is the receiver of the activity.
DisplayName	To
IsValidForForm	True
IsValidForRead	True
LogicalName	to
RequiredLevel	None
Targets	account,contact,lead,systemuser
Type	PartyList

TransactionCurrencyId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the currency associated with the activitypointer.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid
RequiredLevel	None
Targets	transactioncurrency
Type	Lookup

TraversedPath

Added by: Active Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Traversed Path
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	traversedpath
MaxLength	1250
RequiredLevel	None
Type	String

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ActivityTypeCode
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- DeliveryLastAttemptedOn
- ExchangeRate
- InstanceTypeCode
- IsRegularActivity
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy

- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_cdsqueueidName
- msdyn_channelinstanceidName
- msdyn_liveworkitemidName
- msdyn_primarysessionName
- msdyn_queueidName
- msft_DataState
- OnHoldTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- PostponeActivityProcessingUntil
- SenderMailboxId
- SenderMailboxIdName
- SentOn
- SeriesId
- ServiceIdName
- SLAInvokedId
- SLAInvokedIdName
- SLAName
- TransactionCurrencyIdName
- VersionNumber

ActivityTypeCode

Property	Value
Description	Type of activity.
DisplayName	Activity Type
IsValidForForm	False
IsValidForRead	True
LogicalName	activitytypecode
RequiredLevel	SystemRequired
Type	EntityName

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the activity.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was created.
DisplayName	Date Created
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the activitypointer.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

DeliveryLastAttemptedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the delivery of the activity was last attempted.
DisplayName	Date Delivery Last Attempted
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	deliverylastattemptedon
RequiredLevel	None
Type	DateTime

ExchangeRate

Added by: Active Solution Solution

Property	Value
Description	Exchange rate for the currency associated with the activitypointer with respect to the base currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.000000000001
Precision	12
RequiredLevel	None
Type	Decimal

InstanceTypeCode

Property	Value
Description	Type of instance of a recurring series.
DisplayName	Recurring Instance Type
IsValidForForm	False
IsValidForRead	True
LogicalName	instancetypecode
RequiredLevel	SystemRequired
Type	Picklist

InstanceTypeCode Choices/Options

Value	Label
0	Not Recurring
1	Recurring Master
2	Recurring Instance
3	Recurring Exception
4	Recurring Future Exception

IsRegularActivity

Property	Value
Description	Information regarding whether the activity is a regular activity type or event type.
DisplayName	Is Regular Activity
IsValidForForm	False
IsValidForRead	True
LogicalName	isregularactivity
RequiredLevel	SystemRequired
Type	Boolean

IsRegularActivity Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: True

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of user who last modified the activity.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when activity was last modified.
DisplayName	Last Updated
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who last modified the activitypointer.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

msdyn_cdsqueueidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_cdsqueueidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_channelinstanceidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_channelinstanceidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_primarysessionName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_primarysessionname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_queueidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_queueidname
MaxLength	100
RequiredLevel	None
Type	String

msft_DataState

Added by: Basic Solution Solution

Property	Value
Description	
DisplayName	msft_DataState
IsValidForForm	True
IsValidForRead	True
LogicalName	msft_datastate
RequiredLevel	None
Type	Picklist

msft_DataState Choices/Options

Value	Label
0	Default
1	Retain

OnHoldTime

Added by: Active Solution Solution

Property	Value
Description	Shows how long, in minutes, that the record was on hold.
DisplayName	On Hold Time (Minutes)
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	onholdtime
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None

Property	Value
Type	Integer

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the business unit that owns the activity.
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None

Property	Value
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	160
RequiredLevel	None
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the team that owns the activity.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user that owns the activity.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

PostponeActivityProcessingUntil

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Delay activity processing until
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	postponeactivityprocessinguntil
RequiredLevel	None
Type	DateTime

SenderMailboxId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the mailbox associated with the sender of the email message.
DisplayName	Sender's Mailbox
IsValidForForm	False
IsValidForRead	True
LogicalName	sendermailboxid
RequiredLevel	None
Targets	mailbox
Type	Lookup

SenderMailboxIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	sendermailboxidname
MaxLength	100
RequiredLevel	None
Type	String

SentOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the activity was sent.
DisplayName	Date Sent
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	senton
RequiredLevel	None
Type	DateTime

SeriesId

Property	Value
Description	Uniqueidentifier specifying the id of recurring series of an instance.
DisplayName	Series Id
IsValidForForm	False
IsValidForRead	True
LogicalName	seriesid
RequiredLevel	None
Type	Uniqueidentifier

ServiceIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	serviceidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

SLAInvokedId

Added by: Active Solution Solution

Property	Value
Description	Last SLA that was applied to this case. This field is for internal use only.

Property	Value
DisplayName	Last SLA applied
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedid
RequiredLevel	None
Targets	sla
Type	Lookup

SLAInvokedIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slainvokedidname
MaxLength	100
RequiredLevel	None
Type	String

SLAName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	slaname
MaxLength	100
RequiredLevel	None
Type	String

TransactionCurrencyIdName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version number of the activity.
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_msdyn_ocsession_msdyn_ocsession_primarysession
- msdyn_ocsession_sessionevent_nested

msdyn_msdyn_ocsession_msdyn_ocsession_primarysession

Same as msdyn_ocsession table msdyn_msdyn_ocsession_msdyn_ocsession_primarysession Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocsession
ReferencingAttribute	msdyn_primarysession
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_ocsession_msdyn_ocsession_primarysession
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade

Property	Value
	Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_ocsession_sessionevent_nested

Same as msdyn_sessionevent table msdyn_ocsession_sessionevent_nested Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_sessionevent
ReferencingAttribute	msdyn_omnichannelsession
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_ocsession_sessionevent_nested
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related table. Listed by **SchemaName**.

msdyn_msdyn_ocsession_msdyn_ocsession_primarysession

Added by: Active Solution Solution

See msdyn_ocsession Table msdyn_msdyn_ocsession_msdyn_ocsession_primarysession One-To-Many relationship.

See also

Omnichannel for Customer Service entity reference
Web API Reference

msdyn_ocsessioncharacteristic Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Characteristic associated to Omnichannel session

Added by: Omnichannel - Skill Based Routing Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsessioncharacteristics(*msdyn_ocsessioncharacteristicid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocsessioncharacteristics See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocsessioncharacteristics(*msdyn_ocsessioncharacteristicid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocsessioncharacteristics(*msdyn_ocsessioncharacteristicid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocsessioncharacteristics See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReques
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsessioncharacteristics(*msdyn_ocsessioncharacteristicid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsessioncharacteristics(*msdyn_ocsessioncharacteristicid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsessioncharacteristics
DisplayCollectionName	Session Characteristics
DisplayName	Session Characteristic
EntitySetName	msdyn_ocsessioncharacteristics
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsessioncharacteristics
LogicalName	msdyn_ocsessioncharacteristic

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocsessioncharacteristicid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsessioncharacteristic

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_ocliveworkitemcharacteristic
- msdyn_ocsession
- msdyn_ocsessioncharacteristicId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocliveworkitemcharacteristic

Property	Value
Description	Associated Conversation Characteristic
DisplayName	Conversation Characteristic
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemcharacteristic
RequiredLevel	ApplicationRequired
Targets	msdyn_ocliveworkitemcharacteristic
Type	Lookup

msdyn_ocsession

Property	Value
Description	Associated session
DisplayName	Session
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocsession
RequiredLevel	ApplicationRequired
Targets	msdyn_ocsession
Type	Lookup

msdyn_ocsessioncharacteristicId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Session Characteristic
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsessioncharacteristicid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Session Characteristic
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Session Characteristic
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ocliveworkitemcharacteristicName
- msdyn_ocsessionName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ocliveworkitemcharacteristicName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemcharacteristicname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocsessionName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocsessionname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_ocliveworkitemcharacteristic_msdyn_ocsessioncharacteristic_ocliveworkitemchara

See msdyn_ocliveworkitemcharacteristic Entity
msdyn_msdyn_ocliveworkitemcharacteristic_msdyn_ocsessioncharacteristic_ocliveworkitemcharacteristic One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsessionparticipantevent Entity Reference

Article • 10/28/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsessionparticipantevents(*msdyn_ocsessionparticipanteventid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocsessionparticipantevents See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocsessionparticipantevents(*msdyn_ocsessionparticipanteventid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocsessionparticipantevents(*msdyn_ocsessionparticipanteventid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocsessionparticipantevents See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessR
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsessionparticipantevents(*msdyn_ocsessionparticipanteventid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsessionparticipantevents(*msdyn_ocsessionparticipanteventid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_ocsessionparticipantevents
DisplayCollectionName	Session Participant Events
DisplayName	Session Participant Event
EntitySetName	msdyn_ocsessionparticipantevents
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsessionparticipantevents
LogicalName	msdyn_ocsessionparticipantevent
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_ocsessionparticipanteventid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsessionparticipantevent

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_eventduration
- msdyn_eventendtime
- msdyn_eventreason
- msdyn_eventstarttime
- msdyn_eventtype
- msdyn_name
- msdyn_ocsessionparticipanteventId
- msdyn_sessionid
- msdyn_sessionparticipantid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_eventduration

Property	Value
Description	
DisplayName	Event Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventduration

Property	Value
MaxValue	100000000000
MinValue	-100000000000
Precision	2
RequiredLevel	None
Type	Decimal

msdyn_eventendtime

Property	Value
DateTimeBehavior	UserLocal
Description	Event end time
DisplayName	Event end time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventendtime
RequiredLevel	None
Type	DateTime

msdyn_eventreason

Property	Value
Description	Event reason
DisplayName	Event Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventreason
RequiredLevel	None
Type	Picklist

msdyn_eventreason Choices/Options

Value	Label
192350000	Agent Initiated
192350001	Session Transfer In Transit
192350002	Session Transfer Accepted

msdyn_eventstarttime

Property	Value
DateTimeBehavior	UserLocal
Description	Event start time
DisplayName	Event start time
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventstarttime
RequiredLevel	ApplicationRequired
Type	DateTime

msdyn_eventtype

Property	Value
Description	Session participant event type
DisplayName	Event type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventtype
RequiredLevel	None
Type	Picklist

msdyn_eventtype Choices/Options

Value	Label
192350000	None
192350001	Hold
192350002	Transcription

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocsessionparticipanteventId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Session Participant Event
IsValidForForm	False

Property	Value
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsessionparticipanteventid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_sessionid

Property	Value
Description	Session associated to the event
DisplayName	Session
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessionid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocsession
Type	Lookup

msdyn_sessionparticipantid

Property	Value
Description	Session participant associated to the event
DisplayName	Session Participant
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessionparticipantid
RequiredLevel	ApplicationRequired
Targets	msdyn_sessionparticipant
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Session Participant Event
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Session Participant Event
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_sessionidName
- msdyn_sessionparticipantidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_sessionidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_sessionidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_sessionparticipantidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_sessionparticipantidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807

Property	Value
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsessionsentiment Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the session level sentiment for customer interactions calculated using AI.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsessionsentiments(*msdyn_ocsessionsentimentid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocsessionsentiments See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocsessionsentiments(*msdyn_ocsessionsentimentid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocsessionsentiments(*msdyn_ocsessionsentimentid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocsessionsentiments See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsessionsentiments(*msdyn_ocsessionsentimentid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsessionsentiments(*msdyn_ocsessionsentimentid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsessionsentiments
DisplayCollectionName	Session Sentiments
DisplayName	Session Sentiment
EntitySetName	msdyn_ocsessionsentiments
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsessionsentiments

Property	Value
LogicalName	msdyn_ocsessionsentiment
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocsessionsentimentid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsessionsentiment

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_ocsessionsentimentId
- msdyn_omnichannelsession
- msdyn_predictedlanguage
- msdyn_sentimentmodelversion
- msdyn_sentimentpulse
- msdyn_sentimenttransition
- msdyn_sentimentzone
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocsessionsentimentId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Session Sentiment
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsessionsentimentid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_omnichannelsession

Property	Value
Description	Session id mapping to the ocsession entity.
DisplayName	Session Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_omnichannelsession
RequiredLevel	ApplicationRequired
Targets	msdyn_ocsession
Type	Lookup

msdyn_predictedlanguage

Property	Value
Description	The language predicted by the AI model
DisplayName	Predicted language
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_predictedlanguage

Property	Value
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_sentimentmodelversion

Property	Value
Description	The version of the model that was used to calculate the sentiment score
DisplayName	Sentiment Model Version
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimentmodelversion
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_sentimentpulse

Property	Value
Description	Sentiment score of the interaction ranging from 0 (very negative) to 100 (very positive).
DisplayName	Sentiment Pulse
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimentpulse
MaxValue	100
MinValue	0
Precision	2
RequiredLevel	ApplicationRequired
Type	Double

msdyn_sentimenttransition

Property	Value
Description	The difference in the sentiment of the end zone of the session and the beginning zone of the session.
DisplayName	Sentiment Transition
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimenttransition
MaxValue	100
MinValue	-100

Property	Value
Precision	2
RequiredLevel	ApplicationRequired
Type	Double

msdyn_sentimentzone

Property	Value
Description	The categorical value generated from "Sentiment Pulse" using specific cut-off points. There are three categories: “Positive”, “Neutral”, “Negative”.
DisplayName	Sentiment Zone
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sentimentzone
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid

Property	Value
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Session Sentiment
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Session Sentiment
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None

Property	Value
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy

- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_omnichannelsessionName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_omnichannelsessionName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_omnichannelsessionname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsimltraining Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Indicates model's training details

Added by: Dynamics 365 UR Intelligent Skill Finder Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsimltrainings(*msdyn_ocsimltrainingid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocsimltrainings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocsimltrainings(*msdyn_ocsimltrainingid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
msdyn_PublishAIModel		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
msdyn_TrainModel		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
msdyn_UpdateModelStatus		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocsimltrainings(*msdyn_ocsimltrainingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocsimltrainings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsimltrainings(*msdyn_ocsimltrainingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsimltrainings(*msdyn_ocsimltrainingid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsimltrainings
DisplayCollectionName	Models training details
DisplayName	Model training details
EntitySetName	msdyn_ocsimltrainings
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsimltrainings
LogicalName	msdyn_ocsimltraining
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocsimltrainingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsimltraining

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_errordetails
- msdyn_mltrainingstatus
- msdyn_name
- msdyn_ocsimltrainingId
- msdyn_ocskillidentmlmodelid
- msdyn_publishaiconfiguration
- msdyn_publishedon
- msdyn_trainaiconfiguration
- msdyn_trainedon
- msdyn_trainingdatacount
- msdyn_UniqueName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_errordetails

Property	Value
Description	Details of error
DisplayName	Error details
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_errordetails
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_mltrainingstatus

Property	Value
Description	Model training status

Property	Value
DisplayName	Status
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_mltrainingstatus
RequiredLevel	None
Type	Picklist

msdyn_mltrainingstatus Options

Value	Label
192350000	Draft
326340000	Publish in progress
326340001	Train config created
326340002	Publish failed
326340003	Publish completed
326340004	Training failed
326340005	Training in progress
326340006	Training completed
326340007	Publish config created
326340008	Loading Data

msdyn_name

Property	Value
Description	The name of the model training detail.
DisplayName	Model training detail name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocsimltrainingId

Property	Value
Description	Unique identifier for model training detail

Property	Value
DisplayName	Model training detail id
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsimltrainingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocskillidentmlmodelid

Property	Value
Description	Skill finder model
DisplayName	Skill finder model
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocskillidentmlmodelid
RequiredLevel	None
Targets	msdyn_ocskillidentmlmodel
Type	Lookup

msdyn_publishaiconfiguration

Property	Value
Description	Reference to AI builder published configuration
DisplayName	Published AI builder configuration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_publishaiconfiguration
RequiredLevel	None
Targets	msdyn_aiconfiguration
Type	Lookup

msdyn_publishedon

Property	Value
DateTimeBehavior	UserLocal
Description	Model published date
DisplayName	Published on
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_publishedon
RequiredLevel	None
Type	DateTime

msdyn_trainaiconfiguration

Property	Value
Description	Reference to AI builder training configuration
DisplayName	Training AI builder configuration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_trainaiconfiguration
RequiredLevel	None
Targets	msdyn_aiconfiguration
Type	Lookup

msdyn_trainedon

Property	Value
DateTimeBehavior	UserLocal
Description	Model training start date
DisplayName	Trained on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_trainedon
RequiredLevel	None
Type	DateTime

msdyn_trainingdatacount

Property	Value
Description	Total number of training records processed
DisplayName	Records processed
Format	None
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_trainingdatacount
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_UniqueName

Property	Value
Description	Unique name for the entity.
DisplayName	Unique name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the ocsimltraining
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the ocsimltraining
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1

Property	Value
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ocskillidentmlmodelidName
- msdyn_publishaiconfigurationName
- msdyn_trainaiconfigurationName
- OverwriteTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.

Property	Value
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ocskillidentmlmodelidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocskillidentmlmodelidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_publishaiconfigurationName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_publishaiconfigurationname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_trainaiconfigurationName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_trainaiconfigurationname
MaxLength	100
RequiredLevel	None
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808

Property	Value
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsitdimportconfig Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Indicates the training data import configuration

Added by: Dynamics 365 UR Intelligent Skill Finder Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsitdimportconfigs(*msdyn_ocsitdimportconfigid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocsitdimportconfigs See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocsitdimportconfigs(*msdyn_ocsitdimportconfigid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
msdyn_InsertTrainingRecords		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocsitdimportconfigs(*msdyn_ocsitdimportconfigid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocsitdimportconfigs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsitdimportconfigs(*msdyn_ocsitdimportconfigid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsitdimportconfigs(*msdyn_ocsitdimportconfigid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsitdimportconfigs
DisplayCollectionName	Training data import configurations
DisplayName	Training data import configuration
EntitySetName	msdyn_ocsitdimportconfigs

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_ocsitdimportconfigs
LogicalName	msdyn_ocsitdimportconfig
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocsitdimportconfigid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsitdimportconfig

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_cdsdataloadconfig
- msdyn_importconfigtype
- msdyn_loadstatus
- msdyn_name
- msdyn_ocsitdimportconfigId
- msdyn_ocskillidentmlmodelid
- msdyn_recordsimported
- msdyn_recordsskipped
- msdyn_totalrecordstoimport
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import sequence version number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_cdsdataloadconfig

Property	Value
Description	Data loading config

Property	Value
DisplayName	Data loading config
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_cdsdataloadconfig
MaxLength	5000
RequiredLevel	None
Type	Memo

msdyn_importconfigtype

Property	Value
Description	Data loading config type
DisplayName	Data loading config type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_importconfigtype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_importconfigtype Options

Value	Label
617690000	Conversation

msdyn_loadstatus

Property	Value
Description	
DisplayName	Load status
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_loadstatus
RequiredLevel	None
Type	Picklist

msdyn_loadstatus Options

Value	Label
192350000	Triggering load
192350001	Loading training data

Value	Label
192350002	Load completed
192350003	Load failed

msdyn_name

Property	Value
Description	The name of the data loading config.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocsitdimportconfigId

Property	Value
Description	Unique identifier for data loading config
DisplayName	Data loading config id
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsitdimportconfigid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocskillidentmlmodelid

Property	Value
Description	Skill finder model
DisplayName	Skill finder model
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocskillidentmlmodelid
RequiredLevel	None
Targets	msdyn_ocskillidentmlmodel
Type	Lookup

msdyn_recordsimported

Property	Value
Description	No of records imported at given point of time from this import config
DisplayName	Records processed
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_recordsimported
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_recordsskipped

Property	Value
Description	No of records skipped because of no or bad training data
DisplayName	Records skipped
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_recordsskipped
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_totalrecordstoimport

Property	Value
Description	Total no of records imported from this import config
DisplayName	Total records to import
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_totalrecordstoimport
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the ocsitdimportconfig
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the ocsitdimportconfig
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None

Property	Value
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ocskillidentmlmodelidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.

Property	Value
DisplayName	Created on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ocskillidentmlmodelidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocskillidentmlmodelidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsitrainingdata Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Indicates individual training record to be used for model training

Added by: Dynamics 365 UR Intelligent Skill Finder Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsitrainingdatas(*msdyn_ocsitrainingdataid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocsitrainingdatas See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocsitrainingdatas(*msdyn_ocsitrainingdataid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocsitrainingdatas(*msdyn_ocsitrainingdataid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocsitrainingdatas See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsitrainingdatas(*msdyn_ocsitrainingdataid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocsitrainingdatas(*msdyn_ocsitrainingdataid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsitrainingdatas
DisplayCollectionName	Training records
DisplayName	Training record
EntitySetName	msdyn_ocsitrainingdatas
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_ocsitrainingdatas
LogicalName	msdyn_ocsitrainingdata
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocsitrainingdataid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsitrainingdata

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_approvedby
- msdyn_approvedon
- msdyn_name
- msdyn_ocsitdimportconfigid
- msdyn_ocsitrainingdataId
- msdyn_ocsitrainingdatastatus
- msdyn_ocskillidentmlmodelid
- msdyn_phrase
- msdyn_skillidscsv
- msdyn_skillscsv
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import sequence version number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_approvedby

Property	Value

Property	Value
Description	Approved by
DisplayName	Approved by
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_approvedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_approvedon

Property	Value
DateTimeBehavior	UserLocal
Description	Approved on
DisplayName	Approved on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_approvedon
RequiredLevel	None
Type	DateTime

msdyn_name

Property	Value
Description	The name of the training record.
DisplayName	Training record name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	2000
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocsitdimportconfigid

Property	Value
Description	Data loading config

Property	Value
DisplayName	Data loading config
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocsitdimportconfigid
RequiredLevel	None
Targets	msdyn_ocsitdimportconfig
Type	Lookup

msdyn_ocsitrainingdataId

Property	Value
Description	Unique identifier for training record
DisplayName	Training record id
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocsitrainingdataid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocsitrainingdatastatus

Property	Value
Description	Approval status
DisplayName	Approval status
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocsitrainingdatastatus
RequiredLevel	None
Type	Picklist

msdyn_ocsitrainingdatastatus Options

Value	Label
326340000	Approved
326340001	Pending
326340002	Needs further investigation

msdyn_ocskillidentmlmodelid

Property	Value

Property	Value
Description	Skill finder model
DisplayName	Skill finder model
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocskillidentmlmodelid
RequiredLevel	None
Targets	msdyn_ocskillidentmlmodel
Type	Lookup

msdyn_phrase

Property	Value
Description	Input data
DisplayName	Input data
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_phrase
MaxLength	5000
RequiredLevel	None
Type	Memo

msdyn_skillidscsv

Property	Value
Description	List of skill IDs
DisplayName	Skill IDs
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_skillidscsv
MaxLength	4000
RequiredLevel	None
Type	Memo

msdyn_skillscsv

Property	Value

Property	Value
Description	Tags
DisplayName	Tags
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_skillscsv
MaxLength	4000
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the ocsitrainingdata
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the ocsitrainingdata
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName

- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_approvedbyName
- msdyn_approvedbyYomiName
- msdyn_ocsitdimportconfigidName
- msdyn_ocskillidentmlmodelidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None

Property	Value
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_approvedbyName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_approvedbyname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_approvedbyYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_approvedbyyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_ocsitdimportconfigidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocsitdimportconfigidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocskillidentmlmodelidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocskillidentmlmodelidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocskillidentmlmodel Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Indicates the OmniChannel Model for the corresponding AI model

Added by: Dynamics 365 UR Intelligent Skill Finder Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocskillidentmlmodels(*msdyn_ocskillidentmlmodelid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocskillidentmlmodels See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocskillidentmlmodels(*msdyn_ocskillidentmlmodelid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
msdyn_CreatePublishAIConfig		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
msdyn_CreatePublishAIModel		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
msdyn_CreateTrainConfig		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
msdyn_TrainAIModel		Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocskillidentmlmodels(*msdyn_ocskillidentmlmodelid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocskillidentmlmodels See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocskillidentmlmodels(*msdyn_ocskillidentmlmodelid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocskillidentmlmodels(*msdyn_ocskillidentmlmodelid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocskillidentmlmodels
DisplayCollectionName	Skill finder models
DisplayName	Skill finder model
EntitySetName	msdyn_ocskillidentmlmodels
IsBPFEntity	False
LogicalCollectionName	msdyn_ocskillidentmlmodels
LogicalName	msdyn_ocskillidentmlmodel
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocskillidentmlmodelid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocskillidentmlmodel

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_aimodelid
- msdyn_name
- msdyn_ocskillidentmlmodelId
- msdyn_ocskillidentmlmodelstatus
- msdyn_ocskillidentmlmodeltrainingstatus
- msdyn_trainingconfiguration
- msdyn_UniqueName
- msdyn_wizzarddata
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_aimodelid

Property	Value
Description	AI model
DisplayName	AI model
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_aimodelid
RequiredLevel	None
Targets	msdyn_aimodel
Type	Lookup

msdyn_name

Property	Value
Description	Model name
DisplayName	Model name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocskillidentmlmodelId

Property	Value
Description	Unique identifier for skill finder model
DisplayName	Skill finder model
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocskillidentmlmodelid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocskillidentmlmodelstatus

Property	Value
Description	Indicates model's status
DisplayName	Model status
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocskillidentmlmodelstatus
RequiredLevel	None
Type	Picklist

msdyn_ocskillidentmlmodelstatus Options

Value	Label
100000000	Draft
100000001	Trained
100000002	Published

msdyn_ocskillidentmlmodeltrainingstatus

Property	Value
Description	Indicates model's recent training status
DisplayName	Training status
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocskillidentmlmodeltrainingstatus
RequiredLevel	None
Type	Picklist

msdyn_ocskillidentmlmodeltrainingstatus Options

Value	Label
100000000	Not trained
100000001	Training in progress

Value	Label
100000002	Training completed
100000003	Training failed
100000004	Publish in progress
100000005	Publish failed
100000006	Publish completed
100000007	Loading data

msdyn_trainingconfiguration

Property	Value
Description	Training configuration
DisplayName	Training configuration
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_trainingconfiguration
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_UniqueName

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

msdyn_wizzarddata

Property	Value
Description	Attribute to map UI data
DisplayName	Data loading config
Format	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_wizzarddata
MaxLength	2000
RequiredLevel	None
Type	Memo

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the ocskillidentmlmodel
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the ocskillidentmlmodel
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.

Property	Value
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_aimodelidName
- OverwriteTime
- OwnerIdName
- OwnerIdYomiName

- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_aimodelidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_aimodelidname
MaxLength	100
RequiredLevel	None
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber

Property	Value
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocsystemmessage Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the system messages sent to the message receiver for various events.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocsystemmessages See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocsystemmessages(*msdyn_ocsystemmessageid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocsystemmessages(*msdyn_ocsystemmessageid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocsystemmessages See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsystemmessages(*msdyn_ocsystemmessageid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocsystemmessages(*msdyn_ocsystemmessageid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocsystemmessages
DisplayCollectionName	System Messages
DisplayName	System Message
EntitySetName	msdyn_ocsystemmessages
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_ocsystemmessages
LogicalName	msdyn_ocsystemmessage
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_ocsystemmessageid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocsystemmessage

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_messagedescription
- msdyn_messagereceiver
- msdyn_messagetext
- msdyn_name
- msdyn_ocsystemmessageId
- msdyn_streamsource
- msdyn_systemmessageeventtype
- msdyn_widgetid
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

msdyn_messagedescription

Property	Value
Description	Description of the message.
DisplayName	Message Description
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_messagedescription
MaxLength	2000
RequiredLevel	ApplicationRequired
Type	Memo

msdyn_messagereceiver

Property	Value
Description	Stores the list of message receivers.
DisplayName	Message Receiver
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_messagereceiver
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_messagereceiver Options

Value	Label
192350000	Agent
192350001	Customer

msdyn_messagetext

Property	Value
Description	Text sent to the message receiver.
DisplayName	Message Text
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_messagetext
MaxLength	2000
RequiredLevel	ApplicationRequired
Type	Memo

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocsystemmessageId

Property	Value
Description	Unique identifier for entity instances
DisplayName	System Message
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	msdyn_ocsystemmessageid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_streamsource

Property	Value
Description	List of all available channels.
DisplayName	Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_streamsource
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_streamsource Options

Value	Label
19241000	Microsoft Teams
192300000	WhatsApp
192310000	LINE
192320000	WeChat
192330000	Facebook
192340000	SMS
192350000	Entity Records
192350001	Twitter
192350002	Custom
192360000	Live chat
192370000	Voice
192380000	Video
192390000	Co-browse
192400000	Screen sharing

msdyn_systemmessageeventtype

Property	Value
Description	Stores the list of event types for system messages.
DisplayName	System Message Event Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_systemmessageeventtype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_systemmessageeventtype Options

Value	Label
192350000	AgentAccepted
192350001	ConsultAccepted
192350002	TransferAccepted
192350003	ConsultInitiated
192350004	ConsultFailed
192350005	TransferInitiated
192350006	TransferFailed
192350007	ConsultRejected
192350008	TransferRejected
192350009	ConsultTimedOut
192350010	TransferTimedOut
192350011	TransferToQueueInitiated
192350012	TransferToQueueFailed
192350013	AgentDisconnected
192350014	AgentEnded
192350015	SessionClosed
192350016	ConsultSessionClosed
192350017	AgentAssignmentReady
192350018	AgentAssignmentFailure
192350019	CustomerEnded
192350020	CustomerDisconnected

Value	Label
192350021	CustomerQueuePosition_LiveChat
192350022	MessageFailedToSendToCustomer
192350023	OutsideOperationHours
192350024	CustomerQueuePosition_Next
192350025	UnsupportedMessageType
192350026	SecondaryChannelRequested
192350027	SecondaryChannelAccepted
192350028	SecondaryChannelDeclined
192350029	MessageSentOutsideConversationWindow
192350030	CustomerAverageWaitTime_Minutes
192350031	CustomerAverageWaitTime_Hours
192350032	CustomerAverageWaitTime_HoursAndMinutes
192350033	SecondaryChannelEnded

msdyn_widgetid

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	Unique identifier for Chat Widget associated with System Message.
DisplayName	Widget
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_widgetid
RequiredLevel	None
Targets	msdyn_livechatconfig
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On

Property	Value
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the System Message
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the System Message
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode

Property	Value
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1

Property	Value
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_widgetidName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_widgetidName

Added by: Omnichannel - Chat Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_widgetidname
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization

Property	Value
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807

Property	Value
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_ocsystemmessage_msdyn_oclocalizationdata

Added by: Omnichannel - Base Patch Solution

Same as msdyn_oclocalizationdata entity msdyn_ocsystemmessage_msdyn_oclocalizationdata Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_oclocalizationdata
ReferencingAttribute	msdyn_systemmessageid
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_ocsystemmessage_msdyn_oclocalizationdata
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_livechatconfig_msdyn_ocsystemmessage

Added by: Omnichannel – Chat Solution

See msdyn_livechatconfig Entity msdyn_livechatconfig_msdyn_ocsystemmessage One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_octag Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Tags for quick categorization

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_octags(*msdyn_octagid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_octags See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_octags(*msdyn_octagid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_octags(*msdyn_octagid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_octags See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_octags(*msdyn_octagid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_octags(*msdyn_octagid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_octags
DisplayCollectionName	tags
DisplayName	Tag
EntitySetName	msdyn_octags
IsBPFEntity	False
LogicalCollectionName	msdyn_octags
LogicalName	msdyn_octag
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_octagid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_octag

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_octagId
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name for the tag
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_octagId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Tag
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_octagid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On

Property	Value
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Tag
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Tag
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None

Property	Value
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None

Property	Value
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-Many Relationships

Relationship details provided where the msdyn_octag entity is the first entity in the relationship. Listed by **SchemaName**.

msdyn_msdyn_personalmessage_msdyn_octag

See msdyn_personalmessage Entity msdyn_msdyn_personalmessage_msdyn_octag Many-To-Many Relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_octeamschannelconfig Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Microsoft Teams accounts for Omnichannel integration

Added by: Omnichannel - Teams Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_octeamschannelconfigs(*msdyn_octeamschannelconfigid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_octeamschannelconfigs See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_octeamschannelconfigs(*msdyn_octeamschannelconfigid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_octeamschannelconfigs(*msdyn_octeamschannelconfigid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_octeamschannelconfigs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_octeamschannelconfigs(*msdyn_octeamschannelconfigid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_octeamschannelconfigs(*msdyn_octeamschannelconfigid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_octeamschannelconfigs
DisplayCollectionName	Microsoft Teams accounts
DisplayName	Microsoft Teams account
EntitySetName	msdyn_octeamschannelconfigs
IsBPFEntity	False
LogicalCollectionName	msdyn_octeamschannelconfigs
LogicalName	msdyn_octeamschannelconfig

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_octeamschannelconfigid
PrimaryNameAttribute	msdyn_teamsappname
SchemaName	msdyn_octeamschannelconfig

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_botid
- msdyn_enablefileattachmentsforagents
- msdyn_enablefileattachmentsforcustomers
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_octeamschannelconfigId
- msdyn_ocwidgetlanguage
- msdyn_PostConversationSurvey
- msdyn_PostConversationSurveyEnable
- msdyn_PostConversationSurveyMessageText
- msdyn_PostConversationSurveyMode
- msdyn_teamsappname
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_botid

Property	Value
Description	Bot ID is of Teams Channel
DisplayName	Bot ID

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_botid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_enablefileattachmentsforagents

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	Option set to enable or disable attachments for agents
DisplayName	Enable file attachments for agents
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforagents
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforagents Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablefileattachmentsforcustomers

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	Option set to enable or disable attachments for customers
DisplayName	Enable file attachments for customers
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforcustomers
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforcustomers Options

Value	Label

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_liveworkstreamid

Property	Value
Description	Work Stream
DisplayName	Work Stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_octeamschannelconfigId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Teams Channel
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_octeamschannelconfigid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocwidgetlanguage

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	The language setting for the Teams account
DisplayName	Teams account language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguage
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_PostConversationSurvey

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	Lookup to Forms Pro survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_PostConversationSurveyEnable

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	To enable or disable post conversation survey
DisplayName	Enable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyenable
RequiredLevel	None
Type	Boolean

msdyn_PostConversationSurveyEnable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyMessageText

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymessagetext
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyMode

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	Mode of the survey to be sent
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyMode Options

Value	Label
192350000	Insert survey in conversation
192350001	Send survey link to conversation

msdyn_teamsappname

Property	Value
Description	Teams App Name or Teams Channel
DisplayName	Teams App Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_teamsappname
MaxLength	100
RequiredLevel	ApplicationRequired

Property	Value
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Teams Channel
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Teams Channel
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None

Property	Value
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- msdyn_ocwidgetlanguageName
- msdyn_PostConversationSurveyName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwidgetlanguageName

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguagename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyName

Added by: Omnichannel - Teams Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyname
MaxLength	450
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_octeamschannelconfig_msdyn_ocprovisioningstate_octeamschannelconfigid
- msdyn_octeamschannelconfig_msdyn_ocbotchannelregistration_msdyn_octeamschannelconfigid

msdyn_octeamschannelconfig_msdyn_ocprovisioningstate_octeamschannelconfigid

Same as msdyn_ocprovisioningstate entity, msdyn_octeamschannelconfig_msdyn_ocprovisioningstate_octeamschannelconfigid, Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocprovisioningstate
ReferencingAttribute	msdyn_octeamschannelconfigid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_octeamschannelconfig_msdyn_ocprovisioningstate_octeamschannelconfigid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_octeamschannelconfig_msdyn_ocbotchannelregistration_msdyn_octeamschannelconfigic

Same as msdyn_ocbotchannelregistration entity, msdyn_octeamschannelconfig_msdyn_ocbotchannelregistration_msdyn_octeamschannelconfigid, Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocbotchannelregistration
ReferencingAttribute	msdyn_octeamschannelconfigid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_octeamschannelconfig_msdyn_ocbotchannelregistration_msdyn_octeamschannelconfigid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_oclanguage_msdyn_octeamschannelconfig_teamsaccountlanguage

Added by: Omnichannel - Base Patch Solution

See msdyn_oclanguage Entity msdyn_msdyn_oclanguage_msdyn_octeamschannelconfig_teamsaccountlanguage One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocvoice Entity Reference

Article • 11/08/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - Telephony Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoices(*msdyn_ocvoiceid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocvoices See Create	CreateRequest or Create
CreateMultiple		Microsoft.Xrm.Sdk.Messages.CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocvoices(*msdyn_ocvoiceid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocvoices(*msdyn_ocvoiceid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocvoices See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoices(*msdyn_ocvoiceid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoices(*msdyn_ocvoiceid*) See Update	UpdateRequest or Update
UpdateMultiple		Microsoft.Xrm.Sdk.Messages.UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_ocvoices
DisplayCollectionName	Voices

Property	Value
DisplayName	Voice
EntitySetName	msdyn_ocvoices
IsBPFEntity	False
LogicalCollectionName	msdyn_ocvoices
LogicalName	msdyn_ocvoice
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocvoiceid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocvoice

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_languageid
- msdyn_name
- msdyn_ocvoiceId
- msdyn_pitch
- msdyn_speakingspeed
- msdyn_voicename
- msdyn_voicestyle
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

msdyn_languageid

Property	Value
Description	Language
DisplayName	Language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_languageid
RequiredLevel	None
Targets	msdyn_oclanguage
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocvoiceId

Property	Value
Description	Unique identifier for entity instances
DisplayName	voice
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocvoiceid

Property	Value
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_pitch

Property	Value
Description	
DisplayName	pitch
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_pitch
MaxValue	50
MinValue	-50
RequiredLevel	None
Type	Integer

msdyn_speakingspeed

Property	Value
Description	
DisplayName	speaking speed
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_speakingspeed
MaxValue	200
MinValue	-100
RequiredLevel	None
Type	Integer

msdyn_voicename

Property	Value
Description	
DisplayName	voice name
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_voicename
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_voicestyle

Property	Value
Description	
DisplayName	voice style
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_voicestyle
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the voice
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the voice
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode

Property	Value
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_languageidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon

Property	Value
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_languageidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	msdyn_languageidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_ocvoice_msdyn_ocvoicechannellanguagesetting_ocvoiceid

Same as msdyn_ocvoicechannellanguagesetting table msdyn_msdyn_ocvoice_msdyn_ocvoicechannellanguagesetting_ocvoiceid Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocvoicechannellanguagesetting
ReferencingAttribute	msdyn_ocvoiceid
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_ocvoice_msdyn_ocvoicechannellanguagesetting_ocvoiceid

Property	Value
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

About the Entity Reference
Web API Reference

msdyn_ocvoicechannellanguagesetting Entity Reference

Article • 11/08/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores information about the voice channel language settings

Added by: Omnichannel - Telephony Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoicechannellanguagesettings(*msdyn_ocvoicechannellanguagesettingid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocvoicechannellanguagesettings See Create	CreateRequest or Create
CreateMultiple	Microsoft.Xrm.Sdk.Messages.CreateMultipleRequest	
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocvoicechannellanguagesettings(*msdyn_ocvoicechannellanguagesettingid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionReq
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocvoicechannellanguagesettings(*msdyn_ocvoicechannellanguagesettingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocvoicechannellanguagesettings See Query Data	RetrieveMultipleRequest RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessR
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipals/
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoicechannellanguagesettings(*msdyn_ocvoicechannellanguagesettingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoicechannellanguagesettings(*msdyn_ocvoicechannellanguagesettingid*) See Update	UpdateRequest or Update
UpdateMultiple		Microsoft.Xrm.Sdk.Messa

Properties

Property	Value
CollectionSchemaName	msdyn_ocvoicechannellanguagesettings
DisplayCollectionName	Voice Channel Language Settings
DisplayName	Voice Channel Language Setting
EntitySetName	msdyn_ocvoicechannellanguagesettings
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_ocvoicechannellanguagesettings
LogicalName	msdyn_ocvoicechannellanguagesetting
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocvoicechannellanguagesettingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocvoicechannellanguagesetting

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_holdmusicid
- msdyn_isprimary
- msdyn_languageid
- msdyn_name
- msdyn_ocvoicechannellanguagesettingId
- msdyn_ocvoicechannelsettingid
- msdyn_ocvoiceid
- msdyn_surveybotsystemuserid
- msdyn_waitmusicid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_holdmusicid

Property	Value
Description	
DisplayName	Hold music

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_holdmusicid
RequiredLevel	None
Targets	msdyn_ocphonemusic
Type	Lookup

msdyn_isprimary

Property	Value
Description	Indicates whether this is the primary language or not.
DisplayName	Is Primary
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isprimary
RequiredLevel	None
Type	Boolean

msdyn_isprimary Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_languageid

Property	Value
Description	
DisplayName	Language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_languageid
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocvoicechannellanguagesettingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Voice Channel Language Setting
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocvoicechannellanguagesettingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocvoicechannelsettingid

Property	Value
Description	
DisplayName	voice channel setting
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocvoicechannelsettingid
RequiredLevel	None
Targets	msdyn_ocvoicechannelsetting
Type	Lookup

msdyn_ocvoiceid

Property	Value
Description	
DisplayName	Voice
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocvoiceid
RequiredLevel	None
Targets	msdyn_ocvoice
Type	Lookup

msdyn_surveybotsystemuserid

Property	Value
Description	
DisplayName	survey bot systemuser
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_surveybotsystemuserid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_waitmusicid

Property	Value
Description	
DisplayName	Wait music
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_waitmusicid
RequiredLevel	None
Targets	msdyn_ocphonemusic
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Voice Channel Language Setting
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Voice Channel Language Setting
DisplayName	Status Reason
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName

- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_holdmusicidName
- msdyn_languageidName
- msdyn_ocvoicechannelsettingidName
- msdyn_ocvoiceidName
- msdyn_surveybotsystemuseridName
- msdyn_surveybotsystemuseridYomiName
- msdyn_waitmusicidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_holdmusicidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_holdmusicidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_languageidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_languageidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocvoicechannelsettingidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	msdyn_ocvoicechannelsettingidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocvoiceidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocvoiceidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_surveybotsystemuseridName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_surveybotsystemuseridname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_surveybotsystemuseridYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_surveybotsystemuseridyominame

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

msdyn_waitmusicidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_waitmusicidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related table. Listed by **SchemaName**.

msdyn_msdyn_ocvoice_msdyn_ocvoicechannellanguagesetting_ocvoiceid

See msdyn_ocvoice Table msdyn_msdyn_ocvoice_msdyn_ocvoicechannellanguagesetting_ocvoiceid One-To-Many relationship.

See also

About the Entity Reference
Web API Reference

msdyn_ocvoicechannelsetting Entity Reference

Article • 12/09/2022

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - Telephony Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoicechannelsettings(*msdyn_ocvoicechannelsettingid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocvoicechannelsettings See Create	CreateRequest or Create
CreateMultiple		`Microsoft.Xrm.Sdk.Messages.Cre`
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocvoicechannelsettings(*msdyn_ocvoicechannelsettingid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
msdyn_TelephonyVoiceChannelProvisionAction	Microsoft.Dynamics.CRM.msdyn_TelephonyVoiceChannelProvisionAction	Type generated by CrmSvcUtil.e Microsoft.Xrm.Sdk.Organization required parameters for the mes
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocvoicechannelsettings(*msdyn_ocvoicechannelsettingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocvoicechannelsettings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoicechannelsettings(*msdyn_ocvoicechannelsettingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocvoicechannelsettings(*msdyn_ocvoicechannelsettingid*) See Update	UpdateRequest or Update
UpdateMultiple		`Microsoft.Xrm.Sdk.Messages.Upd`

Properties

Property	Value
CollectionSchemaName	msdyn_ocvoicechannelsettings
DisplayCollectionName	Voice Channel Settings
DisplayName	Voice Channel Setting
EntitySetName	msdyn_ocvoicechannelsettings

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_ocvoicechannelsettings
LogicalName	msdyn_ocvoicechannelsetting
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocvoicechannelsettingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocvoicechannelsetting

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_agentexternalparticipantcontrolenabled
- msdyn_agentexternalteamsparticipantcontrolenabled
- msdyn_agentrecordingcontrolsenabled
- msdyn_agenttranscriptioncontrolsenabled
- msdyn_announceaveragewaittime
- msdyn_announcepositioninqueue
- msdyn_inboundurl
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_ocvoicechannelsettingId
- msdyn_operatinghoursid
- msdyn_phonenumberid
- msdyn_recordingenabled
- msdyn_recordingmode
- msdyn_transcriptionenabled
- msdyn_transcriptionmode
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None

Property	Value
Type	Integer

msdyn_agentexternalparticipantcontrolenabled

Property	Value
Description	Enable agent control to add an external participant
DisplayName	Enable agent control to add an external participant
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentexternalparticipantcontrolenabled
RequiredLevel	None
Type	Boolean

msdyn_agentexternalparticipantcontrolenabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_agentexternalteamsparticipantcontrolenabled

Property	Value
Description	Enable agent control to add an external participant on Teams
DisplayName	Enable agent control to add an external participant on Teams
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentexternalteamsparticipantcontrolenabled
RequiredLevel	None
Type	Boolean

msdyn_agentexternalteamsparticipantcontrolenabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_agentrecordingcontrolsenabled

Property	Value
Description	Enable agent control of the recording
DisplayName	Enable agent control of the recording
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_agentrecordingcontrolsenabled
RequiredLevel	None
Type	Boolean

msdyn_agentrecordingcontrolsenabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_agenttranscriptioncontrolsenabled

Property	Value
Description	Enable agent control of the transcription
DisplayName	Enable agent control of the transcription
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agenttranscriptioncontrolsenabled
RequiredLevel	None
Type	Boolean

msdyn_agenttranscriptioncontrolsenabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_announceaveragewaittime

Property	Value
Description	Announce the average wait time of the customer in queue
DisplayName	Announce average wait time
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_announceaveragewaittime
RequiredLevel	None
Type	Boolean

msdyn_announceaveragewaittime Choices/Options

Value	Label

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_announcepositioninqueue

Property	Value
Description	Announce the position of the customer in queue
DisplayName	Announce position in queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_announcepositioninqueue
RequiredLevel	None
Type	Boolean

msdyn_announcepositioninqueue Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_inboundurl

Property	Value
Description	Inbound URL
DisplayName	Inbound URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_inboundurl
MaxLength	500
RequiredLevel	None
Type	String

msdyn_liveworkstreamid

Property	Value
Description	Work Stream
DisplayName	Work Stream
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_liveworkstreamid
RequiredLevel	None
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocvoicechannelsettingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Voice Channel Setting
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocvoicechannelsettingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_operatinghoursid

Property	Value
Description	Operating Hours
DisplayName	Operating Hours
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_operatinghoursid
RequiredLevel	None
Targets	msdyn_operatinghour
Type	Lookup

msdyn_phonenumberid

Property	Value
Description	Phone Number
DisplayName	Phone Number
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_phonenumberid
RequiredLevel	None
Targets	msdyn_ocphonenumber
Type	Lookup

msdyn_recordingenabled

Property	Value
Description	Recording Enabled
DisplayName	Recording Enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_recordingenabled
RequiredLevel	None
Type	Boolean

msdyn_recordingenabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_recordingmode

Property	Value
Description	Recording mode
DisplayName	Recording mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_recordingmode
RequiredLevel	None
Type	MultiSelectPicklist

msdyn_recordingmode Choices/Options

Value	Label	Description
192351000	None	Feature is disabled

Value	Label	Description
192351001	Manual	Feature is enabled/disabled manually
192351002	Automatic	Feature enable and disable is automatically managed

msdyn_transcriptionenabled

Property	Value
Description	Transcription Enabled
DisplayName	Transcription Enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_transcriptionenabled
RequiredLevel	None
Type	Boolean

msdyn_transcriptionenabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_transcriptionmode

Property	Value
Description	Transcription mode
DisplayName	Transcription mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_transcriptionmode
RequiredLevel	None
Type	MultiSelectPicklist

msdyn_transcriptionmode Choices/Options

Value	Label	Description
192351000	None	Feature is disabled
192351001	Manual	Feature is enabled/disabled manually
192351002	Automatic	Feature enable and disable is automatically managed

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.

Property	Value
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Voice Channel Setting
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Voice Channel Setting
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- msdyn_operatinghoursidName
- msdyn_phonenumberidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_operatinghoursidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	msdyn_operatinghoursidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_phonenumberidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_phonenumberidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

About the Entity Reference
Web API Reference

msdyn_ocwechatchannelconfig Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

WeChat accounts for Omnichannel integration

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocwechatchannelconfigs(*msdyn_ocwechatchannelconfigid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocwechatchannelconfigs See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocwechatchannelconfigs(*msdyn_ocwechatchannelconfigid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocwechatchannelconfigs(*msdyn_ocwechatchannelconfigid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocwechatchannelconfigs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequ
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocwechatchannelconfigs(*msdyn_ocwechatchannelconfigid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocwechatchannelconfigs(*msdyn_ocwechatchannelconfigid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_ocwechatchannelconfigs
DisplayCollectionName	WeChat accounts
DisplayName	WeChat account
EntitySetName	msdyn_ocwechatchannelconfigs
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_ocwechatchannelconfigs
LogicalName	msdyn_ocwechatchannelconfig
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocwechatchannelconfigid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocwechatchannelconfig

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_applicationid
- msdyn_applicationsecret
- msdyn_callbackurl
- msdyn_enablefileattachmentsforagents
- msdyn_enablefileattachmentsforcustomers
- msdyn_encodingaeskey
- msdyn_ipaddresses
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_ocwechatchannelconfigId
- msdyn_ocwidgetlanguage
- msdyn_PostConversationSurvey
- msdyn_PostConversationSurveyBotSurvey
- msdyn_PostConversationSurveyBotSurveyMessageText
- msdyn_PostConversationSurveyBotSurveyMode
- msdyn_PostConversationSurveyEnable
- msdyn_PostConversationSurveyMessageText
- msdyn_PostConversationSurveyMode
- msdyn_PostConversationSurveySeparateBotSurvey
- msdyn_secureapplicationsecret
- msdyn_secureencodingaeskey
- msdyn_securetoken
- msdyn_serviceaccount
- msdyn_token
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_applicationid

Property	Value
Description	Application ID of WeChat Channel
DisplayName	Developer ID (AppID)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_applicationid
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_applicationsecret

Property	Value
Description	Application Secret of WeChat Channel
DisplayName	Developer password (AppSecret)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_applicationsecret
MaxLength	225
RequiredLevel	ApplicationRequired
Type	String

msdyn_callbackurl

Property	Value
Description	Callback URL of WeChat Channel
DisplayName	Server address (URL)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_callbackurl
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_enablefileattachmentsforagents

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Option set to enable or disable attachments for agents
DisplayName	Enable file attachments for agents
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforagents
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforagents Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablefileattachmentsforcustomers

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Option set to enable or disable attachments for customers
DisplayName	Enable file attachments for customers
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforcustomers
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforcustomers Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_encodingaeskey

Property	Value
Description	Message encryption key (EncodingAESKey) for WeChat
DisplayName	Message encryption key (EncodingAESKey)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_encodingaeskey
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_ipaddresses

Property	Value
Description	IP Address of WeChat Channel
DisplayName	IP Address
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ipaddresses
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_liveworkstreamid

Property	Value
Description	Work Stream of WeChat Channel
DisplayName	Work Stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocwechatchannelconfigId

Property	Value
Description	WeChat Channel identifies WeChat Channel
DisplayName	WeChat Channel identity
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocwechatchannelconfigid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocwidgetlanguage

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	The language setting for the WeChat account
DisplayName	WeChat account language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguage
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_PostConversationSurvey

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Lookup to Dynamics 365 Customer Voice survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurvey

Property	Value
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_PostConversationSurveyBotSurvey

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Enable or disable bot survey
DisplayName	Bot Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveybotsurvey
RequiredLevel	None
Type	Boolean

msdyn_PostConversationSurveyBotSurvey Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyBotSurveyMessageText

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveybotsurveymessagetext
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyBotSurveyMode

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Mode of the survey to be sent

Property	Value
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveybotsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyBotSurveyMode Choices/Options

Value	Label
192350000	Insert survey in conversation
192350001	Send survey link to conversation

msdyn_PostConversationSurveyEnable

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	To enable or disable post conversation survey
DisplayName	Enable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyenable
RequiredLevel	None
Type	Boolean

msdyn_PostConversationSurveyEnable Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyMessageText

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymessagetext

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyMode

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Mode of the survey to be sent
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyMode Choices/Options

Value	Label
192350000	Insert survey in conversation
192350001	Send survey link to conversation

msdyn_PostConversationSurveySeparateBotSurvey

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Lookup to Dynamics 365 Customer Voice survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyseparatebotsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_secureapplicationsecret

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Secure Application Secret of WeChat Channel
DisplayName	Secure Developer password (AppSecret)
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_secureapplicationsecret
MaxLength	225
RequiredLevel	ApplicationRequired
Type	String

msdyn_secureencodingaeskey

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Secure Message encryption key (EncodingAESKey) for WeChat
DisplayName	Secure Message encryption key (EncodingAESKey)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_secureencodingaeskey
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_securetoken

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Secure Token of WeChat Channel
DisplayName	Secure Token
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_securetoken
MaxLength	1000
RequiredLevel	ApplicationRequired
Type	String

msdyn_serviceaccount

Property	Value
Description	Original ID of WeChat Channel
DisplayName	Original ID

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_serviceaccount
MaxLength	255
RequiredLevel	ApplicationRequired
Type	String

msdyn_token

Property	Value
Description	Token of WeChat Channel
DisplayName	Token
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_token
MaxLength	1000
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the WeChat Channel
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the WeChat Channel
DisplayName	Status Reason
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName

- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- msdyn_ocwidgetlanguageName
- msdyn_PostConversationSurveyName
- msdyn_PostConversationSurveySeparateBotSurveyName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwidgetlanguageName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguagename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyname
MaxLength	450
RequiredLevel	None
Type	String

msdyn_PostConversationSurveySeparateBotSurveyName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyseparatebotsurveyname
MaxLength	450
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocwhatsappchannelaccount Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

WhatsApp accounts for Omnichannel integration

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_ocwhatsappchannelaccounts(*msdyn_ocwhatsappchannelaccountid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_ocwhatsappchannelaccounts See Create	CreateRequest or Create
CreateMultiple		CreateMultipleRequest
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_ocwhatsappchannelaccounts(*msdyn_ocwhatsappchannelaccountid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_ocwhatsappchannelaccounts(*msdyn_ocwhatsappchannelaccountid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_ocwhatsappchannelaccounts See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_ocwhatsappchannelaccounts(*msdyn_ocwhatsappchannelaccountid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_ocwhatsappchannelaccounts(*msdyn_ocwhatsappchannelaccountid*) See Update	UpdateRequest or Update
UpdateMultiple		UpdateMultipleRequest

Properties

Property	Value
CollectionSchemaName	msdyn_ocwhatsappchannelaccounts
DisplayCollectionName	WhatsApp accounts
DisplayName	WhatsApp account
EntitySetName	msdyn_ocwhatsappchannelaccounts
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_ocwhatsappchannelaccounts
LogicalName	msdyn_ocwhatsappchannelaccount
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocwhatsappchannelaccountid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocwhatsappchannelaccount

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_authenticationtoken
- msdyn_name
- msdyn_ocwhatsappchannelaccountId
- msdyn_provideraccountid
- msdyn_secureauthenticationtoken
- msdyn_TwilioInboundURL
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_authenticationtoken

Property	Value
Description	Authentication token of WhatsApp account.
DisplayName	Auth token
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_authenticationtoken
MaxLength	255
RequiredLevel	ApplicationRequired
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocwhatsappchannelaccountId

Property	Value
Description	Unique identifier for entity instances
DisplayName	WhatsApp Account
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocwhatsappchannelaccountid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_provideraccountid

Property	Value
Description	The account ID of 3rd party provider
DisplayName	Account SID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_provideraccountid

Property	Value
MaxLength	255
RequiredLevel	ApplicationRequired
Type	String

msdyn_secureauthenticationtoken

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	OC Authentication token of WhatsApp account.
DisplayName	OC Auth token
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_secureauthenticationtoken
MaxLength	255
RequiredLevel	ApplicationRequired
Type	String

msdyn_TwilioInboundURL

Property	Value
Description	URL for Twilio inbound request
DisplayName	Twilio inbound URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_twilioinboundurl
MaxLength	500
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the WhatsApp Channel Account
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the WhatsApp Channel Account
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.

Property	Value
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_ocwhatsappchannelnumber Entity Reference

Article • 05/26/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

WhatsApp numbers for Omnichannel integration

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_ocwhatsappchannelnumbers(*msdyn_ocwhatsappchannelnumberid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_ocwhatsappchannelnumbers See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_ocwhatsappchannelnumbers(*msdyn_ocwhatsappchannelnumberid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_ocwhatsappchannelnumbers(*msdyn_ocwhatsappchannelnumberid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_ocwhatsappchannelnumbers See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_ocwhatsappchannelnumbers(*msdyn_ocwhatsappchannelnumberid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_ocwhatsappchannelnumbers(*msdyn_ocwhatsappchannelnumberid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_ocwhatsappchannelnumbers
DisplayCollectionName	WhatsApp numbers
DisplayName	WhatsApp number
EntitySetName	msdyn_ocwhatsappchannelnumbers
IsBPFEntity	False
LogicalCollectionName	msdyn_ocwhatsappchannelnumbers
LogicalName	msdyn_ocwhatsappchannelnumber

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_ocwhatsappchannelnumberid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_ocwhatsappchannelnumber

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_enablefileattachmentsforagents
- msdyn_enablefileattachmentsforcustomers
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_ocwhatsappaccountid
- msdyn_ocwhatsappchannelnumberId
- msdyn_ocwidgetlanguage
- msdyn_organizationphonenumber
- msdyn_PostConversationSurvey
- msdyn_PostConversationSurveyEnable
- msdyn_PostConversationSurveyMessageText
- msdyn_PostConversationSurveyMode
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_enablefileattachmentsforagents

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Enable file attachments for agents

Property	Value
DisplayName	Enable file attachments for agents
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforagents
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforagents Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablefileattachmentsforcustomers

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Enable file attachments for customers
DisplayName	Enable file attachments for customers
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablefileattachmentsforcustomers
RequiredLevel	None
Type	Boolean

msdyn_enablefileattachmentsforcustomers Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_liveworkstreamid

Property	Value
Description	Work stream of WhatsApp number
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream

Property	Value
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ocwhatsappaccountid

Property	Value
Description	Identity of associated WhatsApp account
DisplayName	WhatsApp account
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwhatsappaccountid
RequiredLevel	ApplicationRequired
Targets	msdyn_ocwhatsappchannelaccount
Type	Lookup

msdyn_ocwhatsappchannelnumberId

Property	Value
Description	Unique identifier for WhatsApp entity instances
DisplayName	WhatsApp number
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_ocwhatsappchannelnumberid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ocwidgetlanguage

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	The language setting for the WhatsApp number
DisplayName	WhatsApp number language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguage
RequiredLevel	ApplicationRequired
Targets	msdyn_oclanguage
Type	Lookup

msdyn_organizationphonenumber

Property	Value
Description	Phone number for a WhatsApp account
DisplayName	Phone number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_organizationphonenumber
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_PostConversationSurvey

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Lookup to Forms Pro survey field
DisplayName	Survey
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurvey
RequiredLevel	None
Targets	msfp_survey
Type	Lookup

msdyn_PostConversationSurveyEnable

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	To enable or disable post conversation survey
DisplayName	Enable

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyenable
RequiredLevel	None
Type	Boolean

msdyn_PostConversationSurveyEnable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_PostConversationSurveyMessageText

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Prefix text for survey link message that will be sent to the user.
DisplayName	Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymessagetext
MaxLength	200
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyMode

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	Mode of the survey to be sent
DisplayName	Survey Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_postconversationsurveymode
RequiredLevel	None
Type	Picklist

msdyn_PostConversationSurveyMode Options

Value	Label

Value	Label
192350000	Insert survey in conversation
192350001	Send survey link to conversation

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the WhatsApp number
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the WhatsApp number
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None

Property	Value
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- msdyn_ocwhatsappaccountidName
- msdyn_ocwidgetlanguageName
- msdyn_PostConversationSurveyName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.

Property	Value
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwhatsappaccountidName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwhatsappaccountidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ocwidgetlanguageName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocwidgetlanguagename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_PostConversationSurveyName

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_postconversationsurveyname
MaxLength	450
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_ocwhatsappchannelaccount_msdyn_ocwhatsappchannelnumber_ocwhatsappaccountid
- msdyn_msdyn_oclanguage_msdyn_ocwhatsappchannelnumber_whatsappnumberlanguage

msdyn_ocwhatsappchannelaccount_msdyn_ocwhatsappchannelnumber_ocwhatsappaccountid

See msdyn_ocwhatsappchannelaccount Entity
msdyn_ocwhatsappchannelaccount_msdyn_ocwhatsappchannelnumber_ocwhatsappaccountid One-To-Many relationship.

msdyn_msdyn_oclanguage_msdyn_ocwhatsappchannelnumber_whatsappnumberlanguage

Added by: Omnichannel - Base Patch Solution

See msdyn_oclanguage Entity msdyn_msdyn_oclanguage_msdyn_ocwhatsappchannelnumber_whatsappnumberlanguage One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_omnichannelconfiguration table/entity reference

Article • 03/17/2023

> ⓘ Note
>
> Unsure about table vs. entity? See **Developers: Understand terminology in Microsoft Dataverse**. Configuration for Omnichannel

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_omnichannelconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_omnichannelconfigurations(*msdyn_omnichannelconfigurationid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_omnichannelconfigurations(*msdyn_omnichannelconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_omnichannelconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_omnichannelconfigurations(*msdyn_omnichannelconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_omnichannelconfigurations(*msdyn_omnichannelconfigurationid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_omnichannelconfigurations
DisplayCollectionName	Omnichannel Configurations
DisplayName	Omnichannel Configuration
EntitySetName	msdyn_omnichannelconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_omnichannelconfigurations
LogicalName	msdyn_omnichannelconfiguration
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_omnichannelconfigurationid
PrimaryNameAttribute	msdyn_name

Property	Value
SchemaName	msdyn_omnichannelconfiguration

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_defaultAgentInputLanguage
- msdyn_enable_advance_entity_routing
- msdyn_enable_missed_notifications
- msdyn_enable_supervisor_assign
- msdyn_enable_supervisor_monitor
- msdyn_enable_unified_routing_diagnostic
- msdyn_enable_visitorjourney
- msdyn_EnableRealTimeTranslation
- msdyn_enablesoundnotifications
- msdyn_inactive_presence_lookup
- msdyn_isdefaultpersonamapped
- msdyn_ispersonalizationofsoundenabled
- msdyn_isPersonalMessagesEnabled
- msdyn_ispersonasecurityrolemappingenabled
- msdyn_IsSkillBasedRoutingEnabled
- msdyn_IsUpdateSkillsEnabled
- msdyn_maskforagent
- msdyn_maskforcustomer
- msdyn_name
- msdyn_omnichannelconfigurationId
- msdyn_SoundFormControl
- msdyn_translationwebresourceurl
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

msdyn_defaultAgentInputLanguage

Property	Value
Description	Default language in which customer's messages are translated for an org
DisplayName	Default input language
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_defaultagentinputlanguage
RequiredLevel	None
Type	Picklist

msdyn_defaultAgentInputLanguage Choices/Options

Value	Label
1025	Arabic - Saudi Arabia
1026	Bulgarian - Bulgaria
1027	Catalan - Spain
1029	Czech - Czech Republic
1030	Danish - Denmark
1031	German - Germany
1032	Greek - Greece
1033	English - United States
1035	Finnish - Finland
1036	French - France
1037	Hebrew - Israel
1038	Hungarian - Hungary
1040	Italian - Italy
1041	Japanese - Japan
1042	Korean - Korea
1043	Dutch - Netherlands
1044	Norwegian Bokmal - Norway
1045	Polish - Poland
1046	Portuguese - Brazil
1048	Romanian - Romania

Value	Label
1049	Russian - Russia
1050	Croatian - Croatia
1051	Slovak - Slovakia
1053	Swedish - Sweden
1054	Thai - Thailand
1055	Turkish - Türkiye
1057	Indonesian - Indonesia
1058	Ukrainian - Ukraine
1060	Slovenian - Slovenia
1061	Estonian - Estonia
1062	Latvian - Latvia
1063	Lithuanian - Lithuania
1066	Vietnamese - Vietnam
1069	Basque - Spain
1081	Hindi - India
1086	Malay - Malaysia
1087	Kazakh - Kazakhstan
1110	Galician - Spain
2052	Chinese - China
2070	Portuguese - Portugal
2074	Serbian (Latin) - Serbia
3076	Chinese - Hong Kong SAR
3082	Spanish - Spain
3098	Serbian (Cyrillic) - Serbia

msdyn_enable_advance_entity_routing

Property	Value
Description	Setting to change advance entity routing for the org.
DisplayName	Enable advance entity routing
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enable_advance_entity_routing
RequiredLevel	None
Type	Boolean

msdyn_enable_advance_entity_routing Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enable_missed_notifications

Property	Value
Description	Setting to change agent status when a notification has been missed.
DisplayName	Enable missed notifications setting
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enable_missed_notifications
RequiredLevel	None
Type	Boolean

msdyn_enable_missed_notifications Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enable_supervisor_assign

Property	Value
Description	Enables supervisor assign feature for the org
DisplayName	Enable supervisor assign
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enable_supervisor_assign
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enable_supervisor_assign Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enable_supervisor_monitor

Property	Value
Description	Enables supervisor monitor feature for the org
DisplayName	Enable supervisor monitor
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enable_supervisor_monitor
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enable_supervisor_monitor Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_enable_unified_routing_diagnostic

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Setting to change unified routing diagnostic for the org.
DisplayName	Enable unified routing diagnostic
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enable_unified_routing_diagnostic
RequiredLevel	None
Type	Boolean

msdyn_enable_unified_routing_diagnostic Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enable_visitorjourney

Property	Value
Description	Enables self service feature for the org

Property	Value
DisplayName	Enable self service
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enable_visitorjourney
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enable_visitorjourney Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_EnableRealTimeTranslation

Property	Value
Description	Enable real time translation feature for the org
DisplayName	Enable Real Time Translation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablerealtimetranslation
RequiredLevel	None
Type	Boolean

msdyn_EnableRealTimeTranslation Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enablesoundnotifications

Property	Value
Description	Enable sound notifications feature
DisplayName	Enable sound notifications
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_enablesoundnotifications
RequiredLevel	None
Type	Boolean

msdyn_enablesoundnotifications Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_inactive_presence_lookup

Property	Value
Description	Lookup to display inactive presence settings.
DisplayName	Inactive Presence
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_inactive_presence_lookup
RequiredLevel	None
Targets	msdyn_presence
Type	Lookup

msdyn_isdefaultpersonamapped

Property	Value
Description	
DisplayName	isdefaultpersonamapped
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isdefaultpersonamapped
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_isdefaultpersonamapped Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_ispersonalizationofsoundenabled

Property	Value
Description	Allow agents to create personal sound settings
DisplayName	Allow agents to create personal sound settings
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ispersonalizationofsoundenabled
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_ispersonalizationofsoundenabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_isPersonalMessagesEnabled

Property	Value
Description	Enable personal messages feature for the org
DisplayName	Enable personal messages
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ispersonalmessagesenabled
RequiredLevel	None
Type	Boolean

msdyn_isPersonalMessagesEnabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_ispersonasecurityrolemappingenabled

Property	Value

Property	Value
Description	
DisplayName	ispersonasecurityrolemappingenabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ispersonasecurityrolemappingenabled
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_ispersonasecurityrolemappingenabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_IsSkillBasedRoutingEnabled

Added by: Omnichannel - Skill Based Routing Solution

Property	Value
Description	Enable Skill Based Routing for Agents & Supervisors
DisplayName	Enable Skill Based Routing
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isskillbasedroutingenabled
RequiredLevel	None
Type	Boolean

msdyn_IsSkillBasedRoutingEnabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_IsUpdateSkillsEnabled

Added by: Omnichannel - SBR Patch Solution

Property	Value
Description	This will enable agents to view and update skills for a conversation.

Property	Value
DisplayName	Enable update skill control
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isupdateskillsenabled
RequiredLevel	None
Type	Boolean

msdyn_IsUpdateSkillsEnabled Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_maskforagent

Property	Value
Description	Mask agent data
DisplayName	Mask for agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_maskforagent
RequiredLevel	None
Type	Boolean

msdyn_maskforagent Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_maskforcustomer

Property	Value
Description	Mask customer data
DisplayName	Mask for customer
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_maskforcustomer
RequiredLevel	None
Type	Boolean

msdyn_maskforcustomer Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_omnichannelconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Omnichannel Configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_omnichannelconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_SoundFormControl

Property	Value
Description	Field to host sound form control
DisplayName	Sound Form Control
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_soundformcontrol
MaxLength	100
RequiredLevel	None
Type	String

msdyn_translationwebresourceurl

Property	Value
Description	Webresource URL used for real time translation of the messages
DisplayName	Web resource URL
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_translationwebresourceurl
MaxLength	2000
RequiredLevel	None
Type	Memo

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None

Property	Value
Type	DateTime

statecode

Property	Value
Description	Status of the Omnichannel Configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Omnichannel Configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName

- msdyn_inactive_presence_lookupName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_inactive_presence_lookupName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_inactive_presence_lookupname
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Web API Reference

msdyn_omnichannelpersonalization Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores personalization information of Omnichannel Agent/Supervisor dashboards

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_omnichannelpersonalizations(*msdyn_omnichannelpersonalizationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_omnichannelpersonalizations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_omnichannelpersonalizations(*msdyn_omnichannelpersonalizationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_omnichannelpersonalizations(*msdyn_omnichannelpersonalizationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_omnichannelpersonalizations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_omnichannelpersonalizations(*msdyn_omnichannelpersonalizationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_omnichannelpersonalizations(*msdyn_omnichannelpersonalizationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_omnichannelpersonalizations
DisplayCollectionName	Omnichannel Personalizations
DisplayName	Omnichannel Personalization
EntitySetName	msdyn_omnichannelpersonalizations
IsBPFEntity	False
LogicalCollectionName	msdyn_omnichannelpersonalizations
LogicalName	msdyn_omnichannelpersonalization

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_omnichannelpersonalizationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_omnichannelpersonalization

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_omnichannelpersonalizationId
- msdyn_personalizationcontextkey
- msdyn_personalizationvalue
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name

Property	Value
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_omnichannelpersonalizationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Omnichannel Personalization
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_omnichannelpersonalizationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_personalizationcontextkey

Property	Value
Description	Personalization Context Key
DisplayName	Personalization Context Key
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_personalizationcontextkey
MaxLength	500
RequiredLevel	None
Type	String

msdyn_personalizationvalue

Property	Value
Description	Personalization Value
DisplayName	Personalization Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_personalizationvalue
MaxLength	2000
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Omnichannel Personalization
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Omnichannel Personalization
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_omnichannelqueue Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores omni-channel work items of a specific issue type or a specific team

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_omnichannelqueues(*msdyn_omnichannelqueueid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_omnichannelqueues See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_omnichannelqueues(*msdyn_omnichannelqueueid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_omnichannelqueues(*msdyn_omnichannelqueueid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_omnichannelqueues See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_omnichannelqueues(*msdyn_omnichannelqueueid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_omnichannelqueues(*msdyn_omnichannelqueueid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_omnichannelqueues
DisplayCollectionName	Omnichannel Queues (Deprecated)
DisplayName	Omnichannel Queue (Deprecated)
EntitySetName	msdyn_omnichannelqueues
IsBPFEntity	False
LogicalCollectionName	msdyn_omnichannelqueues

Property	Value
LogicalName	msdyn_omnichannelqueue
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_omnichannelqueueid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_omnichannelqueue

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_Isdefaultqueue
- msdyn_name
- msdyn_omnichannelqueueId
- msdyn_Priority
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_Isdefaultqueue

Property	Value
Description	
DisplayName	Is Default Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isdefaultqueue

Property	Value
RequiredLevel	None
Type	Boolean

msdyn_Isdefaultqueue Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_omnichannelqueueId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Omnichannel Queue (Deprecated)
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_omnichannelqueueid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Priority

Property	Value
Description	
DisplayName	Priority
Format	None

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_priority
MaxValue	2147483647
MinValue	1
RequiredLevel	ApplicationRequired
Type	Integer

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Omni-channel queue
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Omni-channel queue
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam

- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	
Type	Lookup

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record

Property	Value
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_msdyn_omnichannelqueue_msdyn_ocliveworkitem_queueid
- msdyn_msdyn_omnichannelqueue_msdyn_liveconversation
- msdyn_msdyn_omnichannelqueue_msdyn_ocsession_queueid

msdyn_msdyn_omnichannelqueue_msdyn_ocliveworkitem_queueid

Property	Value
ReferencingEntity	msdyn_ocliveworkitem
ReferencingAttribute	msdyn_queueid
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_omnichannelqueue_msdyn_ocliveworkitem_queueid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_omnichannelqueue_msdyn_liveconversation

Same as msdyn_liveconversation entity msdyn_msdyn_omnichannelqueue_msdyn_liveconversation Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_liveconversation
ReferencingAttribute	msdyn_queueid
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_omnichannelqueue_msdyn_liveconversation
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink

Property	Value
	Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_omnichannelqueue_msdyn_ocsession_queueid

Same as msdyn_ocsession entity msdyn_msdyn_omnichannelqueue_msdyn_ocsession_queueid Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_ocsession
ReferencingAttribute	msdyn_queueid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_omnichannelqueue_msdyn_ocsession_queueid
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_omnichannelsyncconfig Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Config for entities to be synced to Omnichannel

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_omnichannelsyncconfigs(*msdyn_omnichannelsyncconfigid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_omnichannelsyncconfigs See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_omnichannelsyncconfigs(*msdyn_omnichannelsyncconfigid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_omnichannelsyncconfigs(*msdyn_omnichannelsyncconfigid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_omnichannelsyncconfigs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequ
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_omnichannelsyncconfigs(*msdyn_omnichannelsyncconfigid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_omnichannelsyncconfigs(*msdyn_omnichannelsyncconfigid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_omnichannelsyncconfigs
DisplayCollectionName	Omnichannel Sync Configs
DisplayName	Omnichannel Sync Config
EntitySetName	msdyn_omnichannelsyncconfigs
IsBPFEntity	False
LogicalCollectionName	msdyn_omnichannelsyncconfigs
LogicalName	msdyn_omnichannelsyncconfig

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_omnichannelsyncconfigid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_omnichannelsyncconfig

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_configJson
- msdyn_name
- msdyn_omnichannelsyncconfigId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_configJson

Property	Value
Description	Config for defining entities to be synced to Omnichannel
DisplayName	Config Json
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_configjson
MaxLength	4000

Property	Value
RequiredLevel	ApplicationRequired
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_omnichannelsyncconfigId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Omnichannel Sync Config
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_omnichannelsyncconfigid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Omnichannel Sync Config
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Omnichannel Sync Config
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_operatinghour Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores all the operating hours that are configured for an organization.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_operatinghours(*msdyn_operatinghourid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_operatinghours See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_operatinghours(*msdyn_operatinghourid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_operatinghours(*msdyn_operatinghourid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_operatinghours See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_operatinghours(*msdyn_operatinghourid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_operatinghours(*msdyn_operatinghourid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_operatinghours
DisplayCollectionName	Operating Hours
DisplayName	Operating Hour
EntitySetName	msdyn_operatinghours

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_operatinghours
LogicalName	msdyn_operatinghour
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_operatinghourid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_operatinghour

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_calendarid
- msdyn_Description
- msdyn_EnableAllDays
- msdyn_Endtimestring
- msdyn_name
- msdyn_oc_daysofweek
- msdyn_operatinghourId
- msdyn_starttimestring
- msdyn_Timezone
- msdyn_Totalworkhours
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_calendarid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Storing Calendar Id Guid as string for WorkHourControl.
DisplayName	Calendarid
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_calendarid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Description

Property	Value
Description	Provide description about presence
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	500
RequiredLevel	None
Type	Memo

msdyn_EnableAllDays

Property	Value
Description	Enable work hours for all days of the week
DisplayName	24/7
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablealldays
RequiredLevel	None
Type	Boolean

msdyn_EnableAllDays Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_Endtimestring

Property	Value
Description	Enter time in 24-hour format (HH:mm).
DisplayName	End time
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_endtimestring
MaxLength	10
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_oc_daysofweek

Property	Value
Description	Work days
DisplayName	Work days
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_oc_daysofweek
RequiredLevel	None
Type	MultiSelectPicklist

msdyn_oc_daysofweek Options

Value	Label
192350000	Sun
192350001	Mon
192350002	Tue
192350003	Wed
192350004	Thu
192350005	Fri
192350006	Sat

msdyn_operatinghourId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Operating Hour
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_operatinghourid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_starttimestring

Property	Value
Description	Enter time in 24-hour format (HH:mm).
DisplayName	Start time
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_starttimestring
MaxLength	10

Property	Value
RequiredLevel	None
Type	String

msdyn_Timezone

Property	Value
Description	Time zone code
DisplayName	Time zone
Format	TimeZone
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_timezone
MaxValue	1500
MinValue	-1500
RequiredLevel	None
Type	Integer

msdyn_Totalworkhours

Property	Value
Description	Total work hours
DisplayName	Total work hours
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_totalworkhours
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False

Property	Value
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Operating hour
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Operating hour
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	
Type	Lookup

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_overflowactionconfig Entity Reference

Article • 03/17/2023

> **Note**
>
> Unsure about table vs. entity? See **Developers: Understand terminology in Microsoft Dataverse**. Overflow action configurations.

Added by: Dynamics 365 UR Core Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_overflowactionconfigs(*msdyn_overflowactionconfigid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_overflowactionconfigs See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_overflowactionconfigs(*msdyn_overflowactionconfigid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_overflowactionconfigs(*msdyn_overflowactionconfigid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_overflowactionconfigs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_overflowactionconfigs(*msdyn_overflowactionconfigid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_overflowactionconfigs(*msdyn_overflowactionconfigid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_overflowactionconfigs
DisplayCollectionName	Overflow Action Configs
DisplayName	Overflow Action Config
EntitySetName	msdyn_overflowactionconfigs
IsBPFEntity	False
LogicalCollectionName	msdyn_overflowactionconfigs
LogicalName	msdyn_overflowactionconfig
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_overflowactionconfigid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_overflowactionconfig

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_overflowactionconfigId
- msdyn_overflowactiondata
- msdyn_overflowactiontype
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	Required name field
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100

Property	Value
RequiredLevel	ApplicationRequired
Type	String

msdyn_overflowactionconfigId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Overflow Action Config
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_overflowactionconfigid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_overflowactiondata

Property	Value
Description	Overflow Action Data
DisplayName	Overflow Action Data
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_overflowactiondata
MaxLength	1024
RequiredLevel	ApplicationRequired
Type	Memo

msdyn_overflowactiontype

Property	Value
Description	Overflow Action Type
DisplayName	Overflow Action Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_overflowactiontype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_overflowactiontype Choices/Options

Value	Label

Value	Label
192350000	Default
192350001	End Conversation
192350002	Transfer to Phone

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Overflow Action Config
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Overflow Action Config
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

About the Entity Reference
Web API Reference

msdyn_paneconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Productivity Pane Component Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_paneconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_paneconfigurations(*msdyn_paneconfigurationid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_paneconfigurations(*msdyn_paneconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_paneconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_paneconfigurations(*msdyn_paneconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_paneconfigurations(*msdyn_paneconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_paneconfigurations
DisplayCollectionName	Productivity pane configurations
DisplayName	Productivity pane configuration
EntitySetName	msdyn_paneconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_paneconfigurations
LogicalName	msdyn_paneconfiguration

Property	Value
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_paneconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_paneconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_name
- msdyn_paneconfigurationId
- msdyn_panemode
- msdyn_panestate
- msdyn_UniqueName
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_paneconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Productivity pane configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_paneconfigurationid

Property	Value
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_panemode

Property	Value
Description	
DisplayName	Default mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_panemode
RequiredLevel	None
Type	Boolean

msdyn_panemode Options

Value	Label
1	Expanded
0	Collapsed

DefaultValue: True

msdyn_panestate

Property	Value
Description	
DisplayName	Enable productivity pane
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_panestate
RequiredLevel	None
Type	Boolean

msdyn_panestate Options

Value	Label

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_UniqueName

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Productivity pane configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Productivity pane configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName

- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- OverwriteTime
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.

Property	Value
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_paneconfig_msdyn_tabconfig

Same as msdyn_panetabconfiguration entity msdyn_msdyn_paneconfig_msdyn_tabconfig Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_panetabconfiguration
ReferencingAttribute	msdyn_productivitypaneid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_paneconfig_msdyn_tabconfig
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_paneconfiguration_createdby
- lk_msdyn_paneconfiguration_createdonbehalfby
- lk_msdyn_paneconfiguration_modifiedby
- lk_msdyn_paneconfiguration_modifiedonbehalfby

lk_msdyn_paneconfiguration_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_paneconfiguration_createdby One-To-Many relationship.

lk_msdyn_paneconfiguration_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_paneconfiguration_createdonbehalfby One-To-Many relationship.

lk_msdyn_paneconfiguration_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_paneconfiguration_modifiedby One-To-Many relationship.

lk_msdyn_paneconfiguration_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_paneconfiguration_modifiedonbehalfby One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_panetabconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Productivity Pane Component Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_panetabconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_panetabconfigurations(*msdyn_panetabconfigurationid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_panetabconfigurations(*msdyn_panetabconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_panetabconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_panetabconfigurations(*msdyn_panetabconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_panetabconfigurations(*msdyn_panetabconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_panetabconfigurations
DisplayCollectionName	Pane tab configurations
DisplayName	Pane tab configuration
EntitySetName	msdyn_panetabconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_panetabconfigurations
LogicalName	msdyn_panetabconfiguration
OwnershipType	OrganizationOwned

Property	Value
PrimaryIdAttribute	msdyn_panetabconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_panetabconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_iconpath
- msdyn_isEnabled
- msdyn_name
- msdyn_order
- msdyn_panetabconfigurationId
- msdyn_ProductivityPaneId
- msdyn_ToolId
- msdyn_tooltip
- msdyn_UniqueName
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_iconpath

Property	Value
Description	
DisplayName	Icon Path
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_iconpath
MaxLength	100
RequiredLevel	None
Type	String

msdyn_isEnabled

Property	Value
Description	
DisplayName	Enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isenabled
RequiredLevel	None
Type	Boolean

msdyn_isEnabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_order

Property	Value
Description	
DisplayName	Order
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_order
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_panetabconfigurationId

Property	Value

Property	Value
Description	Unique identifier for entity instances
DisplayName	Pane tab configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_panetabconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_ProductivityPaneId

Property	Value
Description	Unique identifier for Productivity pane configuration associated with Pane tab configuration.
DisplayName	Productivity Pane
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_productivitypaneid
RequiredLevel	None
Targets	msdyn_paneconfiguration
Type	Lookup

msdyn_ToolId

Property	Value
Description	Unique identifier for Pane tool configuration associated with Pane tab configuration.
DisplayName	Tool
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_toolid
RequiredLevel	ApplicationRequired
Targets	msdyn_panetoolconfiguration
Type	Lookup

msdyn_tooltip

Property	Value

Property	Value
Description	
DisplayName	Tool tip
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_tooltip
MaxLength	100
RequiredLevel	None
Type	String

msdyn_UniqueName

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Pane tab configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Pane tab configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy

- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ProductivityPaneIdName
- msdyn_ToolIdName
- OrganizationId
- OrganizationIdName
- OverwriteTime
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ProductivityPaneIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_productivitypaneidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ToolIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	msdyn_toolidname
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_panetabconfiguration_createdby
- lk_msdyn_panetabconfiguration_createdonbehalfby
- lk_msdyn_panetabconfiguration_modifiedby
- lk_msdyn_panetabconfiguration_modifiedonbehalfby
- msdyn_msdyn_paneconfig_msdyn_tabconfig
- msdyn_msdyn_toolconfig_msdyn_tabconfig

lk_msdyn_panetabconfiguration_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_panetabconfiguration_createdby One-To-Many relationship.

lk_msdyn_panetabconfiguration_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_panetabconfiguration_createdonbehalfby One-To-Many relationship.

lk_msdyn_panetabconfiguration_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_panetabconfiguration_modifiedby One-To-Many relationship.

lk_msdyn_panetabconfiguration_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_panetabconfiguration_modifiedonbehalfby One-To-Many relationship.

msdyn_msdyn_paneconfig_msdyn_tabconfig

See msdyn_paneconfiguration Entity msdyn_msdyn_paneconfig_msdyn_tabconfig One-To-Many relationship.

msdyn_msdyn_toolconfig_msdyn_tabconfig

See msdyn_panetoolconfiguration Entity msdyn_msdyn_toolconfig_msdyn_tabconfig One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_panetoolconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Productivity Pane Component Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_panetoolconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_panetoolconfigurations(*msdyn_panetoolconfigurationid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_panetoolconfigurations(*msdyn_panetoolconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_panetoolconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_panetoolconfigurations(*msdyn_panetoolconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_panetoolconfigurations(*msdyn_panetoolconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_panetoolconfigurations
DisplayCollectionName	Pane tool configurations
DisplayName	Pane tool configuration
EntitySetName	msdyn_panetoolconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_panetoolconfigurations
LogicalName	msdyn_panetoolconfiguration
OwnershipType	OrganizationOwned

Property	Value
PrimaryIdAttribute	msdyn_panetoolconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_panetoolconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_category
- msdyn_controlname
- msdyn_data
- msdyn_defaulticon
- msdyn_description
- msdyn_isConfigurable
- msdyn_learnmorelink
- msdyn_name
- msdyn_panetoolconfigurationId
- msdyn_toolConfigurationEntity
- msdyn_UniqueName
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_category

Property	Value
Description	
DisplayName	Category
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_category
RequiredLevel	None
Type	Picklist

msdyn_category Options

Value	Label
100000000	Uncategorized
100000001	Agent Guidance
100000002	Reference
100000003	Collabaration
100000004	Automated action

msdyn_controlname

Property	Value
Description	
DisplayName	Control Name
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_controlname
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_data

Property	Value
Description	
DisplayName	Data
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_data
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_defaulticon

Property	Value
Description	
DisplayName	Default Icon
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_defaulticon
MaxLength	100
RequiredLevel	None
Type	String

msdyn_description

Property	Value
Description	
DisplayName	Description
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	256
RequiredLevel	None
Type	String

msdyn_isConfigurable

Property	Value
Description	
DisplayName	Configurable
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isconfigurable
RequiredLevel	None
Type	Boolean

msdyn_isConfigurable Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_learnmorelink

Property	Value
Description	
DisplayName	Learn More Link
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_learnmorelink
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_panetoolconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Pane tool configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_panetoolconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_toolConfigurationEntity

Property	Value
Description	
DisplayName	Tool Configuration Entity
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_toolconfigurationentity
MaxLength	100
RequiredLevel	None
Type	String

msdyn_UniqueName

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Pane tool configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Pane tool configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy

- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- OverwriteTime
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired

Property	Value
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution

Property	Value
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_toolconfig_msdyn_tabconfig

Same as msdyn_panetabconfiguration entity msdyn_msdyn_toolconfig_msdyn_tabconfig Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_panetabconfiguration
ReferencingAttribute	msdyn_toolid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_toolconfig_msdyn_tabconfig
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_panetoolconfiguration_createdby
- lk_msdyn_panetoolconfiguration_createdonbehalfby
- lk_msdyn_panetoolconfiguration_modifiedby
- lk_msdyn_panetoolconfiguration_modifiedonbehalfby

lk_msdyn_panetoolconfiguration_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_panetoolconfiguration_createdby One-To-Many relationship.

lk_msdyn_panetoolconfiguration_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_panetoolconfiguration_createdonbehalfby One-To-Many relationship.

lk_msdyn_panetoolconfiguration_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_panetoolconfiguration_modifiedby One-To-Many relationship.

lk_msdyn_panetoolconfiguration_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_panetoolconfiguration_modifiedonbehalfby One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_parameterdefinition Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Macros Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_parameterdefinitions(*msdyn_parameterdefinitionid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_parameterdefinitions See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_parameterdefinitions(*msdyn_parameterdefinitionid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_parameterdefinitions(*msdyn_parameterdefinitionid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_parameterdefinitions See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_parameterdefinitions(*msdyn_parameterdefinitionid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_parameterdefinitions(*msdyn_parameterdefinitionid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_parameterdefinitions
DisplayCollectionName	Parameter definitions
DisplayName	Parameter definition
EntitySetName	msdyn_parameterdefinitions
IsBPFEntity	False
LogicalCollectionName	msdyn_parameterdefinitions
LogicalName	msdyn_parameterdefinition
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_parameterdefinitionid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_parameterdefinition

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_defaultvalue
- msdyn_description
- msdyn_DisplayName
- msdyn_jsonobjectstructure
- msdyn_name
- msdyn_parameterdefinitionId
- msdyn_parametertype
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_defaultvalue

Property	Value
Description	
DisplayName	Default Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_defaultvalue
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_description

Property	Value
Description	
DisplayName	Description
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_DisplayName

Property	Value
Description	
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_displayname
MaxLength	2000
RequiredLevel	None
Type	String

msdyn_jsonobjectstructure

Property	Value
Description	JSON string describing parameter structure for a JSON or an Array type parameter
DisplayName	Object structure definition
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_jsonobjectstructure
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_parameterdefinitionId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Parameter definition
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_parameterdefinitionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_parametertype

Property	Value
Description	
DisplayName	Parameter Type
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_parametertype
MaxLength	1000

Property	Value
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Parameter definition
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Parameter definition
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.

Property	Value
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-Many Relationships

Relationship details provided where the msdyn_parameterdefinition entity is the first entity in the relationship. Listed by **SchemaName**.

- msdyn_msdyn_paramdef_msdyn_actionoutputparam
- msdyn_msdyn_paramdef_msdyn_actioninputparam

msdyn_msdyn_paramdef_msdyn_actionoutputparam

IntersectEntityName: msdyn_msdyn_paramdef_msdyn_actionoutputparam

Entity 1

Property	Value
IntersectAttribute	msdyn_parameterdefinitionid
IsCustomizable	True
LogicalName	msdyn_parameterdefinition
NavigationPropertyName	msdyn_msdyn_paramdef_msdyn_actionoutputparam
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Entity 2

Property	Value
LogicalName	msdyn_actionoutputparameter
IntersectAttribute	msdyn_actionoutputparameterid
NavigationPropertyName	msdyn_msdyn_paramdef_msdyn_actionoutputparam
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

msdyn_msdyn_paramdef_msdyn_actioninputparam

IntersectEntityName: msdyn_msdyn_paramdef_msdyn_actioninputparam

Entity 1

Property	Value
IntersectAttribute	msdyn_parameterdefinitionid
IsCustomizable	True
LogicalName	msdyn_parameterdefinition
NavigationPropertyName	msdyn_msdyn_paramdef_msdyn_actioninputparam
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Entity 2

Property	Value
LogicalName	msdyn_actioninputparameter
IntersectAttribute	msdyn_parameterdefinitionid
NavigationPropertyName	msdyn_msdyn_paramdef_msdyn_actioninputparam
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_personalmessage Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Omnichannel agents's personal quick replies

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_personalmessages(*msdyn_personalmessageid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_personalmessages See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_personalmessages(*msdyn_personalmessageid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_personalmessages(*msdyn_personalmessageid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_personalmessages See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_personalmessages(*msdyn_personalmessageid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_personalmessages(*msdyn_personalmessageid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_personalmessages
DisplayCollectionName	Personal quick replies
DisplayName	Personal quick reply
EntitySetName	msdyn_personalmessages
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_personalmessages
LogicalName	msdyn_personalmessage
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_personalmessageid
PrimaryNameAttribute	msdyn_title
SchemaName	msdyn_personalmessage

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_locale_field
- msdyn_message
- msdyn_personalmessageId
- msdyn_tagscontrolfield
- msdyn_title
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_locale_field

Property	Value
Description	Locale
DisplayName	Locale
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_locale_field
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_locale_field Options

Value	Label
1025	ar-SA
1029	cs-CZ
1030	da-DK
1031	de-DE
1033	en-US
1035	fi-FI
1036	fr-FR
1037	he-IL
1040	it-IT
1041	ja-JP
1042	ko-KR
1043	nl-NL
1044	nb-NO
1045	pl-PL
1046	pt-BR
1048	ro-RO
1049	ru-RU
1053	sv-SE
1054	th-TH
1055	tr-TR
1057	id-ID
2052	zh-CN
2070	pt-PT
3082	es-ES

msdyn_message

Property	Value
Description	Message
DisplayName	Message
Format	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_message
MaxLength	4000
RequiredLevel	ApplicationRequired
Type	Memo

msdyn_personalmessageId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Personal quick reply
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_personalmessageid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_tagscontrolfield

Property	Value
Description	Dummy field to render the tags control
DisplayName	TagsControlField
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_tagscontrolfield
MaxLength	100
RequiredLevel	None
Type	String

msdyn_title

Property	Value
Description	Name for the personal message
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_title
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Personal Message
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Personal Message
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit

- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-Many Relationships

Relationship details provided where the msdyn_personalmessage entity is the first entity in the relationship. Listed by **SchemaName**.

msdyn_msdyn_personalmessage_msdyn_octag

IntersectEntityName: msdyn_msdyn_personalmessage_msdyn_octag

Entity 1

Property	Value
IntersectAttribute	msdyn_personalmessageid
IsCustomizable	True
LogicalName	msdyn_personalmessage
NavigationPropertyName	msdyn_msdyn_personalmessage_msdyn_octag
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Entity 2

Property	Value
LogicalName	msdyn_octag
IntersectAttribute	msdyn_octagid
NavigationPropertyName	msdyn_msdyn_personalmessage_msdyn_octag
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_Personalsoundsetting Entity Reference

Article • 03/17/2023

Entity to store personalized sound records for the users.

Added by: Final sound solution Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_Personalsoundsettings(*activityid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_Personalsoundsettings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_Personalsoundsettings(*activityid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_Personalsoundsettings(*activityid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_Personalsoundsettings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_Personalsoundsettings(*activityid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_Personalsoundsettings(*activityid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_Personalsoundsettings
DisplayCollectionName	Personal sound settings
DisplayName	Personal sound setting
EntitySetName	msdyn_personalsoundsettings
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_personalsoundsettings
LogicalName	msdyn_personalsoundsetting
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_personalsoundsettingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_Personalsoundsetting

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_Channel
- msdyn_Enablesound
- msdyn_isdefaultrecord
- msdyn_linksoundfile
- msdyn_loopsound
- msdyn_Name
- msdyn_PersonalsoundsettingId
- msdyn_scenario
- msdyn_volume
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_Channel

Property	Value
Description	Link channels
DisplayName	Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channel
RequiredLevel	None
Targets	msdyn_channel
Type	Lookup

msdyn_Enablesound

Property	Value
Description	Enable sound for this scenario
DisplayName	Enable sound
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablesound
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_Enablesound Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_isdefaultrecord

Property	Value
Description	Is this the default record? To be used for OOB settings.
DisplayName	Is default record
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isdefaultrecord
RequiredLevel	ApplicationRequired

Property	Value
Type	Boolean

msdyn_isdefaultrecord Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_linksoundfile

Property	Value
Description	Use this field to link the sound file with the sound setting record
DisplayName	Link sound file
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_linksoundfile
RequiredLevel	None
Targets	msdyn_soundfile
Type	Lookup

msdyn_loopsound

Property	Value
Description	Use this field to play the sound till notification timeout. For incoming message, set it to No.
DisplayName	Loop Sound
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_loopsound
RequiredLevel	None
Type	Boolean

msdyn_loopsound Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_Name

Property	Value
Description	Required name field
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_PersonalsoundsettingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Personal sound setting
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_personalsoundsettingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_scenario

Property	Value
Description	Link channels
DisplayName	Scenario
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_scenario
RequiredLevel	None
Targets	msdyn_channel
Type	Lookup

msdyn_volume

Property	Value
Description	Volume for the scenario
DisplayName	Volume
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_volume
MaxValue	100
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Personal sound setting
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Personal sound setting
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None

Property	Value
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ChannelName
- msdyn_linksoundfileName
- msdyn_scenarioName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ChannelName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_channelname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

msdyn_linksoundfileName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_linksoundfilename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_scenarioName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_scenarioname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

See also

About the Entity Reference
Programming reference for Dynamics 365 Customer Engagement (on-premises)
Web API reference

msdyn_personasecurityrolemapping Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_personasecurityrolemappings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_personasecurityrolemappings(*msdyn_personasecurityrolemappingid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_personasecurityrolemappings(*msdyn_personasecurityrolemappingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_personasecurityrolemappings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_personasecurityrolemappings(*msdyn_personasecurityrolemappingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_personasecurityrolemappings(*msdyn_personasecurityrolemappingid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_personasecurityrolemappings
DisplayCollectionName	Persona Security Role Mappings
DisplayName	Persona Security Role Mapping
EntitySetName	msdyn_personasecurityrolemappings
IsBPFEntity	False
LogicalCollectionName	msdyn_personasecurityrolemappings
LogicalName	msdyn_personasecurityrolemapping
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_personasecurityrolemappingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_personasecurityrolemapping

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_name
- msdyn_personasecurityrolemappingId
- msdyn_PersonaType
- msdyn_SecurityRoleId
- msdyn_UniqueName
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_personasecurityrolemappingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Persona Security Role Mapping
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_personasecurityrolemappingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_PersonaType

Property	Value
Description	
DisplayName	Persona Type
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_personatype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_PersonaType Options

Value	Label

Value	Label
1	Administrator
2	Supervisor
3	Agent

msdyn_SecurityRoleId

Property	Value
Description	Unique identifier for Security Role associated with Persona Security Role Mapping.
DisplayName	Security Role
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_securityroleid
RequiredLevel	ApplicationRequired
Targets	role
Type	Lookup

msdyn_UniqueName

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Persona Security Role Mapping
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Persona Security Role Mapping
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0

Value	Label	State
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName

- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_SecurityRoleIdName
- OrganizationId
- OrganizationIdName
- OverwriteTime
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished

Value	Label
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_SecurityRoleIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_securityroleidname
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired

Property	Value
Type	DateTime

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_preferredagent Entity Reference

Article • 10/03/2022

Added by: Dynamics 365 UR Core solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_preferredagents(*msdyn_preferredagentid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_preferredagents See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_preferredagents(*msdyn_preferredagentid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_preferredagents(*msdyn_preferredagentid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_preferredagents See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_preferredagents(*msdyn_preferredagentid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_preferredagents(*msdyn_preferredagentid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_preferredagents
DisplayCollectionName	Preferred Agents
DisplayName	Preferred Agent
EntitySetName	msdyn_preferredagents
IsBPFEntity	False
LogicalCollectionName	msdyn_preferredagents
LogicalName	msdyn_preferredagent
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_preferredagentid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_preferredagent

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_preferencerating
- msdyn_preferredagentId
- msdyn_recordId
- msdyn_recordIdType
- msdyn_recordtype
- msdyn_systemuserid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_preferencerating

Property	Value
Description	Stores The preference rating for a preferred agent for a specific record
DisplayName	Preference Rating
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_preferencerating
MaxValue	1000000000
MinValue	0
Precision	2
RequiredLevel	None
Type	Double

msdyn_preferredagentId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Preferred Agent
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_preferredagentid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_recordId

Property	Value
Description	
DisplayName	Record Id
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_recordid
RequiredLevel	ApplicationRequired
Targets	account,contact
Type	Lookup

msdyn_recordIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_recordidtype
RequiredLevel	None
Type	EntityName

msdyn_recordtype

Property	Value
Description	Stores the Record Type of the Preferred Agent
DisplayName	Record Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_recordtype
RequiredLevel	None
Type	Picklist

msdyn_recordtype Choices/Options

Value	Label
192350000	Account
192350001	Contact

msdyn_systemuserid

Property	Value
Description	System User
DisplayName	System User

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_systemuserid
RequiredLevel	ApplicationRequired
Targets	systemuser
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type

Property	Value
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Preferred Agent
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Preferred Agent
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName

- msdyn_recordIdName
- msdyn_recordIdYomiName
- msdyn_systemuseridName
- msdyn_systemuseridYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon

Property	Value
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_recordIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_recordidname
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_recordIdYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_recordidyominame
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_systemuseridName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_systemuseridname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_systemuseridYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_systemuseridyominame
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808

Property	Value
RequiredLevel	None
Type	BigInt

See also

About the Entity Reference
Web API Reference
msdyn_preferredagentcustomeridentity

msdyn_preferredagentcustomeridentity Entity Reference

Article • 10/03/2022

Added by: Configuration_sn Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_preferredagentcustomeridentities(*msdyn_preferredagentcustomeridentityid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_preferredagentcustomeridentities See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_preferredagentcustomeridentities(*msdyn_preferredagentcustomeridentityid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRe
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_preferredagentcustomeridentities(*msdyn_preferredagentcustomeridentityid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_preferredagentcustomeridentities See Query Data	RetrieveMultipleReques RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessF
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipals
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_preferredagentcustomeridentities(*msdyn_preferredagentcustomeridentityid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_preferredagentcustomeridentities(*msdyn_preferredagentcustomeridentityid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	msdyn_preferredagentcustomeridentities
DisplayCollectionName	Preferred Agent Customer Identities
DisplayName	Preferred Agent Customer Identity
EntitySetName	msdyn_preferredagentcustomeridentities
IsBPFEntity	False
LogicalCollectionName	msdyn_preferredagentcustomeridentities
LogicalName	msdyn_preferredagentcustomeridentity
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_preferredagentcustomeridentityid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_preferredagentcustomeridentity

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_associatedfieldname
- msdyn_entityname
- msdyn_Name
- msdyn_preferredagentcustomeridentityId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_associatedfieldname

Property	Value
Description	
DisplayName	Associated Field Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_associatedfieldname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_entityname

Property	Value

Property	Value
Description	
DisplayName	Entity Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entityname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Name

Property	Value
Description	
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	Recommended
Type	String

msdyn_preferredagentcustomeridentityId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Preferred Agent Customer Identity
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_preferredagentcustomeridentityid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On

Property	Value
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Preferred Agent Customer Identity
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode

Property	Value
RequiredLevel	SystemRequired
Type	State

statecode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Preferred Agent Customer Identity
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.

Property	Value
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningBusinessUnitName
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningBusinessUnitName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunitname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

About the Entity Reference
Web API Reference
msdyn_preferredagent

msdyn_presence Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores presence status information

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_presences See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_presences(*msdyn_presenceid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_presences(*msdyn_presenceid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_presences See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_presences(*msdyn_presenceid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_presences(*msdyn_presenceid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value

Property	Value
CollectionSchemaName	msdyn_presences
DisplayCollectionName	Presence
DisplayName	Presence
EntitySetName	msdyn_presences
IsBPFEntity	False
LogicalCollectionName	msdyn_presences
LogicalName	msdyn_presence
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_presenceid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_presence

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_basepresencestatus
- msdyn_canuserset
- msdyn_description
- msdyn_name
- msdyn_presenceId
- msdyn_presencestatustext
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.

Property	Value
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_basepresencestatus

Property	Value
Description	Base presence option set value this user presence maps to
DisplayName	Base status
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_basepresencestatus
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_basepresencestatus Options

Value	Label
192360000	Available
192360001	Busy
192360002	Busy - DND
192360003	Away

Value	Label
192360004	Offline

msdyn_canuserset

Property	Value
Description	Indicates if this status can be set by the user
DisplayName	User can set?
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_canuserset
RequiredLevel	None
Type	Boolean

msdyn_canuserset Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_description

Property	Value
Description	Provide description about presence
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description

Property	Value
MaxLength	500
RequiredLevel	None
Type	Memo

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_presenceId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Presence
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_presenceid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_presencestatustext

Property	Value
Description	Status message shown to the user viewing the current presence
DisplayName	Presence text
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_presencestatustext
MaxLength	500
RequiredLevel	ApplicationRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value

Property	Value
Description	Status of the Presence
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Presence
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0

Value	Label	State
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.

Property	Value
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_productivitypaneconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Attributes related to productivity pane configurations

Added by: Productivity Pane Control Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_productivitypaneconfigurations(*msdyn_productivitypaneconfigurationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_productivitypaneconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_productivitypaneconfigurations(*msdyn_productivitypaneconfigurationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionReque
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_productivitypaneconfigurations(*msdyn_productivitypaneconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_productivitypaneconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessReq
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAn
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_productivitypaneconfigurations(*msdyn_productivitypaneconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_productivitypaneconfigurations(*msdyn_productivitypaneconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_productivitypaneconfigurations
DisplayCollectionName	Productivity pane configurations
DisplayName	Productivity pane configuration
EntitySetName	msdyn_productivitypaneconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_productivitypaneconfigurations
LogicalName	msdyn_productivitypaneconfiguration

Property	Value
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_productivitypaneconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_productivitypaneconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_Applicationname
- msdyn_name
- msdyn_productivitypaneconfigurationId
- msdyn_Productivitypanemode
- msdyn_Productivitypanestate
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_Applicationname

Property	Value
Description	Sets the application name
DisplayName	Application name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_applicationname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_productivitypaneconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Productivity pane configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_productivitypaneconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Productivitypanemode

Property	Value
Description	Unique value to set the productivity pane to expanded or collpased mode
DisplayName	Default mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_productivitypanemode
RequiredLevel	None
Type	Boolean

msdyn_Productivitypanemode Options

Value	Label
1	Expanded

Value	Label
0	Collapsed

DefaultValue: False

msdyn_Productivitypanestate

Property	Value
Description	Unique value to set the productivity mode to enabled or disabled mode
DisplayName	Enable productivity pane
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_productivitypanestate
RequiredLevel	None
Type	Boolean

msdyn_Productivitypanestate Options

Value	Label
1	Enabled
0	Disabled

DefaultValue: False

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Productivity pane configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Productivity pane configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_provider Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

A list of third-party providers that bring capabilities into the application.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_providers See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_providers(*msdyn_providerid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_providers(*msdyn_providerid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_providers See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_providers(*msdyn_providerid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_providers(*msdyn_providerid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value

Property	Value
CollectionSchemaName	msdyn_providers
DisplayCollectionName	Providers
DisplayName	Provider
EntitySetName	msdyn_providers
IsBPFEntity	False
LogicalCollectionName	msdyn_providers
LogicalName	msdyn_provider
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_providerid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_provider

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_providerId
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False

Property	Value
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_providerId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Provider
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	msdyn_providerid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Provider
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired

Property	Value
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Provider
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy

- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

Property	Value
ReferencingEntity	msdyn_channelcapability
ReferencingAttribute	msdyn_provider
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_msdyn_provider_msdyn_channelcapability_Provider
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_questionsequence Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the question sequence for a chat widget survey

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_questionsequences See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_questionsequences See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_questionsequences(*msdyn_questionsequenceid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_questionsequences
DisplayCollectionName	Survey Question Sequences
DisplayName	Survey Question Sequence
EntitySetName	msdyn_questionsequences
IsBPFEntity	False
LogicalCollectionName	msdyn_questionsequences

Property	Value
LogicalName	msdyn_questionsequence
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_questionsequenceid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_questionsequence

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_ChatEngagementToChatSequenceId
- msdyn_chatquestionnairetype
- msdyn_name
- msdyn_QuestionRequired
- msdyn_questionsequenceId
- msdyn_SurveyQuestion
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- SequenceNumber
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_ChatEngagementToChatSequenceId

Property	Value
Description	Unique identifier for Chat widget associated with Survey question sequence.
DisplayName	Chat widget
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_chatengagementtochatsequenceid
RequiredLevel	None
Targets	msdyn_livechatconfig
Type	Lookup

msdyn_chatquestionnairetype

Property	Value
Description	Type of survey question
DisplayName	Survey type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_chatquestionnairetype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_chatquestionnairetype Options

Value	Label
192350000	Pre-chat authenticated
192350001	Pre-chat unauthenticated
192350002	Offline authenticated
192350003	Offline unauthenticated
192350004	Post-chat authenticated
192350005	Post-chat unauthenticated

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_QuestionRequired

Property	Value
Description	Is a mandatory survey question to be answered
DisplayName	Required
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_questionrequired
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_QuestionRequired Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_questionsequenceId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Survey Question Sequence
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_questionsequenceid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_SurveyQuestion

Property	Value
Description	Name of the survey question
DisplayName	Survey question name
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_surveyquestion
RequiredLevel	ApplicationRequired
Targets	msdyn_surveyquestion
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

SequenceNumber

Property	Value
Description	Sequence number for questions to display in the specified order
DisplayName	Order

Property	Value
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	sequencenumber
MaxValue	2147483647
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

statecode

Property	Value
Description	Status of the Survey question sequence
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Survey question sequence
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0

Value	Label	State
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy

- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ChatEngagementToChatSequenceIdName
- msdyn_SurveyQuestionName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ChatEngagementToChatSequenceIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_chatengagementtochatsequenceidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_SurveyQuestionName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_surveyquestionname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_livechatconfig_msdyn_questionsequence
- msdyn_msdyn_surveyquestion_msdyn_questionsequence_SurveyQuestion

msdyn_livechatconfig_msdyn_questionsequence

See msdyn_livechatconfig Entity msdyn_livechatconfig_msdyn_questionsequence One-To-Many relationship.

msdyn_msdyn_surveyquestion_msdyn_questionsequence_SurveyQuestion

See msdyn_surveyquestion Entity msdyn_msdyn_surveyquestion_msdyn_questionsequence_SurveyQuestion One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_routingconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Defines routing details for the workstream

Added by: Dynamics 365 UR Core Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_routingconfigurations(*msdyn_routingconfigurationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_routingconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_routingconfigurations(*msdyn_routingconfigurationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_routingconfigurations(*msdyn_routingconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_routingconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_routingconfigurations(*msdyn_routingconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_routingconfigurations(*msdyn_routingconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_routingconfigurations
DisplayCollectionName	Routing configurations
DisplayName	Routing configuration
EntitySetName	msdyn_routingconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_routingconfigurations
LogicalName	msdyn_routingconfiguration

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_routingconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_routingconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_isactiveconfiguration
- msdyn_liveworkstreamid
- msdyn_name
- msdyn_routingconfigurationId
- msdyn_UniqueName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_isactiveconfiguration

Property	Value
Description	
DisplayName	Is active configuration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isactiveconfiguration
RequiredLevel	None
Type	Boolean

msdyn_isactiveconfiguration Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_liveworkstreamid

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Work stream identifier
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	None
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	Name of the routing configuration
DisplayName	Name
FormatName	Text
IsLocalizable	True

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_routingconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Routing configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_routingconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_UniqueName

Property	Value
Description	Unique name for the routing configuration record
DisplayName	Unique name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False

Property	Value
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Routing configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Routing configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- OverwriteTime
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired

Property	Value
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamidName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_routingconfigurationstep Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Links the routing configuration with ruleset

Added by: Dynamics 365 UR Core Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_routingconfigurationsteps(*msdyn_routingconfigurationstepid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_routingconfigurationsteps See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_routingconfigurationsteps(*msdyn_routingconfigurationstepid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_routingconfigurationsteps(*msdyn_routingconfigurationstepid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_routingconfigurationsteps See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRe
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_routingconfigurationsteps(*msdyn_routingconfigurationstepid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_routingconfigurationsteps(*msdyn_routingconfigurationstepid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_routingconfigurationsteps
DisplayCollectionName	Routing configuration steps
DisplayName	Routing configuration step
EntitySetName	msdyn_routingconfigurationsteps
IsBPFEntity	False
LogicalCollectionName	msdyn_routingconfigurationsteps
LogicalName	msdyn_routingconfigurationstep

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_routingconfigurationstepid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_routingconfigurationstep

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- IsCustomizable
- msdyn_name
- msdyn_routingconfigurationid
- msdyn_routingconfigurationstepId
- msdyn_rulesetid
- msdyn_steporder
- msdyn_type
- msdyn_UniqueName
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Added by: Basic Solution Solution

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IsCustomizable

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Is Customizable

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	iscustomizable
RequiredLevel	SystemRequired
Type	ManagedProperty

msdyn_name

Property	Value
Description	Name of routing configuration step record
DisplayName	Name
FormatName	Text
IsLocalizable	True
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_routingconfigurationid

Property	Value
Description	Routing configuration for the routing configuration step
DisplayName	Routing configuration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routingconfigurationid
RequiredLevel	None
Targets	msdyn_routingconfiguration
Type	Lookup

msdyn_routingconfigurationstepId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Routing configuration step
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_routingconfigurationstepid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_rulesetid

Property	Value
Description	Rule set for the routing configuration step
DisplayName	Rule set
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_rulesetid
RequiredLevel	None
Targets	msdyn_decisionruleset
Type	Lookup

msdyn_steporder

Property	Value
Description	Order of execution for rule set
DisplayName	Step order
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_steporder
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_type

Property	Value
Description	Defines the purpose of routing configuration step
DisplayName	Step type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
RequiredLevel	None
Type	Picklist

msdyn_type Options

Value	Label
192350000	Enrichment
192350001	Skill identification
192350002	Queue identification

msdyn_UniqueName

Property	Value
Description	Unique name for the routing configuration step record
DisplayName	Unique name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	SystemRequired
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Routing configuration step
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Routing configuration step
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentIdUnique
- ComponentState
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_routingconfigurationidName
- msdyn_rulesetidName
- OverwriteTime

- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- SolutionId
- SupportingSolutionId
- VersionNumber

ComponentIdUnique

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Row id unique
IsValidForForm	False
IsValidForRead	True
LogicalName	componentidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

ComponentState

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.

Property	Value
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

IsManaged

Added by: Basic Solution Solution

Property	Value
Description	Indicates whether the solution component is part of a managed solution.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_routingconfigurationidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_routingconfigurationidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_rulesetidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_rulesetidname
MaxLength	200
RequiredLevel	None
Type	String

OverwriteTime

Added by: Basic Solution Solution

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

SolutionId

Added by: Basic Solution Solution

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Added by: Basic Solution Solution

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False

Property	Value
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_routingrequest Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Routing request definition entity

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_routingrequests(*msdyn_omnichannelqueueid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_routingrequests See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_routingrequests(*msdyn_omnichannelqueueid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_routingrequests(*msdyn_omnichannelqueueid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_routingrequests See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_routingrequests(*msdyn_omnichannelqueueid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_routingrequests(*msdyn_omnichannelqueueid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_routingrequests
DisplayCollectionName	RoutingRequests
DisplayName	RoutingRequest
EntitySetName	msdyn_routingrequests
IsBPFEntity	False

Property	Value
LogicalCollectionName	msdyn_routingrequests
LogicalName	msdyn_routingrequest
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_routingrequestid
PrimaryNameAttribute	msdyn_entitylogicalname
SchemaName	msdyn_routingrequest

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_entitylogicalname
- msdyn_entityrecordid
- msdyn_entitysetname
- msdyn_queueid
- msdyn_queueitemid
- msdyn_relationshipnamewithliveworkitem
- msdyn_routingrequestId
- msdyn_routingrequesttitle
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_entitylogicalname

Property	Value
Description	The name of the custom entity.

Property	Value
DisplayName	entitylogicalname
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entitylogicalname
MaxLength	100
RequiredLevel	Recommended
Type	String

msdyn_entityrecordid

Property	Value
Description	Unique identifier of the record to be routed to Omnichannel.
DisplayName	entityrecordid
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entityrecordid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_entitysetname

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	entitysetname of the entity being routed.
DisplayName	entitysetname
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_entitysetname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_queueid

Property	Value
Description	Unique identifier of the queue.
DisplayName	queueid
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueid
MaxLength	100
RequiredLevel	Recommended
Type	String

msdyn_queueitemid

Property	Value
Description	Unique identifier of the queue item.
DisplayName	queueitemid
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queueitemid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_relationshipnamewithliveworkitem

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Name that tells the relationship of the Entity with Live Work Item
DisplayName	RelationshipNameWithLiveWorkItem
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_relationshipnamewithliveworkitem
MaxLength	400
RequiredLevel	Recommended
Type	String

msdyn_routingrequestId

Property	Value
Description	Unique identifier for entity instances
DisplayName	RoutingRequest
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_routingrequestid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_routingrequesttitle

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Primary display name value of the record.
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routingrequesttitle
MaxLength	200
RequiredLevel	Recommended
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the RoutingRequest
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the RoutingRequest
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.

Property	Value
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired

Property	Value
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_routingrulesetsetting Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Unified routing for entity Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_routingrulesetsettings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_routingrulesetsettings(*msdyn_routingrulesetsettingid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_routingrulesetsettings(*msdyn_routingrulesetsettingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_routingrulesetsettings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_routingrulesetsettings(*msdyn_routingrulesetsettingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_routingrulesetsettings(*msdyn_routingrulesetsettingid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_routingrulesetsettings
DisplayCollectionName	Routing Rule Set Settings
DisplayName	Routing Rule Set Setting
EntitySetName	msdyn_routingrulesetsettings
IsBPFEntity	False
LogicalCollectionName	msdyn_routingrulesetsettings
LogicalName	msdyn_routingrulesetsetting
OwnershipType	OrganizationOwned

Property	Value
PrimaryIdAttribute	msdyn_routingrulesetsettingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_routingrulesetsetting

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_ismultipleactiveroutingrulesetallowed
- msdyn_name
- msdyn_routingrulesetsettingId
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_ismultipleactiveroutingrulesetallowed

Property	Value
Description	Allow multiple active routing rule set.
DisplayName	Is Multiple Active Routing Rule Set Allowed
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_ismultipleactiveroutingrulesetallowed
RequiredLevel	None
Type	Boolean

msdyn_ismultipleactiveroutingrulesetallowed Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_routingrulesetsettingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Routing Rule Set Setting
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_routingrulesetsettingid
RequiredLevel	SystemRequired

Property	Value
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Routing Rule Set Setting
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value

Property	Value
Description	Reason for the status of the Routing Rule Set Setting
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_rulesetdependencymapping Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

For internal use only entity used to store an implicit mapping between a ruleset and polymorphic entity

Added by: Dynamics 365 UR Decision Engine Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_rulesetdependencymappings(*msdyn_rulesetdependencymappingid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_rulesetdependencymappings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_rulesetdependencymappings(*msdyn_rulesetdependencymappingid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_rulesetdependencymappings(*msdyn_rulesetdependencymappingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_rulesetdependencymappings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAcc
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_rulesetdependencymappings(*msdyn_rulesetdependencymappingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_rulesetdependencymappings(*msdyn_rulesetdependencymappingid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_rulesetdependencymappings
DisplayCollectionName	Rulesetentitymappings
DisplayName	Rulesetentitymapping
EntitySetName	msdyn_rulesetdependencymappings
IsBPFEntity	False
LogicalCollectionName	msdyn_rulesetdependencymappings
LogicalName	msdyn_rulesetdependencymapping

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_rulesetdependencymappingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_rulesetdependencymapping

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_referencedpolymorphicentityid
- msdyn_referencedpolymorphicentityidIdType
- msdyn_referencedpolymorphiclogicalname
- msdyn_referencingruleid
- msdyn_referencingrulename
- msdyn_referencingrulesetid
- msdyn_rulesetdependencymappingId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_referencedpolymorphicentityid

Property	Value
Description	Polymorphic entity id referenced by the ruleset
DisplayName	Referenced polymorphic entity id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_referencedpolymorphicentityid
RequiredLevel	None
Targets	characteristic,msdyn_capacityprofile,msdyn_decisionruleset,queue,ratingvalue
Type	Lookup

msdyn_referencedpolymorphicentityidIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_referencedpolymorphicentityididtype
RequiredLevel	None
Type	EntityName

msdyn_referencedpolymorphiclogicalname

Property	Value
Description	Polymorphic entity logical name referenced by the ruleset
DisplayName	Referenced polymorphic entity logical name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_referencedpolymorphiclogicalname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_referencingruleid

Property	Value
Description	Rule id referencing the polymorphic entity
DisplayName	Referencing rule id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_referencingruleid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_referencingrulename

Property	Value
Description	Rule name referencing the polymorphic entity
DisplayName	Referencing rule name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_referencingrulename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_referencingrulesetid

Property	Value
Description	Ruleset id containing rule referencing the polymorphic entity
DisplayName	Referencing rule set id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_referencingrulesetid
RequiredLevel	None
Targets	msdyn_decisionruleset
Type	Lookup

msdyn_rulesetdependencymappingId

Property	Value
Description	Unique identifier for entity instances

Property	Value
DisplayName	msdyn_rulesetdependencymappingid
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_rulesetdependencymappingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Rule set entity mapping
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Rule set entity mapping
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.

Property	Value
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_referencedpolymorphicentityidName
- msdyn_referencedpolymorphicentityidYomiName
- msdyn_referencingrulesetidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser

- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_referencedpolymorphicentityidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_referencedpolymorphicentityidname
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_referencedpolymorphicentityidYomiName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_referencedpolymorphicentityidyominame
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_referencingrulesetidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_referencingrulesetidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_scenario Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Scenarios and Channels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_scenarios(*msdyn_scenarioid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_scenarios See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_scenarios(*msdyn_scenarioid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_scenarios(*msdyn_scenarioid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_scenarios See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_scenarios(*msdyn_scenarioid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_scenarios(*msdyn_scenarioid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_scenarios
DisplayCollectionName	Scenarios
DisplayName	Scenario

Property	Value
EntitySetName	msdyn_scenarios
IsBPFEntity	False
LogicalCollectionName	msdyn_scenarios
LogicalName	msdyn_scenario
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_scenarioid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_scenario

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_ChannelId
- msdyn_DisplayName
- msdyn_name
- msdyn_NotificationTemplate
- msdyn_parentscenarioid
- msdyn_scenarioId
- msdyn_SessionTemplate
- msdyn_Type
- msdyn_WorkStreamId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648

Property	Value
RequiredLevel	None
Type	Integer

msdyn_ChannelId

Property	Value
Description	Unique identifier for channel associated with Scenario.
DisplayName	Channel
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_channelid
RequiredLevel	None
Targets	msdyn_channel
Type	Lookup

msdyn_DisplayName

Property	Value
Description	Label for the scenario
DisplayName	Display Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_displayname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_name
MaxLength	700
RequiredLevel	ApplicationRequired
Type	String

msdyn_NotificationTemplate

Property	Value
Description	Notification template associated with the scenario
DisplayName	Notification Template
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_notificationtemplate
RequiredLevel	None
Targets	msdyn_notificationtemplate
Type	Lookup

msdyn_parentscenarioid

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	Unique identifier for Scenario associated with Scenario.
DisplayName	Parent Scenario
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_parentscenarioid
RequiredLevel	None
Targets	msdyn_scenario
Type	Lookup

msdyn_scenarioId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Scenario
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	msdyn_scenarioid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_SessionTemplate

Property	Value
Description	Session template associated with the scenario
DisplayName	Session Template
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sessiontemplate
RequiredLevel	None
Targets	msdyn_consoleapplicationsessiontemplate
Type	Lookup

msdyn_Type

Property	Value
Description	
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
RequiredLevel	None
Type	Boolean

msdyn_Type Options

Value	Label
1	Notification
0	Session

DefaultValue: True

msdyn_WorkStreamId

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	Unique identifier for Work Stream associated with Scenario.

Property	Value
DisplayName	WorkStream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_workstreamid
RequiredLevel	None
Targets	msdyn_liveworkstream
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Scenario
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Scenario
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName

- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ChannelIdName
- msdyn_NotificationTemplateName
- msdyn_ParentScenarioIdName
- msdyn_SessionTemplateName
- msdyn_WorkStreamIdName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ChannelIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_channelidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_NotificationTemplateName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_notificationtemplatename
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ParentScenarioIdName

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_parentscenarioidname
MaxLength	700
RequiredLevel	None
Type	String

msdyn_SessionTemplateName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_sessiontemplatename

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_WorkStreamIdName

Added by: Omnichannel for Customer Service Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_workstreamidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_msdyn_scenario_msdyn_scenario

Added by: Omnichannel for Customer Service Patch Solution

Same as msdyn_scenario entity msdyn_msdyn_scenario_msdyn_scenario Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_scenario
ReferencingAttribute	msdyn_parentscenarioid
IsHierarchical	False

Property	Value
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_scenario_msdyn_scenario
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- msdyn_msdyn_scenario_msdyn_scenario
- msdyn_msdyn_consoleapplicationsessiontemplate_msdyn_scenario_SessionTemplate

msdyn_msdyn_scenario_msdyn_scenario

See msdyn_scenario Entity msdyn_msdyn_scenario_msdyn_scenario One-To-Many relationship.

msdyn_msdyn_consoleapplicationsessiontemplate_msdyn_scenario_SessionTemplate

Added by: Channel API Integration Framework Solution

See msdyn_consoleapplicationsessiontemplate Entity msdyn_msdyn_consoleapplicationsessiontemplate_msdyn_scenario_SessionTemplate One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_searchconfiguration Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Configuration entity for agent search screen

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_searchconfigurations(*msdyn_searchconfigurationid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_searchconfigurations See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_searchconfigurations(*msdyn_searchconfigurationid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_searchconfigurations(*msdyn_searchconfigurationid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_searchconfigurations See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_searchconfigurations(*msdyn_searchconfigurationid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_searchconfigurations(*msdyn_searchconfigurationid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_searchconfigurations
DisplayCollectionName	Search Configurations
DisplayName	Search Configuration
EntitySetName	msdyn_searchconfigurations
IsBPFEntity	False
LogicalCollectionName	msdyn_searchconfigurations

Property	Value
LogicalName	msdyn_searchconfiguration
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_searchconfigurationid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_searchconfiguration

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_ConfigBlob
- msdyn_name
- msdyn_searchconfigurationId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_ConfigBlob

Property	Value
Description	Blob that holds the configuration for multiple entities
DisplayName	Config Blob
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_configblob
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_searchconfigurationId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Search configuration
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_searchconfigurationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon

Property	Value
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Search configuration
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Search configuration
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode

Property	Value
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.

Property	Value
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_sentimentanalysis Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Sentiment analysis configuration

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.1/msdyn_sentimentanalysises See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_sentimentanalysises(*msdyn_sentimentanalysisid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_sentimentanalysises(*msdyn_sentimentanalysisid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_sentimentanalysises See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_sentimentanalysises(*msdyn_sentimentanalysisid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_sentimentanalysises(*msdyn_sentimentanalysisid*) See Update	UpdateRequest or Update

Property	Value
CollectionSchemaName	msdyn_sentimentanalysises
DisplayCollectionName	Sentiment analysis
DisplayName	Sentiment analysis
EntitySetName	msdyn_sentimentanalysises
IsBPFEntity	False
LogicalCollectionName	msdyn_sentimentanalysises
LogicalName	msdyn_sentimentanalysis

Property	Value
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_sentimentanalysisid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_sentimentanalysis

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_additionallanguagesenabled
- msdyn_agentthreshold
- msdyn_driversenabled
- msdyn_enabled
- msdyn_name
- msdyn_sentimentanalysisId
- msdyn_supervisorthreshold
- msdyn_supervisorthresholdalerttimeoutseconds
- msdyn_thresholdalertsenabled
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_additionallanguagesenabled

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Whether multi-language support is enabled
DisplayName	Multi-language support enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_additionallanguagesenabled
RequiredLevel	None
Type	Boolean

msdyn_additionallanguagesenabled Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_agentthreshold

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	The agent threshold for sentiment threshold alerts
DisplayName	Agent alert threshold
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentthreshold
RequiredLevel	None
Type	Picklist

msdyn_agentthreshold Options

Value	Label
0	Don't show alerts
7	Very negative

Value	Label
8	Negative
9	Slightly negative

msdyn_driversenabled

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Specifies whether sentiment drivers are reported in Omnichannel Insights
DisplayName	Report sentiment drivers in Omnichannel Insights
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_driversenabled
RequiredLevel	None
Type	Boolean

msdyn_driversenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_enabled

Property	Value
Description	Whether real-time customer sentiment monitoring is enabled
DisplayName	Monitor real-time customer sentiment
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enabled
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enabled Options

Value	Label
1	Yes
0	No

DefaultValue: True

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	None
Type	String

msdyn_sentimentanalysisId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Sentiment analysis
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_sentimentanalysisid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_supervisorthreshold

Added by: Omnichannel - Base Patch Solution

Property	Value

Property	Value
Description	The supervisor threshold for sentiment threshold alerts
DisplayName	Supervisor alert threshold
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_supervisorthreshold
RequiredLevel	None
Type	Picklist

msdyn_supervisorthreshold Options

Value	Label
0	Don't send notifications
7	Very negative
8	Negative
9	Slightly negative

msdyn_supervisorthresholdalerttimeoutseconds

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	This field is deprecated
DisplayName	(Deprecated) Supervisor alert timeout in seconds
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_supervisorthresholdalerttimeoutseconds
MaxValue	500
MinValue	1
RequiredLevel	None
Type	Integer

msdyn_thresholdalertsenabled

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	This field is deprecated
DisplayName	(Deprecated) Threshold alerts enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_thresholdalertsenabled
RequiredLevel	None
Type	Boolean

msdyn_thresholdalertsenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the sentiment analysis
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Sentiment Analysis
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number

Property	Value
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn

- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None

Property	Value
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808

Property	Value
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_sessionevent Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the session events for a session

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_sessionevents(*msdyn_sessioneventid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_sessionevents See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_sessionevents(*msdyn_sessioneventid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_sessionevents(*msdyn_sessioneventid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_sessionevents See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_sessionevents(*msdyn_sessioneventid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_sessionevents(*msdyn_sessioneventid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_sessionevents
DisplayCollectionName	Session events
DisplayName	Session event

Property	Value
EntitySetName	msdyn_sessionevents
IsBPFEntity	False
LogicalCollectionName	msdyn_sessionevents
LogicalName	msdyn_sessionevent
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_sessioneventid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_sessionevent

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_eventinfo
- msdyn_eventreason
- msdyn_eventtime
- msdyn_eventtype
- msdyn_name
- msdyn_omnichannelsession
- msdyn_sessioneventId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_eventinfo

Property	Value
Description	Event information
DisplayName	Event Info
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventinfo
RequiredLevel	None
Type	Picklist

msdyn_eventinfo Options

Value	Label
192350000	Default

msdyn_eventreason

Property	Value
Description	Reason for session event
DisplayName	Event Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventreason
RequiredLevel	None
Type	Picklist

msdyn_eventreason Options

Value	Label
192350000	Default
192350001	AgentTransfer
192350002	QueueTransfer
192350003	PreChatSurvey
192350004	PostchatSurvey
192350005	UserAccept
192350006	AutoAccept
192350007	Closed
192350008	AgentInviteRejected
192350009	AgentInviteTimeout

Value	Label
192350010	AgentDisconnected
192350011	AgentTimeout
192350012	AgentTransferred
192350013	CustomerTimeout
192350014	CustomerDisconnect
192350015	SessionTimeout
192350016	Escalated
192350017	Rejected
192350018	TimedOut
192350019	Accepted
192350020	AutoAccepted
192350021	Disconnect
192350022	Timeout
192350023	End
192350024	BotTransferSession
192350025	BotEndConversation
192350026	AssignToAgentBySupervisor
192350027	AssignToQueueBySupervisor
192350028	CustomerRejoin
192350029	CustomerEndConversation
192350030	AgentEndConversation
192350031	SupervisorTransferToAgent
192350032	AgentEndConsult
192350033	ForceClose
192350034	OverflowQueueTransfer
192350035	OverflowEndConversation
192350036	OverflowAssignToQueue
192350037	SessionEndAfterWrapUp
192350038	ConversationExpired
192350039	Consult
192350040	AgentMonitor
192350041	AgentConversationJoin
192350042	Preview

msdyn_eventtime

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time of session event
DisplayName	Event Time
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventtime
RequiredLevel	None
Type	DateTime

msdyn_eventtype

Property	Value
Description	Type of session event e.g. accept, reject etc
DisplayName	Event Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_eventtype
RequiredLevel	None
Type	Picklist

msdyn_eventtype Options

Value	Label
192350000	Default
192350001	QueueAssigned
192350002	AgentAssigned
192350003	AgentAccepted
192350004	AgentInviteRejected
192350005	SessionEnd
192350006	SessionCreated
192350007	AgentInviteTimeout
192350008	Escalated
192350009	ParticipantInvited
192350010	ParticipantInviteRejected
192350011	ParticipantInviteAccepted
192350012	ParticipantInviteTimeout
192350013	ParticipantEnd

Value	Label
192350014	AgentDisconnected
192350015	AgentTimeout
192350016	CustomerTimeout
192350017	CustomerDisconnected
192350018	TransferedToAgent
192350019	TransferedToQueue
192350020	ParticipantLeft
192350021	BotTransferSession
192350022	BotEndConversation
192350023	AssignToAgentBySupervisor
192350024	AssignToQueueBySupervisor
192350025	CustomerEndConversation
192350026	AgentEndConversation
192350027	AgentAddedToC2Chat
192350028	AgentRemovedFromC2Chat
192350029	AgentEndConsult
192350030	SupervisorForceClose

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_omnichannelsession

Property	Value
Description	Unique identifier for the associated session
DisplayName	Omni Channel Session
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_omnichannelsession
RequiredLevel	None
Targets	msdyn_ocsession
Type	Lookup

msdyn_sessioneventId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Session event
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_sessioneventid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Session event
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Session event
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_omnichannelsessionName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None

Property	Value
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_omnichannelsessionName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_omnichannelsessionname

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_ocsession_sessionevent_nested

Added by: Active Solution Solution

See msdyn_ocsession Entity msdyn_ocsession_sessionevent_nested One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_sessionparticipant Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Users in a session interacting with the customer

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_sessionparticipants(*msdyn_sessionparticipantid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_sessionparticipants See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_sessionparticipants(*msdyn_sessionparticipantid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_sessionparticipants(*msdyn_sessionparticipantid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_sessionparticipants See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_sessionparticipants(*msdyn_sessionparticipantid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_sessionparticipants(*msdyn_sessionparticipantid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_sessionparticipants
DisplayCollectionName	Session participants
DisplayName	Session participant
EntitySetName	msdyn_sessionparticipants
IsBPFEntity	False
LogicalCollectionName	msdyn_sessionparticipants

Property	Value
LogicalName	msdyn_sessionparticipant
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_sessionparticipantid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_sessionparticipant

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_activedirectoryuserid
- msdyn_addedon
- msdyn_agentid
- msdyn_joinedon
- msdyn_lefton
- msdyn_mode
- msdyn_modifiedon
- msdyn_name
- msdyn_omnichannelsession
- msdyn_sessionparticipantId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_activedirectoryuserid

Property	Value
Description	Unique identifier of Active Directory User participating in session.

Property	Value
DisplayName	Active Directory User Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_activedirectoryuserid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_addedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when agent assigned to the session.
DisplayName	Added On
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_addedon
RequiredLevel	None
Type	DateTime

msdyn_agentid

Property	Value
Description	Unique identifier of System User participating in session.
DisplayName	Agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentid
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_joinedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when agent accepted the session.
DisplayName	Joined On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_joinedon
RequiredLevel	None
Type	DateTime

msdyn_lefton

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when agent left the session.
DisplayName	Left On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_lefton
RequiredLevel	None
Type	DateTime

msdyn_mode

Property	Value
Description	Mode of Agent participation i.e. primary, consult, monitor etc.
DisplayName	Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_mode
RequiredLevel	None
Type	Picklist

msdyn_mode Options

Value	Label
192350002	Primary
192350003	Consult
192350004	Monitor

msdyn_modifiedon

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when session participant information was last modified.
DisplayName	Session Participant Modified On
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_modifiedon
RequiredLevel	None
Type	DateTime

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

msdyn_omnichannelsession

Property	Value
Description	Unique identifier of the session associated to the participant.
DisplayName	Omni Channel Session
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_omnichannelsession
RequiredLevel	None
Targets	msdyn_ocsession
Type	Lookup

msdyn_sessionparticipantId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Session participant
IsValidForForm	False

Property	Value
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_sessionparticipantid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Session participant
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Session participant
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.

Property	Value
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_agentidName
- msdyn_agentidYomiName
- msdyn_omnichannelsessionName
- OwnerIdName
- OwnerIdYomiName

- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_agentidName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_agentidYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_agentidyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_omnichannelsessionName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_omnichannelsessionname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_ocsession_sessionparticipant_nested

Added by: Active Solution Solution

See msdyn_ocsession Entity msdyn_ocsession_sessionparticipant_nested One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_skillattachmentruleitem Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - Skill Based Routing Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_skillattachmentruleitems(*msdyn_skillattachmentruleitemid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_skillattachmentruleitems See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_skillattachmentruleitems(*msdyn_skillattachmentruleitemid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_skillattachmentruleitems(*msdyn_skillattachmentruleitemid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_skillattachmentruleitems See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequ
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_skillattachmentruleitems(*msdyn_skillattachmentruleitemid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_skillattachmentruleitems(*msdyn_skillattachmentruleitemid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_skillattachmentruleitems
DisplayCollectionName	Skill Attachment Rules
DisplayName	Skill Attachment Rule
EntitySetName	msdyn_skillattachmentruleitems
IsBPFEntity	False
LogicalCollectionName	msdyn_skillattachmentruleitems
LogicalName	msdyn_skillattachmentruleitem
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_skillattachmentruleitemid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_skillattachmentruleitem

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_condition
- msdyn_description
- msdyn_expression
- msdyn_liveworkstream
- msdyn_name
- msdyn_rulejson
- msdyn_skillattachmentruleitemId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_condition

Property	Value
Description	The Skill Attachment Rule's Condition
DisplayName	Condition
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_condition
MaxLength	10000
RequiredLevel	None
Type	Memo

msdyn_description

Property	Value
Description	The Skill Attachment Rule's Description
DisplayName	Description
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	100
RequiredLevel	None
Type	String

msdyn_expression

Property	Value
Description	The Skill Attachment Rule's Expression
DisplayName	Expression
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_expression
MaxLength	10000
RequiredLevel	None
Type	Memo

msdyn_liveworkstream

Property	Value
Description	Unique identifier for Work Stream associated with Skill Attachment Rule.
DisplayName	Work Stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstream
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream

Property	Value
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_rulejson

Property	Value
Description	The Skill Attachment Rule's output
DisplayName	Rule Json
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_rulejson
MaxLength	10000
RequiredLevel	None
Type	Memo

msdyn_skillattachmentruleitemId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Skill Attachment Rule
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_skillattachmentruleitemid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Skill Attachment Rule
DisplayName	Status
IsValidForCreate	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Skill Attachment Rule
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkstreamName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

msdyn_skillattachmentruleitem_target

Same as msdyn_skillattachmenttarget entity msdyn_skillattachmentruleitem_target Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_skillattachmenttarget
ReferencingAttribute	msdyn_skillattachmentruleitemid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_skillattachmentruleitem_target
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_skillattachmentruleitem_createdby
- lk_msdyn_skillattachmentruleitem_createdonbehalfby
- lk_msdyn_skillattachmentruleitem_modifiedby
- lk_msdyn_skillattachmentruleitem_modifiedonbehalfby
- user_msdyn_skillattachmentruleitem

lk_msdyn_skillattachmentruleitem_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_skillattachmentruleitem_createdby One-To-Many relationship.

lk_msdyn_skillattachmentruleitem_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_skillattachmentruleitem_createdonbehalfby One-To-Many relationship.

lk_msdyn_skillattachmentruleitem_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_skillattachmentruleitem_modifiedby One-To-Many relationship.

lk_msdyn_skillattachmentruleitem_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_skillattachmentruleitem_modifiedonbehalfby One-To-Many relationship.

user_msdyn_skillattachmentruleitem

Added by: System Solution Solution

See systemuser Entity user_msdyn_skillattachmentruleitem One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_skillattachmenttarget Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Omnichannel - Skill Based Routing Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_skillattachmenttargets(*msdyn_skillattachmenttargetid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_skillattachmenttargets See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_skillattachmenttargets(*msdyn_skillattachmenttargetid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_skillattachmenttargets(*msdyn_skillattachmenttargetid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_skillattachmenttargets See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_skillattachmenttargets(*msdyn_skillattachmenttargetid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_skillattachmenttargets(*msdyn_skillattachmenttargetid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_skillattachmenttargets
DisplayCollectionName	Attach Skills
DisplayName	Attach Skill
EntitySetName	msdyn_skillattachmenttargets
IsBPFEntity	False
LogicalCollectionName	msdyn_skillattachmenttargets
LogicalName	msdyn_skillattachmenttarget
OwnershipType	UserOwned

Property	Value
PrimaryIdAttribute	msdyn_skillattachmenttargetid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_skillattachmenttarget

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_characteristicid
- msdyn_name
- msdyn_ratingvalueid
- msdyn_skillattachmentruleitemid
- msdyn_skillattachmenttargetId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_characteristicid

Property	Value
Description	Unique identifier for Characteristic associated with Skill Attachment Target.
DisplayName	Name
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_characteristicid
RequiredLevel	ApplicationRequired
Targets	characteristic
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_ratingvalueid

Property	Value
Description	Unique identifier for Rating Value associated with Skill Attachment Target.
DisplayName	Rating value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ratingvalueid
RequiredLevel	None
Targets	ratingvalue
Type	Lookup

msdyn_skillattachmentruleitemid

Property	Value
Description	Unique identifier for Skill Attachment Rule associated with Attach Skill.
DisplayName	Skill Attachment Rule Item
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_skillattachmentruleitemid
RequiredLevel	None
Targets	msdyn_skillattachmentruleitem
Type	Lookup

msdyn_skillattachmenttargetId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Skill Attachment Target

Property	Value
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_skillattachmenttargetid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Skill Attachment Target
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Skill Attachment Target
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number

Property	Value
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_characteristicidName
- msdyn_ratingvalueidName
- msdyn_skillattachmentruleitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_characteristicidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_characteristicidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_ratingvalueidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ratingvalueidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_skillattachmentruleitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_skillattachmentruleitemidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.

Property	Value
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_skillattachmenttarget_createdby
- lk_msdyn_skillattachmenttarget_createdonbehalfby
- lk_msdyn_skillattachmenttarget_modifiedby
- lk_msdyn_skillattachmenttarget_modifiedonbehalfby
- user_msdyn_skillattachmenttarget
- msdyn_skillattachmentruleitem_target

lk_msdyn_skillattachmenttarget_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_skillattachmenttarget_createdby One-To-Many relationship.

lk_msdyn_skillattachmenttarget_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_skillattachmenttarget_createdonbehalfby One-To-Many relationship.

lk_msdyn_skillattachmenttarget_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_skillattachmenttarget_modifiedby One-To-Many relationship.

lk_msdyn_skillattachmenttarget_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_skillattachmenttarget_modifiedonbehalfby One-To-Many relationship.

user_msdyn_skillattachmenttarget

Added by: System Solution Solution

See systemuser Entity user_msdyn_skillattachmenttarget One-To-Many relationship.

msdyn_skillattachmentruleitem_target

See msdyn_skillattachmentruleitem Entity msdyn_skillattachmentruleitem_target One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_smsengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores context values for SMS

Added by: Omnichannel – SMS Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_smsengagementctxes(*msdyn_smsengagementctxid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_smsengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_smsengagementctxes(*msdyn_smsengagementctxid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_smsengagementctxes(*msdyn_smsengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_smsengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_smsengagementctxes(*msdyn_smsengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_smsengagementctxes(*msdyn_smsengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_smsengagementctxes
DisplayCollectionName	SMS Engagement Contexts
DisplayName	SMS Engagement Context
EntitySetName	msdyn_smsengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_smsengagementctxes

Property	Value
LogicalName	msdyn_smsengagementctx
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_smsengagementctxid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_smsengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_countrycode
- msdyn_customerphonenumber
- msdyn_liveworkitemid
- msdyn_name
- msdyn_orgphonenumber
- msdyn_smsengagementctxId
- msdyn_smsengagementid
- msdyn_smsprovider
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_countrycode

Property	Value
Description	Country code of the customer's (C2) phone number. For instance, US will be "1", India will be "91"
DisplayName	Country code
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_countrycode
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customerphonenumber

Property	Value
Description	Phone number of the customer (C2)
DisplayName	Customer Phone Number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerphonenumber
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique identifier for Conversation associated with SMS Engagement Context.
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_orgphonenumber

Property	Value
Description	Phone number of the organization (C1)
DisplayName	Organization Phone Number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_orgphonenumber
MaxLength	100
RequiredLevel	None
Type	String

msdyn_smsengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	SMS Engagement Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_smsengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_smsengagementid

Property	Value
Description	Engagement ID for the SMS context
DisplayName	SMS Engagement Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_smsengagementid

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_smsprovider

Added by: Omnichannel - SMS Patch Solution

Property	Value
Description	SMS Provider
DisplayName	SMS Provider
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_smsprovider
RequiredLevel	None
Type	Picklist

msdyn_smsprovider Options

Value	Label
192350000	TeleSign
192350001	Twilio

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the SMS Engagement Context
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the SMS Engagement Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName

- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_ocliveworkitem_msdyn_smsengagementctx_liveworkitemid

Added by: Active Solution Solution

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_smsnumber Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores information about the properties of SMS support number configured to send and receive text messages

Added by: Omnichannel – SMS Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_smsnumbers(*msdyn_smsnumberid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_smsnumbers See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_smsnumbers(*msdyn_smsnumberid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_smsnumbers(*msdyn_smsnumberid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_smsnumbers See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_smsnumbers(*msdyn_smsnumberid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_smsnumbers(*msdyn_smsnumberid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_smsnumbers
DisplayCollectionName	SMS Numbers
DisplayName	SMS Number

Property	Value
EntitySetName	msdyn_smsnumbers
IsBPFEntity	False
LogicalCollectionName	msdyn_smsnumbers
LogicalName	msdyn_smsnumber
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_smsnumberid
PrimaryNameAttribute	msdyn_number
SchemaName	msdyn_smsnumber

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_Description
- msdyn_FormattedPhoneNumber
- msdyn_LiveWorkStreamId
- msdyn_number
- msdyn_operatinghourid
- msdyn_Provider
- msdyn_smsnumberId
- msdyn_Type
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None

Property	Value
Type	Integer

msdyn_Description

Property	Value
Description	SMS number description
DisplayName	Description
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_description
MaxLength	500
RequiredLevel	None
Type	String

msdyn_FormattedPhoneNumber

Property	Value
Description	Readable field to display SMS phone number
DisplayName	Formatted Phone Number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_formattedphonenumber
MaxLength	100
RequiredLevel	None
Type	String

msdyn_LiveWorkStreamId

Property	Value
Description	Unique identifier for Work Stream associated with SMS Number.
DisplayName	Work Stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid

Property	Value
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_number

Property	Value
Description	The SMS number of the SMS entity.
DisplayName	Number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_number
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_operatinghourid

Added by: Omnichannel - SMS Patch Solution

Property	Value
Description	Used to denote operating hours for the sms numbers record
DisplayName	Operating Hours
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_operatinghourid
RequiredLevel	None
Targets	msdyn_operatinghour
Type	Lookup

msdyn_Provider

Property	Value
Description	SMS Provider for number
DisplayName	DEPRECATED_Provider
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_provider
RequiredLevel	None
Type	Picklist

msdyn_Provider Options

Value	Label
192350000	TeleSign App

msdyn_smsnumberId

Property	Value
Description	Unique identifier for entity instances
DisplayName	SMS Number
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_smsnumberid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_Type

Property	Value
Description	The SMS number type
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
RequiredLevel	None
Type	Picklist

msdyn_Type Options

Value	Label
192350000	Long code
192350001	Short code
192350002	Toll free

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the SMS Number
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the SMS Number
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_LiveWorkStreamIdName
- msdyn_operatinghouridName
- OwnerIdName
- OwnerIdYomiName

- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_LiveWorkStreamIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_operatinghouridName

Added by: Omnichannel - SMS Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_operatinghouridname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record

Property	Value
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_soundfile Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Entity to store all audio files for Omnichannel

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_soundfiles See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_soundfiles(*msdyn_soundfileid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_soundfiles(*msdyn_soundfileid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_soundfiles See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_soundfiles(*msdyn_soundfileid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_soundfiles(*msdyn_soundfileid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_soundfiles

Property	Value
DisplayCollectionName	Audio Files
DisplayName	Audio File
EntitySetName	msdyn_soundfiles
IsBPFEntity	False
LogicalCollectionName	msdyn_soundfiles
LogicalName	msdyn_soundfile
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_soundfileid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_soundfile

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_Name
- msdyn_soundfileId
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True

Property	Value
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_Name

Property	Value
Description	Audio file name
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_soundfileId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Audio File
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	msdyn_soundfileid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Audio File
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Audio File
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber

Property	Value
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName

- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_Uploadsoundfile_Name
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon

Property	Value
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_Uploadsoundfile_Name

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_uploadsoundfile_name
MaxLength	200
RequiredLevel	None
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_soundfile_SyncErrors
- msdyn_soundfile_DuplicateMatchingRecord
- msdyn_soundfile_DuplicateBaseRecord

- msdyn_soundfile_AsyncOperations
- msdyn_soundfile_MailboxTrackingFolders
- msdyn_soundfile_ProcessSession
- msdyn_soundfile_BulkDeleteFailures
- msdyn_soundfile_PrincipalObjectAttributeAccesses
- msdyn_soundfile_Annotations
- msdyn_soundnotificationsetting_linksoundf
- msdyn_Personalsoundsetting_msdyn_linksoun

msdyn_soundfile_SyncErrors

Added by: System Solution Solution

Same as syncerror entity msdyn_soundfile_SyncErrors Many-To-One relationship.

Property	Value
ReferencingEntity	syncerror
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_SyncErrors
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundfile_DuplicateMatchingRecord

Added by: System Solution Solution

Same as duplicaterecord entity msdyn_soundfile_DuplicateMatchingRecord Many-To-One relationship.

Property	Value

Property	Value
ReferencingEntity	duplicaterecord
ReferencingAttribute	duplicaterecordid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_DuplicateMatchingRecord
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundfile_DuplicateBaseRecord

Added by: System Solution Solution

Same as duplicaterecord entity msdyn_soundfile_DuplicateBaseRecord Many-To-One relationship.

Property	Value
ReferencingEntity	duplicaterecord
ReferencingAttribute	baserecordid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_DuplicateBaseRecord
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundfile_AsyncOperations

Added by: System Solution Solution

Same as asyncoperation entity msdyn_soundfile_AsyncOperations Many-To-One relationship.

Property	Value
ReferencingEntity	asyncoperation
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_AsyncOperations
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundfile_MailboxTrackingFolders

Added by: System Solution Solution

Same as mailboxtrackingfolder entity msdyn_soundfile_MailboxTrackingFolders Many-To-One relationship.

Property	Value
ReferencingEntity	mailboxtrackingfolder

Property	Value
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_MailboxTrackingFolders
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundfile_ProcessSession

Added by: System Solution Solution

Same as processsession entity [msdyn_soundfile_ProcessSession]#BKMK_msdyn_soundfile_ProcessSession) Many-To-One relationship.

Property	Value
ReferencingEntity	processsession
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_ProcessSession
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundfile_BulkDeleteFailures

Added by: System Solution Solution

Same as bulkdeletefailure entity msdyn_soundfile_BulkDeleteFailures Many-To-One relationship.

Property	Value
ReferencingEntity	bulkdeletefailure
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_BulkDeleteFailures
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundfile_PrincipalObjectAttributeAccesses

Added by: System Solution Solution

Same as principalobjectattributeaccess entity msdyn_soundfile_PrincipalObjectAttributeAccesses Many-To-One relationship.

Property	Value

Property	Value
ReferencingEntity	principalobjectattributeaccess
ReferencingAttribute	objectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_PrincipalObjectAttributeAccesses
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundfile_Annotations

Added by: System Solution Solution

Same as annotation entity msdyn_soundfile_Annotations Many-To-One relationship.

Property	Value
ReferencingEntity	annotation
ReferencingAttribute	objectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundfile_Annotations
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_linksoundf

Same as msdyn_soundnotificationsetting entity msdyn_soundnotificationsetting_linksoundf Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_soundnotificationsetting
ReferencingAttribute	msdyn_linksoundfile
IsHierarchical	False
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_linksoundf
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_Personalsoundsetting_msdyn_linksoun

Same as msdyn_personalsoundsetting entity msdyn_Personalsoundsetting_msdyn_linksoun Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_personalsoundsetting
ReferencingAttribute	msdyn_linksoundfile
IsHierarchical	False

Property	Value
IsCustomizable	False
ReferencedEntityNavigationPropertyName	msdyn_Personalsoundsetting_msdyn_linksoun
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_soundfile_createdby
- lk_msdyn_soundfile_createdonbehalfby
- lk_msdyn_soundfile_modifiedby
- lk_msdyn_soundfile_modifiedonbehalfby
- organization_msdyn_soundfile

lk_msdyn_soundfile_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_soundfile_createdby One-To-Many relationship.

lk_msdyn_soundfile_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_soundfile_createdonbehalfby One-To-Many relationship.

lk_msdyn_soundfile_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_soundfile_modifiedby One-To-Many relationship.

lk_msdyn_soundfile_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_soundfile_modifiedonbehalfby One-To-Many relationship.

organization_msdyn_soundfile

Added by: System Solution Solution

See organization Entity organization_msdyn_soundfile One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_soundnotificationsetting Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Entity to store the sound notification setting records for channels and other scenarios.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_soundnotificationsettings(*msdyn_soundnotificationsettingid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_soundnotificationsettings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_soundnotificationsettings(*msdyn_soundnotificationsettingid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_soundnotificationsettings(*msdyn_soundnotificationsettingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_soundnotificationsettings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReq
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_soundnotificationsettings(*msdyn_soundnotificationsettingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_soundnotificationsettings(*msdyn_soundnotificationsettingid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_soundnotificationsettings
DisplayCollectionName	Sound notification settings
DisplayName	Sound notification setting
EntitySetName	msdyn_soundnotificationsettings
IsBPFEntity	False
LogicalCollectionName	msdyn_soundnotificationsettings
LogicalName	msdyn_soundnotificationsetting

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_soundnotificationsettingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_soundnotificationsetting

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_enablesound
- msdyn_isdefaultrecord
- msdyn_linkchannel
- msdyn_linksoundfile
- msdyn_loopsound
- msdyn_Name
- msdyn_soundnotificationsettingId
- msdyn_volume
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_enablesound

Property	Value
Description	Enable sound for this scenario
DisplayName	Enable Sound
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_enablesound

Property	Value
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_enablesound Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_isdefaultrecord

Property	Value
Description	Is this the default record? To be used for OOB settings.
DisplayName	Is default record
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isdefaultrecord
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_isdefaultrecord Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_linkchannel

Property	Value
Description	Which channel is this sound record for?
DisplayName	Link to channel
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_linkchannel
MaxLength	100
RequiredLevel	None
Type	String

msdyn_linksoundfile

Property	Value
Description	Use this field to link the sound file with the sound setting record
DisplayName	Link sound file
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_linksoundfile
RequiredLevel	None
Targets	msdyn_soundfile
Type	Lookup

msdyn_loopsound

Property	Value
Description	Use this field to play the sound till notification timeout. For incoming message, set it to No.
DisplayName	Loop Sound
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_loopsound
RequiredLevel	None
Type	Boolean

msdyn_loopsound Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_Name

Property	Value
Description	Required name field
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_soundnotificationsettingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Sound notification setting
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_soundnotificationsettingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_volume

Property	Value
Description	Volume for the corresponding channel
DisplayName	Volume
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_volume
MaxValue	100
MinValue	0
RequiredLevel	ApplicationRequired
Type	Integer

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id

Property	Value
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Sound notification setting
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Sound notification setting
DisplayName	Status Reason

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy

- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_linksoundfileName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_linksoundfileName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_linksoundfilename
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn_soundnotificationsetting_SyncErrors
- msdyn_soundnotificationsetting_DuplicateMatchingRecord
- msdyn_soundnotificationsetting_DuplicateBaseRecord
- msdyn_soundnotificationsetting_AsyncOperations
- msdyn_soundnotificationsetting_MailboxTrackingFolders
- msdyn_soundnotificationsetting_ProcessSession
- msdyn_soundnotificationsetting_BulkDeleteFailures
- msdyn_soundnotificationsetting_PrincipalObjectAttributeAccesses
- msdyn_soundnotificationsetting_Annotations

msdyn_soundnotificationsetting_SyncErrors

Added by: System Solution Solution

Same as syncerror entity msdyn_soundnotificationsetting_SyncErrors Many-To-One relationship.

Property	Value
ReferencingEntity	syncerror
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_SyncErrors
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_DuplicateMatchingRecord

Added by: System Solution Solution

Same as duplicaterecord entity msdyn_soundnotificationsetting_DuplicateMatchingRecord Many-To-One relationship.

Property	Value
ReferencingEntity	duplicaterecord
ReferencingAttribute	duplicaterecordid

Property	Value
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_DuplicateMatchingRecord
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_DuplicateBaseRecord

Added by: System Solution Solution

Same as duplicaterecord entity msdyn_soundnotificationsetting_DuplicateBaseRecord Many-To-One relationship.

Property	Value
ReferencingEntity	duplicaterecord
ReferencingAttribute	baserecordid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_DuplicateBaseRecord
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_AsyncOperations

Added by: System Solution Solution

Same as asyncoperation entity msdyn_soundnotificationsetting_AsyncOperations Many-To-One relationship.

Property	Value
ReferencingEntity	asyncoperation
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_AsyncOperations
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_MailboxTrackingFolders

Added by: System Solution Solution

Same as mailboxtrackingfolder entity msdyn_soundnotificationsetting_MailboxTrackingFolders Many-To-One relationship.

Property	Value
ReferencingEntity	mailboxtrackingfolder
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_MailboxTrackingFolders
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_ProcessSession

Added by: System Solution Solution

Same as processsession entity msdyn_soundnotificationsetting_ProcessSession Many-To-One relationship.

Property	Value
ReferencingEntity	processsession
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_ProcessSession
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_BulkDeleteFailures

Added by: System Solution Solution

Same as bulkdeletefailure entity msdyn_soundnotificationsetting_BulkDeleteFailures Many-To-One relationship.

Property	Value
ReferencingEntity	bulkdeletefailure
ReferencingAttribute	regardingobjectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_BulkDeleteFailures
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_PrincipalObjectAttributeAccesses

Added by: System Solution Solution

Same as principalobjectattributeaccess entity msdyn_soundnotificationsetting_PrincipalObjectAttributeAccesses Many-To-One relationship.

Property	Value
ReferencingEntity	principalobjectattributeaccess
ReferencingAttribute	objectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_PrincipalObjectAttributeAccesses
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: Cascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_soundnotificationsetting_Annotations

Added by: System Solution Solution

Same as annotation entity msdyn_soundnotificationsetting_Annotations Many-To-One relationship.

Property	Value
ReferencingEntity	annotation
ReferencingAttribute	objectid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_soundnotificationsetting_Annotations

Property	Value
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: Cascade Delete: Cascade Merge: NoCascade Reparent: Cascade Share: Cascade Unshare: Cascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_soundnotificationsetting_createdby
- lk_msdyn_soundnotificationsetting_createdonbehalfby
- lk_msdyn_soundnotificationsetting_modifiedby
- lk_msdyn_soundnotificationsetting_modifiedonbehalfby
- user_msdyn_soundnotificationsetting
- team_msdyn_soundnotificationsetting
- business_unit_msdyn_soundnotificationsetting
- msdyn_soundnotificationsetting_linksoundf

lk_msdyn_soundnotificationsetting_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_soundnotificationsetting_createdby One-To-Many relationship.

lk_msdyn_soundnotificationsetting_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_soundnotificationsetting_createdonbehalfby One-To-Many relationship.

lk_msdyn_soundnotificationsetting_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_soundnotificationsetting_modifiedby One-To-Many relationship.

lk_msdyn_soundnotificationsetting_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_soundnotificationsetting_modifiedonbehalfby One-To-Many relationship.

user_msdyn_soundnotificationsetting

Added by: System Solution Solution

See systemuser Entity user_msdyn_soundnotificationsetting One-To-Many relationship.

team_msdyn_soundnotificationsetting

Added by: System Solution Solution

See team Entity team_msdyn_soundnotificationsetting One-To-Many relationship.

business_unit_msdyn_soundnotificationsetting

Added by: System Solution Solution

See businessunit Entity business_unit_msdyn_soundnotificationsetting One-To-Many relationship.

msdyn_soundnotificationsetting_linksoundf

See msdyn_soundfile Entity msdyn_soundnotificationsetting_linksoundf One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_surveyquestion Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

A library of all survey questions in a work stream

Added by: Omnichannel – Chat Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_surveyquestions(*msdyn_surveyquestionid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_surveyquestions See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_surveyquestions(*msdyn_surveyquestionid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_surveyquestions(*msdyn_surveyquestionid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_surveyquestions See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_surveyquestions(*msdyn_surveyquestionid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_surveyquestions(*msdyn_surveyquestionid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_surveyquestions
DisplayCollectionName	Survey Questions
DisplayName	Survey Question
EntitySetName	msdyn_surveyquestions

Property	Value
IsBPFEntity	False
LogicalCollectionName	msdyn_surveyquestions
LogicalName	msdyn_surveyquestion
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_surveyquestionid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_surveyquestion

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_AnswerType
- msdyn_LiveWorkStreamToChatQuestion
- msdyn_name
- msdyn_PlaceholderText
- msdyn_QuestionText
- msdyn_RatingScale
- msdyn_surveyquestionId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_AnswerType

Property	Value
Description	Type of survey answer
DisplayName	Answer type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_answertype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_AnswerType Options

Value	Label
192350000	Single line
192350001	Multiple lines
192350002	Option set
192350003	Rating
192350004	User Consent

msdyn_LiveWorkStreamToChatQuestion

Property	Value
Description	Unique identifier for Work stream associated with Chat Question.
DisplayName	Work stream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamtochatquestion
RequiredLevel	ApplicationRequired
Targets	msdyn_liveworkstream
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Question name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100

Property	Value
RequiredLevel	ApplicationRequired
Type	String

msdyn_PlaceholderText

Property	Value
Description	Help text for the survey question
DisplayName	Help Text
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_placeholdertext
MaxLength	100
RequiredLevel	None
Type	String

msdyn_QuestionText

Property	Value
Description	Question text
DisplayName	Question text
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_questiontext
MaxLength	512
RequiredLevel	ApplicationRequired
Type	String

msdyn_RatingScale

Property	Value
Description	Rating scale of the question
DisplayName	Rating Scale
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ratingscale

Property	Value
MaxValue	10
MinValue	2
RequiredLevel	None
Type	Integer

msdyn_surveyquestionId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Survey Question
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_surveyquestionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid

Property	Value
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Survey Question
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Survey Question
DisplayName	Status Reason
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_LiveWorkStreamToChatQuestionName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_LiveWorkStreamToChatQuestionName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamtochatquestionname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

- msdyn__surveyquestion_msdyn_localizedsurveyques
- msdyn_msdyn_surveyquestion_msdyn_chatquestionnaireresponseitem
- msdyn_msdyn_surveyquestion_msdyn_questionsequence_SurveyQuestion

msdyn__surveyquestion_msdyn_localizedsurveyques

Same as msdyn_localizedsurveyquestion entity msdyn__surveyquestion_msdyn_localizedsurveyques Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_localizedsurveyquestion
ReferencingAttribute	msdyn_surveyquestionid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn__surveyquestion_msdyn_localizedsurveyques
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_surveyquestion_msdyn_chatquestionnaireresponseitem

Same as msdyn_chatquestionnaireresponseitem entity msdyn_msdyn_surveyquestion_msdyn_chatquestionnaireresponseitem Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_chatquestionnaireresponseitem
ReferencingAttribute	msdyn_surveyquestionid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_surveyquestion_msdyn_chatquestionnaireresponseitem
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

msdyn_msdyn_surveyquestion_msdyn_questionsequence_SurveyQuestion

Same as msdyn_questionsequence entity msdyn_msdyn_surveyquestion_msdyn_questionsequence_SurveyQuestion Many-To-One relationship.

Property	Value
ReferencingEntity	msdyn_questionsequence
ReferencingAttribute	msdyn_surveyquestion
IsHierarchical	False

Property	Value
IsCustomizable	True
ReferencedEntityNavigationPropertyName	msdyn_msdyn_surveyquestion_msdyn_questionsequence_SurveyQuestion
AssociatedMenuConfiguration	Behavior: UseCollectionName Group: Details Label: Order: 10000
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_systemuser_msdyn_omnichannelqueue Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> This entity has been deprecated. It will still be visible in the **$metadata** document of your environment but using it to access Microsoft Dataverse data is not supported.

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_systemuser_msdyn_omnichannelqueueset See Query Data	RetrieveMultipleRequest or RetrieveMultiple

Entity Properties

Property	Value
CollectionSchemaName	
DisplayCollectionName	
DisplayName	
EntitySetName	msdyn_systemuser_msdyn_omnichannelqueueset
IsBPFEntity	False
LogicalCollectionName	
LogicalName	msdyn_systemuser_msdyn_omnichannelqueue
OwnershipType	None

Property	Value
PrimaryIdAttribute	msdyn_systemuser_msdyn_omnichannelqueueid
PrimaryNameAttribute	
SchemaName	msdyn_systemuser_msdyn_omnichannelqueue

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- msdyn_omnichannelqueueid
- msdyn_systemuser_msdyn_omnichannelqueueId
- systemuserid
- VersionNumber

msdyn_omnichannelqueueid

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_omnichannelqueueid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_systemuser_msdyn_omnichannelqueueId

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_systemuser_msdyn_omnichannelqueueid

Property	Value
RequiredLevel	SystemRequired
Type	Uniqueidentifier

systemuserid

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	systemuserid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service

Developer guide for Omnichannel for Customer Service

msdyn_teamsengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Teams Engagement Context

Added by: Omnichannel - Teams Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_teamsengagementctxs(*msdyn_teamsengagementctxid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_teamsengagementctxs See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_teamsengagementctxs(*msdyn_teamsengagementctxid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_teamsengagementctxs(*msdyn_teamsengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_teamsengagementctxs See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_teamsengagementctxs(*msdyn_teamsengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_teamsengagementctxs(*msdyn_teamsengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_teamsengagementctxes
DisplayCollectionName	Teams Engagement Contexts
DisplayName	Teams Engagement Context
EntitySetName	msdyn_teamsengagementctxs
IsBPFEntity	False
LogicalCollectionName	msdyn_teamsengagementctxes
LogicalName	msdyn_teamsengagementctx

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_teamsengagementctxid
PrimaryNameAttribute	msdyn_customername
SchemaName	msdyn_teamsengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_customerfirstname
- msdyn_customerid
- msdyn_customerlastname
- msdyn_customername
- msdyn_email
- msdyn_liveworkitemid
- msdyn_name
- msdyn_teamsengagementctxId
- msdyn_teamsengagementid
- msdyn_userprinicipalname
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_customerfirstname

Property	Value
Description	First name of the customer
DisplayName	Customer First Name
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerfirstname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customerid

Property	Value
Description	Unique identifier of customer
DisplayName	Customer Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customerlastname

Property	Value
Description	Last name of the customer
DisplayName	Customer Last Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerlastname
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customername

Property	Value
Description	Full name of the customer
DisplayName	Customer Name
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_email

Property	Value
Description	Customer Email
DisplayName	Email
FormatName	Email
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_email
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique identifier for Conversation associated with Teams Engagement Context
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name

Property	Value
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_teamsengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Teams Engagement Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_teamsengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_teamsengagementid

Property	Value
Description	Teams Engagement Id
DisplayName	Teams Engagement Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_teamsengagementid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_userprinicipalname

Property	Value
Description	User Prinicipal Name
DisplayName	User Prinicipal Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_userprinicipalname
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Teams Engagement Context
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Teams Engagement Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon

Property	Value
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_teamsengagementctx_createdby
- lk_msdyn_teamsengagementctx_createdonbehalfby
- lk_msdyn_teamsengagementctx_modifiedby
- lk_msdyn_teamsengagementctx_modifiedonbehalfby
- user_msdyn_teamsengagementctx

lk_msdyn_teamsengagementctx_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_teamsengagementctx_createdby One-To-Many relationship.

lk_msdyn_teamsengagementctx_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_teamsengagementctx_createdonbehalfby One-To-Many relationship.

lk_msdyn_teamsengagementctx_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_teamsengagementctx_modifiedby One-To-Many relationship.

lk_msdyn_teamsengagementctx_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_teamsengagementctx_modifiedonbehalfby One-To-Many relationship.

user_msdyn_teamsengagementctx

Added by: System Solution Solution

See systemuser Entity user_msdyn_teamsengagementctx One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_transcript Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores the transcript of the communication between the user and the customer

Added by: Omnichannel – Base Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_transcripts(*msdyn_transcriptid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_transcripts See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_transcripts(*msdyn_transcriptid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_transcripts(*msdyn_transcriptid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_transcripts See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_transcripts(*msdyn_transcriptid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_transcripts(*msdyn_transcriptid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_transcripts
DisplayCollectionName	Transcripts

Property	Value
DisplayName	Transcript
EntitySetName	msdyn_transcripts
IsBPFEntity	False
LogicalCollectionName	msdyn_transcripts
LogicalName	msdyn_transcript
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_transcriptid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_transcript

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_LiveWorkItemIdId
- msdyn_name
- msdyn_transcriptId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_LiveWorkItemIdId

Property	Value
Description	LiveWorkItem this Transcript belongs to
DisplayName	LiveWorkItemId
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemidid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_transcriptId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Transcript
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_transcriptid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Transcript
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Transcript
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number

Property	Value
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_LiveWorkItemIdIdName

- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_LiveWorkItemIdIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemididname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None

Property	Value
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_ocliveworkitem_msdyn_transcript

Added by: Active Solution Solution

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_unifiedroutingdiagnostic Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The entity used to store unified routing diagnostic data.

Added by: Dynamics 365 UR Decision Engine Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_unifiedroutingdiagnostics(*msdyn_unifiedroutingdiagnosticid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_unifiedroutingdiagnostics See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_unifiedroutingdiagnostics(*msdyn_unifiedroutingdiagnosticid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_unifiedroutingdiagnostics(*msdyn_unifiedroutingdiagnosticid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_unifiedroutingdiagnostics See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReq
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_unifiedroutingdiagnostics(*msdyn_unifiedroutingdiagnosticid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_unifiedroutingdiagnostics(*msdyn_unifiedroutingdiagnosticid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_unifiedroutingdiagnostics
DisplayCollectionName	Unified routing diagnostics
DisplayName	Unified routing diagnostic
EntitySetName	msdyn_unifiedroutingdiagnostics
IsBPFEntity	False
LogicalCollectionName	msdyn_unifiedroutingdiagnostics
LogicalName	msdyn_unifiedroutingdiagnostic

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_unifiedroutingdiagnosticid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_unifiedroutingdiagnostic

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_completedon
- msdyn_decisionrulesetid
- msdyn_evaluation
- msdyn_inputdata
- msdyn_name
- msdyn_ocliveworkitemid
- msdyn_outputdata
- msdyn_ruletype
- msdyn_sequencenumber
- msdyn_startedon
- msdyn_targetobject
- msdyn_targetobjectIdType
- msdyn_unifiedroutingdiagnosticId
- msdyn_unifiedroutingrunid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_completedon

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the rule execution was completed.
DisplayName	Completed On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_completedon
RequiredLevel	None
Type	DateTime

msdyn_decisionrulesetid

Property	Value
Description	Unique identifier for Decision rule set associated with unifiedroutingdiagnostic.
DisplayName	Decision Rule Set Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_decisionrulesetid
RequiredLevel	None
Targets	msdyn_decisionruleset
Type	Lookup

msdyn_evaluation

Property	Value
Description	Evaluation
DisplayName	Evaluation
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_evaluation
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_inputdata

Property	Value
Description	Input data
DisplayName	Input Data
Format	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_inputdata
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_name

Property	Value
Description	Name of the unifiedroutingdiagnostic record
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	200
RequiredLevel	None
Type	String

msdyn_ocliveworkitemid

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Unique identifier for Conversation associated with unifiedroutingdiagnostic.
DisplayName	Work item
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_outputdata

Property	Value
Description	Output data
DisplayName	Output Data
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_outputdata

Property	Value
MaxLength	1048576
RequiredLevel	None
Type	Memo

msdyn_ruletype

Property	Value
Description	Rule type
DisplayName	Rule Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ruletype
RequiredLevel	None
Type	Picklist

msdyn_ruletype Options

Value	Label
1	Demand Classification
2	Route To Queue
3	Skill Identification
4	ML
5	Prioritization
6	Assignment
9	Assignment Selection Criteria
11	Intake

msdyn_sequencenumber

Property	Value
Description	Sequence number
DisplayName	Sequence Number
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_sequencenumber
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_startedon

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the rule execution was started.
DisplayName	Started On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_startedon
RequiredLevel	None
Type	DateTime

msdyn_targetobject

Property	Value
Description	Unique identifier for the target object associated with unifiedroutingdiagnostic.
DisplayName	Target Object
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_targetobject
RequiredLevel	None
Targets	adx_inviteredemption,email,incident,msdyn_ocliveworkitem,queueitem
Type	Lookup

msdyn_targetobjectIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_targetobjectidtype
RequiredLevel	None
Type	EntityName

msdyn_unifiedroutingdiagnosticId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Unified Routing Diagnostic
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_unifiedroutingdiagnosticid

Property	Value
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_unifiedroutingrunid

Property	Value
Description	Unique identifier for Unified routing run associated with Unified routing diagnostic.
DisplayName	unified routing run wrapper
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_unifiedroutingrunid
RequiredLevel	None
Targets	msdyn_unifiedroutingrun
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the unifiedroutingdiagnostic
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the unifiedroutingdiagnostic
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_decisionrulesetidName
- msdyn_ocliveworkitemidName
- msdyn_targetobjectName
- msdyn_targetobjectYomiName

- msdyn_unifiedroutingrunidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_decisionrulesetidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	msdyn_decisionrulesetidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_ocliveworkitemidName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_targetobjectName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_targetobjectname
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_targetobjectYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	msdyn_targetobjectyominame
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_unifiedroutingrunidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_unifiedroutingrunidname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_unifiedroutingrun Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Added by: Dynamics 365 UR Decision Engine Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_unifiedroutingruns(*msdyn_unifiedroutingrunid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_unifiedroutingruns See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_unifiedroutingruns(*msdyn_unifiedroutingrunid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_unifiedroutingruns(*msdyn_unifiedroutingrunid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_unifiedroutingruns See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_unifiedroutingruns(*msdyn_unifiedroutingrunid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_unifiedroutingruns(*msdyn_unifiedroutingrunid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_unifiedroutingruns
DisplayCollectionName	Unified Routing Runs
DisplayName	Unified routing run
EntitySetName	msdyn_unifiedroutingruns
IsBPFEntity	False
LogicalCollectionName	msdyn_unifiedroutingruns

Property	Value
LogicalName	msdyn_unifiedroutingrun
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_unifiedroutingrunid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_unifiedroutingrun

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_assignedagent
- msdyn_endtime
- msdyn_liveworkitem
- msdyn_name
- msdyn_queue
- msdyn_routingduration
- msdyn_routingstatus
- msdyn_runnumber
- msdyn_starttime
- msdyn_targetobject
- msdyn_targetobjectIdType
- msdyn_unifiedroutingrunId
- msdyn_workstream
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_assignedagent

Property	Value
Description	
DisplayName	Assigned agent
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_assignedagent
RequiredLevel	None
Targets	systemuser
Type	Lookup

msdyn_endtime

Property	Value
DateTimeBehavior	UserLocal
Description	
DisplayName	End time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_endtime
RequiredLevel	None
Type	DateTime

msdyn_liveworkitem

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	Work item
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitem
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The diagnostic item.
DisplayName	Diagnostic item
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_queue

Property	Value
Description	
DisplayName	Queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queue
RequiredLevel	None
Targets	queue
Type	Lookup

msdyn_routingduration

Property	Value
Description	
DisplayName	Routing duration
Format	Duration
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_routingduration
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_routingstatus

Property	Value
Description	
DisplayName	Routing status
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	msdyn_routingstatus
RequiredLevel	None
Type	Picklist

msdyn_routingstatus Options

Value	Label
100000000	Intake rules - completed
100000001	Workstream: Classification rules - processing...
100000002	Workstream: Route-to-queue rules - completed
100000003	Queue: Prioritization rules - completed
100000004	Queue: Assignment selection rules - completed
100000005	Queue: Assignment rules - completed
100000006	Agent assignment - completed

msdyn_runnumber

Property	Value
Description	Run number
DisplayName	Run Number
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_runnumber
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_starttime

Property	Value
DateTimeBehavior	UserLocal
Description	
DisplayName	Routing started on
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_starttime
RequiredLevel	None
Type	DateTime

msdyn_targetobject

Property	Value
Description	Unique identifier for the target object associated with unified routing run.
DisplayName	Target Object
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_targetobject
RequiredLevel	None
Targets	adx_inviteredemption,email,incident,msdyn_ocliveworkitem,queueitem
Type	Lookup

msdyn_targetobjectIdType

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_targetobjectidtype
RequiredLevel	None
Type	EntityName

msdyn_unifiedroutingrunId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Unified routing run
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_unifiedroutingrunid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_workstream

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	Workstream

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_workstream
RequiredLevel	None
Targets	msdyn_liveworkstream
Type	Lookup

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the Unified routing run
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Unified routing run
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_assignedagentName
- msdyn_assignedagentYomiName
- msdyn_liveworkitemName
- msdyn_queueName

- msdyn_targetobjectName
- msdyn_targetobjectYomiName
- msdyn_workstreamName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_assignedagentName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_assignedagentname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_assignedagentYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_assignedagentyominame
MaxLength	200
RequiredLevel	None
Type	String

msdyn_liveworkitemName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_queueName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_queuename
MaxLength	200
RequiredLevel	None
Type	String

msdyn_targetobjectName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_targetobjectname
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_targetobjectYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_targetobjectyominame
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_workstreamName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_workstreamname
MaxLength	100
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_unifiedroutingsetuptracker Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Unified Routing Setup Trackers

Added by: Unified Routing Tracker Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_unifiedroutingsetuptrackers See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_unifiedroutingsetuptrackers(*msdyn_unifiedroutingsetuptrackerid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_unifiedroutingsetuptrackers(*msdyn_unifiedroutingsetuptrackerid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_unifiedroutingsetuptrackers See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_unifiedroutingsetuptrackers(*msdyn_unifiedroutingsetuptrackerid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_unifiedroutingsetuptrackers(*msdyn_unifiedroutingsetuptrackerid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_unifiedroutingsetuptrackers
DisplayCollectionName	Unified Routing Setup Trackers
DisplayName	Unified Routing Setup Tracker
EntitySetName	msdyn_unifiedroutingsetuptrackers
IsBPFEntity	False
LogicalCollectionName	msdyn_unifiedroutingsetuptrackers
LogicalName	msdyn_unifiedroutingsetuptracker
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_unifiedroutingsetuptrackerid
PrimaryNameAttribute	msdyn_name

Property	Value
SchemaName	msdyn_unifiedroutingsetuptracker

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_enableunifiedrouting
- msdyn_errorcode
- msdyn_errormessage
- msdyn_executionstatus
- msdyn_issuccessnotificationdisplayed
- msdyn_name
- msdyn_servicerequestid
- msdyn_token
- msdyn_transactionid
- msdyn_unifiedroutingsetuptrackerId
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_enableunifiedrouting

Property	Value
Description	
DisplayName	Enable Unified Routing
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_enableunifiedrouting
RequiredLevel	None
Type	Boolean

msdyn_enableunifiedrouting Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_errorcode

Property	Value
Description	
DisplayName	Error Code
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_errorcode
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_errormessage

Property	Value
Description	
DisplayName	Error Message
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_errormessage
MaxLength	4000
RequiredLevel	None

Property	Value
Type	String

msdyn_executionstatus

Property	Value
Description	Execution Status
DisplayName	Execution Status
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_executionstatus
RequiredLevel	None
Type	Picklist

msdyn_executionstatus Options

Value	Label
0	Started
1	Completed
2	Provisioning Started
3	Provisioning Completed
4	Deprovisioning Started
5	Deprovisioning Completed
6	Toggled
7	Record Created
8	Failed

msdyn_issuccessnotificationdisplayed

Property	Value
Description	
DisplayName	Is success notification displayed
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_issuccessnotificationdisplayed
RequiredLevel	None
Type	Boolean

msdyn_issuccessnotificationdisplayed Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_servicerequestid

Property	Value
Description	
DisplayName	Service Request Id
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_servicerequestid
MaxLength	30000
RequiredLevel	None
Type	Memo

msdyn_token

Property	Value
Description	
DisplayName	Token
Format	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_token
MaxLength	20000
RequiredLevel	None
Type	Memo

msdyn_transactionid

Property	Value
Description	
DisplayName	Transaction Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_transactionid
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_unifiedroutingsetuptrackerId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Unified Routing Setup Tracker
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_unifiedroutingsetuptrackerid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the Unified Routing Setup Tracker
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the Unified Routing Setup Tracker
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy

- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal

Property	Value
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_usersetting Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Parent entity for Omnichannel personalizations

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/msdyn_usersettings See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_usersettings(*msdyn_usersettingid*) See Delete	DeleteRequest or Delete
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_usersettings(*msdyn_usersettingid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_usersettings See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_usersettings(*msdyn_usersettingid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_usersettings(*msdyn_usersettingid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_usersettings
DisplayCollectionName	User settings

Property	Value
DisplayName	User settings
EntitySetName	msdyn_usersettings
IsBPFEntity	False
LogicalCollectionName	msdyn_usersettings
LogicalName	msdyn_usersetting
OwnershipType	OrganizationOwned
PrimaryIdAttribute	msdyn_usersettingid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_usersetting

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_name
- msdyn_personalsoundenabled
- msdyn_SoundFormControl
- msdyn_usersettingId
- OverriddenCreatedOn
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False

Property	Value
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_personalsoundenabled

Property	Value
Description	
DisplayName	Personal Sound Enabled
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_personalsoundenabled
RequiredLevel	None
Type	Boolean

msdyn_personalsoundenabled Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_SoundFormControl

Property	Value
Description	Field to host the sound form custom control
DisplayName	Sound Form Control
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_soundformcontrol
MaxLength	100
RequiredLevel	None
Type	String

msdyn_usersettingId

Property	Value
Description	Unique identifier for entity instances
DisplayName	User setting
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_usersettingid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

statecode

Property	Value
Description	Status of the User setting
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the User setting
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the organization
DisplayName	Organization Id
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	None
Targets	organization
Type	Lookup

OrganizationIdName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_usersetting_createdby
- lk_msdyn_usersetting_createdonbehalfby
- lk_msdyn_usersetting_modifiedby
- lk_msdyn_usersetting_modifiedonbehalfby

lk_msdyn_usersetting_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_usersetting_createdby One-To-Many relationship.

lk_msdyn_usersetting_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_usersetting_createdonbehalfby One-To-Many relationship.

lk_msdyn_usersetting_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_usersetting_modifiedby One-To-Many relationship.

lk_msdyn_usersetting_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_usersetting_modifiedonbehalfby One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_visitorjourney Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Stores each customer action as a record. The actions tracked are before an interaction is initiated. Agents will see the actions for an interaction in the Self Service section of the **Active Conversation** page, when enabled.

Added by: Omnichannel - Base Patch Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.1/msdyn_visitorjourneies(*msdyn_visitorjourneyid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.1/msdyn_visitorjourneies See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.1/msdyn_visitorjourneies(*msdyn_visitorjourneyid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.1/msdyn_visitorjourneies(*msdyn_visitorjourneyid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.1/msdyn_visitorjourneies See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.1/msdyn_visitorjourneies(*msdyn_visitorjourneyid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.1/msdyn_visitorjourneies(*msdyn_visitorjourneyid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_visitorjourneies
DisplayCollectionName	Self services
DisplayName	Self service

Property	Value
EntitySetName	msdyn_visitorjourneies
IsBPFEntity	False
LogicalCollectionName	msdyn_visitorjourneies
LogicalName	msdyn_visitorjourney
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_visitorjourneyid
PrimaryNameAttribute	msdyn_displaytitle
SchemaName	msdyn_visitorjourney

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_displaytitle
- msdyn_endtime
- msdyn_ocliveworkitemid
- msdyn_starttime
- msdyn_type
- msdyn_url
- msdyn_visitorjourneyId
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_displaytitle

Property	Value
Description	Display title of the user navigation record.
DisplayName	Display Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_displaytitle
MaxLength	600
RequiredLevel	ApplicationRequired
Type	String

msdyn_endtime

Property	Value
DateTimeBehavior	UserLocal
Description	Time at which the user ended the navigation.
DisplayName	End time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_endtime
RequiredLevel	None
Type	DateTime

msdyn_ocliveworkitemid

Property	Value
Description	Unique id of the conversation that is related to the user navigation.
DisplayName	Conversation id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_starttime

Property	Value
DateTimeBehavior	UserLocal
Description	Time at which the user started the navigation.
DisplayName	Start time
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_starttime
RequiredLevel	None
Type	DateTime

msdyn_type

Property	Value
Description	Type of the navigation that user performed.
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_type
RequiredLevel	None
Type	Picklist

msdyn_type Options

Value	Label
192350000	Page View
192350001	Search
192350002	KB Article
192350100	Custom Action

msdyn_url

Property	Value
Description	URL for the user navigation record.
DisplayName	URL
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_url

Property	Value
MaxLength	1000
RequiredLevel	None
Type	String

msdyn_visitorjourneyId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Self service
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_visitorjourneyid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid

Property	Value
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the self service
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the self service
DisplayName	Status Reason
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_ocliveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100

Property	Value
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_ocliveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_ocliveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

msdyn_msdyn_ocliveworkitem_msdyn_visitorjourney_ocliveworkitemid

Added by: Active Solution Solution

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_wechatengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

WeChat Engagement Context

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_wechatengagementctxes(*msdyn_wechatengagementctxid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_wechatengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_wechatengagementctxes(*msdyn_wechatengagementctxid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_wechatengagementctxes(*msdyn_wechatengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_wechatengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessReque
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_wechatengagementctxes(*msdyn_wechatengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_wechatengagementctxes(*msdyn_wechatengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_wechatengagementctxes
DisplayCollectionName	WeChat Engagement Contexts
DisplayName	WeChat Engagement Context
EntitySetName	msdyn_wechatengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_wechatengagementctxes
LogicalName	msdyn_wechatengagementctx

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_wechatengagementctxid
PrimaryNameAttribute	msdyn_customername
SchemaName	msdyn_wechatengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_city
- msdyn_country
- msdyn_customerid
- msdyn_customername
- msdyn_gender
- msdyn_liveworkitemid
- msdyn_name
- msdyn_profilepic
- msdyn_province
- msdyn_wechatengagementctxId
- msdyn_wechatengagementid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_city

Property	Value
Description	City
DisplayName	City
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_city
MaxLength	300
RequiredLevel	None
Type	String

msdyn_country

Property	Value
Description	Country/Region
DisplayName	Country/Region
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_country
MaxLength	200
RequiredLevel	None
Type	String

msdyn_customerid

Property	Value
Description	Unique identifier of customer
DisplayName	Customer Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customername

Property	Value
Description	Full name of the customer
DisplayName	Customer Name
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_gender

Property	Value
Description	Customer gender
DisplayName	Gender
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_gender
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique identifier for Conversation associated with WeChat Engagement Context.
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name

Property	Value
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_profilepic

Property	Value
Description	The url of the customer's profile picture
DisplayName	Profile Picture
FormatName	Url
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_profilepic
MaxLength	500
RequiredLevel	None
Type	String

msdyn_province

Property	Value
Description	State/Province
DisplayName	State/Province
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_province
MaxLength	300
RequiredLevel	None
Type	String

msdyn_wechatengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	WeChat Engagement Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_wechatengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_wechatengagementid

Property	Value
Description	WeChat engagement id
DisplayName	WeChat Engagement Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_wechatengagementid
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the WeChat Engagement Context
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the WeChat Engagement Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser

- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_wechatengagementctx_createdby
- lk_msdyn_wechatengagementctx_createdonbehalfby
- lk_msdyn_wechatengagementctx_modifiedby
- lk_msdyn_wechatengagementctx_modifiedonbehalfby
- user_msdyn_wechatengagementctx

lk_msdyn_wechatengagementctx_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_wechatengagementctx_createdby One-To-Many relationship.

lk_msdyn_wechatengagementctx_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_wechatengagementctx_createdonbehalfby One-To-Many relationship.

lk_msdyn_wechatengagementctx_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_wechatengagementctx_modifiedby One-To-Many relationship.

lk_msdyn_wechatengagementctx_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_wechatengagementctx_modifiedonbehalfby One-To-Many relationship.

user_msdyn_wechatengagementctx

Added by: System Solution Solution

See systemuser Entity user_msdyn_wechatengagementctx One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

msdyn_whatsappengagementctx Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

WhatsApp Engagement Context

Added by: Omnichannel – SocialChannels Solution

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/msdyn_whatsappengagementctxes(*msdyn_whatsappengagementctxid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/msdyn_whatsappengagementctxes See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/msdyn_whatsappengagementctxes(*msdyn_whatsappengagementctxid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
IsValidStateTransition	IsValidStateTransition Function	IsValidStateTransitionRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/msdyn_whatsappengagementctxes(*msdyn_whatsappengagementctxid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/msdyn_whatsappengagementctxes See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessR
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/msdyn_whatsappengagementctxes(*msdyn_whatsappengagementctxid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/msdyn_whatsappengagementctxes(*msdyn_whatsappengagementctxid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	msdyn_whatsappengagementctxes
DisplayCollectionName	WhatsApp Engagement Context
DisplayName	WhatsApp Engagement Context
EntitySetName	msdyn_whatsappengagementctxes
IsBPFEntity	False
LogicalCollectionName	msdyn_whatsappengagementctxes
LogicalName	msdyn_whatsappengagementctx

Property	Value
OwnershipType	UserOwned
PrimaryIdAttribute	msdyn_whatsappengagementctxid
PrimaryNameAttribute	msdyn_name
SchemaName	msdyn_whatsappengagementctx

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_customerfirstmessage
- msdyn_customername
- msdyn_customerphonenumber
- msdyn_liveworkitemid
- msdyn_name
- msdyn_whatsappengagementctxId
- msdyn_whatsappengagementid
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- statecode
- statuscode
- TimeZoneRuleVersionNumber
- UTCConversionTimeZoneCode

ImportSequenceNumber

Property	Value
Description	Sequence number of the import that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_customerfirstmessage

Added by: Omnichannel - SocialChannels Patch Solution

Property	Value
Description	WhatsApp Customer's first incoming message
DisplayName	Customer First Message
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerfirstmessage
MaxLength	250
RequiredLevel	None
Type	String

msdyn_customername

Property	Value
Description	Full name of the customer
DisplayName	Customer Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_customerphonenumber

Property	Value
Description	Customer Phone Number
DisplayName	Customer Phone Number
FormatName	Phone
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_customerphonenumber
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkitemid

Property	Value
Description	Unique identifier for Conversation associated with WhatsApp Engagement Context.
DisplayName	Conversation
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkitemid

Property	Value
RequiredLevel	None
Targets	msdyn_ocliveworkitem
Type	Lookup

msdyn_name

Property	Value
Description	The name of the custom entity.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

msdyn_whatsappengagementctxId

Property	Value
Description	Unique identifier for entity instances
DisplayName	WhatsApp Engagement Context
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_whatsappengagementctxid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

msdyn_whatsappengagementid

Property	Value
Description	WhatsApp Engagement Id
DisplayName	WhatsApp Engagement Id
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_whatsappengagementid
MaxLength	100
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Added by: Active Solution Solution

Property	Value
Description	Owner Id
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Added by: Active Solution Solution

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

statecode

Property	Value
Description	Status of the WhatsApp Engagement Context
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

statecode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

statuscode

Property	Value
Description	Reason for the status of the WhatsApp Engagement Context
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

statuscode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkitemidName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- VersionNumber

CreatedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser

Property	Value
Type	Lookup

CreatedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon

Property	Value
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Added by: Active Solution Solution

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Added by: Active Solution Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

msdyn_liveworkitemidName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkitemidname
MaxLength	200
RequiredLevel	None
Type	String

OwnerIdName

Added by: Active Solution Solution

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Added by: Active Solution Solution

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Added by: Active Solution Solution

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

VersionNumber

Added by: Active Solution Solution

Property	Value
Description	Version Number
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_msdyn_whatsappengagementctx_createdby
- lk_msdyn_whatsappengagementctx_createdonbehalfby
- lk_msdyn_whatsappengagementctx_modifiedby
- lk_msdyn_whatsappengagementctx_modifiedonbehalfby
- user_msdyn_whatsappengagementctx

lk_msdyn_whatsappengagementctx_createdby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_whatsappengagementctx_createdby One-To-Many relationship.

lk_msdyn_whatsappengagementctx_createdonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_whatsappengagementctx_createdonbehalfby One-To-Many relationship.

lk_msdyn_whatsappengagementctx_modifiedby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_whatsappengagementctx_modifiedby One-To-Many relationship.

lk_msdyn_whatsappengagementctx_modifiedonbehalfby

Added by: System Solution Solution

See systemuser Entity lk_msdyn_whatsappengagementctx_modifiedonbehalfby One-To-Many relationship.

user_msdyn_whatsappengagementctx

Added by: System Solution Solution

See systemuser Entity user_msdyn_whatsappengagementctx One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

Queue Entity Reference (Dynamics 365 Customer Service)

Article • 03/17/2023

> **Note**
>
> Unsure about table vs. entity? See **Developers: Understand terminology in Microsoft Dataverse**. A list of records that require action, such as accounts, activities, and cases.

Messages

Message	Web API Operation	SDK Assembly
AddPrincipalToQueue	AddPrincipalToQueue Action	AddPrincipalToQueueRequest
Assign	PATCH [*org URI*]/api/data/v9.0/queues(*queueid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/queues See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/queues(*queueid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/queues(*queueid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/queues See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RetrieveUserQueues	RetrieveUserQueues Function	RetrieveUserQueuesRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/queues(*queueid*) Update `statecode` and `statuscode` properties.	SetStateRequest

Message	Web API Operation	SDK Assembly
Update	PATCH [*org URI*]/api/data/v9.0/queues(*queueid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	Queues
DisplayCollectionName	Queues
DisplayName	Queue
EntitySetName	queues
IsBPFEntity	False
LogicalCollectionName	queues
LogicalName	queue
OwnershipType	UserOwned
PrimaryIdAttribute	queueid
PrimaryNameAttribute	name
SchemaName	Queue

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- BusinessUnitId
- Description
- EMailAddress
- EmailRouterAccessApproval
- EntityImage
- IgnoreUnsolicitedEmail
- ImportSequenceNumber
- IncomingEmailDeliveryMethod
- IncomingEmailFilteringMethod
- msdyn_assignmentinputcontractid
- msdyn_assignmentstrategy
- msdyn_isdefaultqueue
- msdyn_isomnichannelqueue

- msdyn_maxqueuesize
- msdyn_operatinghourid
- msdyn_priority
- msdyn_queuetype
- msdyn_uniquename
- Name
- OutgoingEmailDeliveryMethod
- OverriddenCreatedOn
- OwnerId
- OwnerIdType
- PrimaryUserId
- QueueId
- QueueViewType
- StateCode
- StatusCode
- TransactionCurrencyId

BusinessUnitId

Property	Value
Description	Unique identifier of the business unit with which the queue is associated.
DisplayName	Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	businessunitid
RequiredLevel	None
Targets	businessunit
Type	Lookup

Description

Property	Value
Description	Description of the queue.
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	description
MaxLength	2000
RequiredLevel	None
Type	Memo

EMailAddress

Property	Value
Description	Email address that is associated with the queue.
DisplayName	Incoming Email
FormatName	Email
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	emailaddress
MaxLength	100
RequiredLevel	None
Type	String

EmailRouterAccessApproval

Property	Value
Description	Shows the status of the primary email address.
DisplayName	Primary Email Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	emailrouteraccessapproval
RequiredLevel	SystemRequired
Type	Picklist

EmailRouterAccessApproval Choices/Options

Value	Label
0	Empty
1	Approved
2	Pending Approval
3	Rejected

EntityImage

Property	Value
Description	The default image for the entity.
DisplayName	Entity Image
IsPrimaryImage	True
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimage
MaxHeight	144
MaxWidth	144
RequiredLevel	None
Type	Image

IgnoreUnsolicitedEmail

Property	Value
Description	Information that specifies whether a queue is to ignore unsolicited email (deprecated).
DisplayName	Convert To Email Activities
IsValidForForm	True
IsValidForRead	True
LogicalName	ignoreunsolicitedemail
RequiredLevel	None
Type	Boolean

IgnoreUnsolicitedEmail Choices/Options

Value	Label
1	Only specific Emails
0	All incoming Emails

DefaultValue: False

ImportSequenceNumber

Property	Value
Description	Unique identifier of the data import or data migration that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IncomingEmailDeliveryMethod

Property	Value
Description	Incoming email delivery method for the queue.
DisplayName	Incoming Email Delivery Method
IsValidForForm	True
IsValidForRead	True
LogicalName	incomingemaildeliverymethod
RequiredLevel	SystemRequired
Type	Picklist

IncomingEmailDeliveryMethod Choices/Options

Value	Label
0	None
2	Server-Side Synchronization or Email Router
3	Forward Mailbox

IncomingEmailFilteringMethod

Property	Value
Description	Convert Incoming Email To Activities
DisplayName	Convert Incoming Email To Activities
IsValidForForm	True
IsValidForRead	True
LogicalName	incomingemailfilteringmethod
RequiredLevel	SystemRequired
Type	Picklist

IncomingEmailFilteringMethod Choices/Options

Value	Label
0	All email messages
1	Email messages in response to Dynamics 365 email
2	Email messages from Dynamics 365 Leads, Contacts and Accounts
3	Email messages from Dynamics 365 records that are email enabled
4	No email messages

msdyn_assignmentinputcontractid

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Link assignment input contract with queue.
DisplayName	Assignment Input Contract Id
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_assignmentinputcontractid
RequiredLevel	None
Targets	msdyn_decisioncontract
Type	Lookup

msdyn_assignmentstrategy

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	Assignment Strategy
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_assignmentstrategy
RequiredLevel	None
Type	Picklist

msdyn_assignmentstrategy Choices/Options

Value	Label
192350000	Omnichannel Assignment
192350001	Round Robin
192350002	Custom Assignment Configuration

msdyn_isdefaultqueue

Added by: Omnichannel – Base Solution

Property	Value
Description	Shows whether the queue is set as default or not.
DisplayName	Is Default Queue
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_isdefaultqueue
RequiredLevel	None
Type	Boolean

msdyn_isdefaultqueue Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_isomnichannelqueue

Added by: Omnichannel – Base Solution

Property	Value
Description	Shows whether the queue is used as Omnichannel queue for work distribution.
DisplayName	Is Omnichannel queue
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isomnichannelqueue
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_isomnichannelqueue Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_maxqueuesize

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Maximum queue size
DisplayName	Maximum queue size
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_maxqueuesize
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_operatinghourid

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Unique identifier for Operating hour associated with Queue
DisplayName	Operating Hours
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_operatinghourid
RequiredLevel	None
Targets	msdyn_operatinghour
Type	Lookup

msdyn_priority

Added by: Omnichannel – Base Solution

Property	Value
Description	Priority of the queue to indicate conversation assignment order to the agent.
DisplayName	Priority

Property	Value
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_priority
MaxValue	2147483647
MinValue	1
RequiredLevel	ApplicationRequired
Type	Integer

msdyn_queuetype

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Defines the type of channels handled by this queue
DisplayName	Queue type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_queuetype
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_queuetype Choices/Options

Value	Label
192350000	Messaging
192350001	Entity
192350002	Voice

msdyn_uniquename

Added by: Omnichannel - Base Patch Solution

Property	Value

Property	Value
Description	Unique Name for the entity.
DisplayName	Unique Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_uniquename
MaxLength	128
RequiredLevel	None
Type	String

Name

Property	Value
Description	Name of the queue.
DisplayName	Name
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	name
MaxLength	200
RequiredLevel	ApplicationRequired
Type	String

OutgoingEmailDeliveryMethod

Property	Value
Description	Outgoing email delivery method for the queue.
DisplayName	Outgoing Email Delivery Method

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	outgoingemaildeliverymethod
RequiredLevel	SystemRequired
Type	Picklist

OutgoingEmailDeliveryMethod Choices/Options

Value	Label
0	None
2	Server-Side Synchronization or Email Router

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Property	Value
Description	Unique identifier of the user or team who owns the queue.
DisplayName	Owner
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

PrimaryUserId

Property	Value
Description	Unique identifier of the owner of the queue.
DisplayName	Owner (deprecated)
IsValidForForm	False
IsValidForRead	True
LogicalName	primaryuserid
RequiredLevel	None
Targets	systemuser
Type	Lookup

QueueId

Property	Value

Property	Value
Description	Unique identifier of the queue.
DisplayName	Queue
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	queueid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

QueueViewType

Property	Value
Description	Select whether the queue is public or private. A public queue can be viewed by all. A private queue can be viewed only by the members added to the queue.
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	queueviewtype
RequiredLevel	SystemRequired
Type	Picklist

QueueViewType Choices/Options

Value	Label
0	Public
1	Private

StateCode

Property	Value
Description	Status of the queue.
DisplayName	Status

Property	Value
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Choices/Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

StatusCode

Property	Value
Description	Reason for the status of the queue.
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	SystemRequired
Type	Status

StatusCode Choices/Options

Value	Label	State
1	Active	0
2	Inactive	1

TransactionCurrencyId

Property	Value

Property	Value
Description	Unique identifier of the currency associated with the queue.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid
RequiredLevel	None
Targets	transactioncurrency
Type	Lookup

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- AllowEmailCredentials
- BusinessUnitIdName
- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- DefaultMailbox
- DefaultMailboxName
- EmailPassword
- EmailUsername
- EntityImage_Timestamp
- EntityImage_URL
- EntityImageId
- ExchangeRate
- IsEmailAddressApprovedByO365Admin
- IsFaxQueue
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName

- msdyn_assignmentinputcontractidName
- msdyn_operatinghouridName
- NumberOfItems
- NumberOfMembers
- OrganizationId
- OrganizationIdName
- OwnerIdName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- PrimaryUserIdName
- PrimaryUserIdYomiName
- QueueTypeCode
- TransactionCurrencyIdName
- VersionNumber

AllowEmailCredentials

Property	Value
Description	This attribute is no longer used. The data is now in the Mailbox.AllowEmailConnectorToUseCredentials attribute.
DisplayName	Allow to Use Credentials for Email Processing (Obsolete)
IsValidForForm	True
IsValidForRead	True
LogicalName	allowemailcredentials
RequiredLevel	SystemRequired
Type	Boolean

AllowEmailCredentials Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

BusinessUnitIdName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	businessunitidname
MaxLength	100
RequiredLevel	None
Type	String

CreatedBy

Property	Value
Description	Unique identifier of the user who created the queue record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the queue was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None

Property	Value
Type	DateTime

CreatedOnBehalfBy

Property	Value
Description	Unique identifier of the delegate user who created the queue.
DisplayName	Created By (Delegate)
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

DefaultMailbox

Property	Value
Description	Select the mailbox associated with this queue.
DisplayName	Mailbox
IsValidForForm	True
IsValidForRead	True
LogicalName	defaultmailbox
RequiredLevel	None
Targets	mailbox
Type	Lookup

DefaultMailboxName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	defaultmailboxname
MaxLength	100
RequiredLevel	None
Type	String

EmailPassword

Property	Value
Description	This attribute is no longer used. The data is now in the Mailbox.Password attribute.
DisplayName	Password (Obsolete)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	emailpassword
MaxLength	200
RequiredLevel	None
Type	String

EmailUsername

Property	Value
Description	This attribute is no longer used. The data is now in the Mailbox.UserName attribute.
DisplayName	User Name (Obsolete)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	emailusername
MaxLength	200
RequiredLevel	None

Property	Value
Type	String

EntityImage_Timestamp

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimage_timestamp
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

EntityImage_URL

Property	Value
Description	
DisplayName	
FormatName	Url
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimage_url
MaxLength	200
RequiredLevel	None
Type	String

EntityImageId

Property	Value

Property	Value
Description	For internal use only.
DisplayName	Entity Image Id
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimageid
RequiredLevel	None
Type	Uniqueidentifier

ExchangeRate

Property	Value
Description	Exchange rate for the currency associated with the queue with respect to the base currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.0000000001
Precision	10
RequiredLevel	None
Type	Decimal

IsEmailAddressApprovedByO365Admin

Property	Value
Description	Shows the status of approval of the email address by O365 Admin.
DisplayName	Email Address O365 Admin Approval Status
IsValidForForm	False
IsValidForRead	True
LogicalName	isemailaddressapprovedbyo365admin
RequiredLevel	SystemRequired

Property	Value
Type	Boolean

IsEmailAddressApprovedByO365Admin Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsFaxQueue

Property	Value
Description	Indication of whether a queue is the fax delivery queue.
DisplayName	Fax Queue
IsValidForForm	False
IsValidForRead	True
LogicalName	isfaxqueue
RequiredLevel	None
Type	Boolean

IsFaxQueue Choices/Options

Value	Label
1	Fax Queue
0	Non-fax Queue

DefaultValue: False

ModifiedBy

Property	Value
Description	Unique identifier of the user who last modified the queue.
DisplayName	Modified By
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the queue was last modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Property	Value
Description	Unique identifier of the delegate user who last modified the queue.
DisplayName	Modified By (Delegate)
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

msdyn_assignmentinputcontractidName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_assignmentinputcontractidname
MaxLength	200
RequiredLevel	None
Type	String

msdyn_operatinghouridName

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_operatinghouridname
MaxLength	100
RequiredLevel	None
Type	String

NumberOfItems

Property	Value
Description	Number of Queue items associated with the queue.
DisplayName	Queue Items
Format	None
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	numberofitems
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

NumberOfMembers

Property	Value
Description	Number of Members associated with the queue.
DisplayName	No. of Members
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	numberofmembers
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

OrganizationId

Property	Value
Description	Unique identifier of the organization associated with the queue.
DisplayName	Organization
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	SystemRequired
Targets	organization
Type	Lookup

OrganizationIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdYomiName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Property	Value
Description	Unique identifier of the business unit that owns the queue.
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Property	Value
Description	Unique identifier of the team who owns the queue.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team

Property	Value
Type	Lookup

OwningUser

Property	Value
Description	Unique identifier of the user who owns the queue.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

PrimaryUserIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	primaryuseridname
MaxLength	100
RequiredLevel	None
Type	String

PrimaryUserIdYomiName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	primaryuseridyominame
MaxLength	100
RequiredLevel	None
Type	String

QueueTypeCode

Property	Value
Description	Type of queue that is automatically assigned when a user or queue is created. The type can be public, private, or work in process.
DisplayName	Queue Type
IsValidForForm	False
IsValidForRead	True
LogicalName	queuetypecode
RequiredLevel	None
Type	Picklist

QueueTypeCode Choices/Options

Value	Label
1	Default Value

TransactionCurrencyIdName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Property	Value
Description	Version number of the queue.
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

About the Entity Reference
Web API Reference

QueueItem Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

A specific item in a queue, such as a case record or an activity record.

Messages

Message	Web API Operation	SDK Assembly
AddToQueue	AddToQueue Action	AddToQueueRequest
Create	POST [*org URI*]/api/data/v9.0/queueitems See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/queueitems(*queueitemid*) See Delete	DeleteRequest or Delete
PickFromQueue	PickFromQueue Action	PickFromQueueRequest
ReleaseToQueue	ReleaseToQueue Action	ReleaseToQueueRequest
RemoveFromQueue	RemoveFromQueue Action	RemoveFromQueueRequest
Retrieve	GET [*org URI*]/api/data/v9.0/queueitems(*queueitemid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/queueitems See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RouteTo	RouteTo Action	RouteToRequest
SetState	PATCH [*org URI*]/api/data/v9.0/queueitems(*queueitemid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/queueitems(*queueitemid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	QueueItems
DisplayCollectionName	Queue Items
DisplayName	Queue Item
EntitySetName	queueitems
IsBPFEntity	False
LogicalCollectionName	queueitems
LogicalName	queueitem
OwnershipType	None
PrimaryIdAttribute	queueitemid
PrimaryNameAttribute	title
SchemaName	QueueItem

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- ImportSequenceNumber
- msdyn_liveworkstreamid
- ObjectId
- ObjectIdTypeCode
- OverriddenCreatedOn
- Priority
- QueueId
- QueueItemId
- Sender
- State
- StateCode
- Status
- StatusCode
- TimeZoneRuleVersionNumber
- ToRecipients
- TransactionCurrencyId
- UTCConversionTimeZoneCode
- WorkerId
- WorkerIdType

ImportSequenceNumber

Property	Value
Description	Unique identifier of the data import or data migration that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_liveworkstreamid

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	Liveworkstream this queue item belongs to
DisplayName	Live workstream
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_liveworkstreamid
RequiredLevel	None
Targets	msdyn_liveworkstream
Type	Lookup

ObjectId

Property	Value
Description	Choose the activity, case, or article assigned to the queue.
DisplayName	Object
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	objectid
RequiredLevel	ApplicationRequired
Targets	activitypointer,adx_alertsubscription,adx_inviteredemption,adx_portalcomment,appointment,bulkoperation,campaignactivity,campaignresponse,em
Type	Lookup

ObjectIdTypeCode

Property	Value
Description	
DisplayName	Regarding Object Type
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	objectidtypecode
RequiredLevel	None
Type	EntityName

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

Priority

Property	Value
Description	Priority of the queue item.
DisplayName	Priority
Format	None
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	priority
MaxValue	1000000000
MinValue	0
RequiredLevel	None
Type	Integer

QueueId

Property	Value
Description	Choose the queue that the item is assigned to.
DisplayName	Queue
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	queueid
RequiredLevel	ApplicationRequired
Targets	queue
Type	Lookup

QueueItemId

Property	Value
Description	Unique identifier of the queue item.
DisplayName	Queue Item
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	queueitemid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

Sender

Property	Value
Description	Sender who created the queue item.
DisplayName	From
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	sender
MaxLength	250

Property	Value
RequiredLevel	None
Type	String

State

Property	Value
Description	Status of the queue item.
DisplayName	Status (deprecated)
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	state
MaxValue	1000000000
MinValue	0
RequiredLevel	None
Type	Integer

StateCode

Property	Value
Description	Shows whether the queue record is active or inactive. Inactive queue records are read-only and can't be edited unless they are reactivated.
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

Status

Property	Value
Description	Reason for the status of the queue item.
DisplayName	Status Reason (deprecated)
Format	None
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	status
MaxValue	1000000000
MinValue	0
RequiredLevel	None
Type	Integer

StatusCode

Property	Value
Description	Select the item's status.
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	SystemRequired
Type	Status

StatusCode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

ToRecipients

Property	Value
Description	Recipients listed on the To line of the message for email queue items.
DisplayName	To
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	torecipients
MaxLength	500
RequiredLevel	None
Type	String

TransactionCurrencyId

Property	Value
Description	Choose the local currency for the record to make sure budgets are reported in the correct currency.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid
RequiredLevel	None
Targets	transactioncurrency
Type	Lookup

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

WorkerId

Property	Value
Description	Shows who is working on the queue item.
DisplayName	Worked By
IsValidForForm	True
IsValidForRead	True
LogicalName	workerid
RequiredLevel	None
Targets	systemuser,team

Property	Value
Type	Lookup

WorkerIdType

Property	Value
Description	
DisplayName	Worker Type
IsValidForForm	False
IsValidForRead	True
LogicalName	workeridtype
RequiredLevel	ApplicationRequired
Type	EntityName

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- EnteredOn
- ExchangeRate
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_liveworkstreamidName
- ObjectIdName
- ObjectTypeCode
- OrganizationId
- OrganizationIdName
- OwnerId
- OwnerIdType
- OwningBusinessUnit
- OwningUser
- QueueIdName
- Title
- TransactionCurrencyIdName
- VersionNumber
- WorkerIdModifiedOn
- WorkerIdName
- WorkerIdYomiName

CreatedBy

Property	Value
Description	Shows who created the record.

Property	Value
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Shows the date and time when the record was created. The date and time are displayed in the time zone selected in Microsoft Dynamics 365 options.
DisplayName	Created On

Property	Value
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Property	Value
Description	Shows who created the record on behalf of another user.
DisplayName	Created By (Delegate)
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

EnteredOn

Property	Value
DateTimeBehavior	UserLocal
Description	Shows the date the record was assigned to the queue.
DisplayName	Entered Queue
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	enteredon
RequiredLevel	None
Type	DateTime

ExchangeRate

Property	Value
Description	Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.0000000001
Precision	10
RequiredLevel	None
Type	Decimal

ModifiedBy

Property	Value
Description	Shows who last updated the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Shows the date and time when the record was last updated. The date and time are displayed in the time zone selected in Microsoft Dynamics 365 options.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Property	Value

Property	Value
Description	Unique identifier of the delegate user who last modified the queueitem.
DisplayName	Modified By (Delegate)
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

msdyn_liveworkstreamidName

Added by: Dynamics 365 UR OmnichanelBase Dependency Solution

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_liveworkstreamidname
MaxLength	100
RequiredLevel	None
Type	String

ObjectIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	objectidname
MaxLength	800
RequiredLevel	None
Type	String

ObjectTypeCode

Property	Value
Description	Select the type of the queue item, such as activity, case, or appointment.
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	objecttypecode
RequiredLevel	None
Type	Picklist

ObjectTypeCode Options

Value	Label
4	Lead
112	Case
4200	Activity
4201	Appointment
4202	Email
4204	Fax

Value	Label
4207	Letter
4210	Phone Call
4212	Task
4214	Service Activity
4216	Social Activity
4251	Recurring Appointment
4401	Campaign Response
4402	Campaign Activity
4406	Quick Campaign
9953	Knowledge Article
10053	Knowledge Article Template
10109	IoT Alert
10220	Customer Voice alert
10229	Customer Voice survey invite
10231	Customer Voice survey response
10240	Booking Alert
10263	Fulfillment Preference
10264	Time Group Detail
10304	Ongoing conversation (Deprecated)
10310	Conversation
10319	Session
10402	Outbound message
10440	Alert Subscription
10443	Invite Redemption
10492	Portal Comment

OrganizationId

Property	Value
Description	Unique identifier of the organization with which the queue item is associated.
DisplayName	Organization
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	SystemRequired
Targets	organization
Type	Lookup

OrganizationIdName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerId

Property	Value
Description	Unique identifier of the user or team who owns the queue item.
DisplayName	Owner
IsValidForForm	False
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	ApplicationRequired
Targets	systemuser,team
Type	Owner

OwnerIdType

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

OwningBusinessUnit

Property	Value
Description	Unique identifier of the business unit that owns the queue item.
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	ApplicationRequired
Targets	businessunit

Property	Value
Type	Lookup

OwningUser

Property	Value
Description	Unique identifier of the user who owns the queue item.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	ApplicationRequired
Targets	systemuser
Type	Lookup

QueueIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	queueidname
MaxLength	400
RequiredLevel	SystemRequired
Type	String

Title

Property	Value
Description	Shows the title or name that describes the queue record. This value is copied from the record that was assigned to the queue.
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	title
MaxLength	300
RequiredLevel	None
Type	String

TransactionCurrencyIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Property	Value
Description	Version number of the queue item.
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

WorkerIdModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Shows the date and time when the queue item was last assigned to a user.
DisplayName	Worked On
Format	DateOnly
IsValidForForm	True
IsValidForRead	True
LogicalName	workeridmodifiedon
RequiredLevel	None
Type	DateTime

WorkerIdName

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	workeridname
MaxLength	160
RequiredLevel	None
Type	String

WorkerIdYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	workeridyominame
MaxLength	160
RequiredLevel	None
Type	String

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

RoutingRule Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Define Routing Rule to route cases to right people at the right time

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/routingrules(*routingruleid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/routingrules See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/routingrules(*routingruleid*) See Delete	DeleteRequest or Delete
GrantAccess	GrantAccess Action	GrantAccessRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/routingrules(*routingruleid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/routingrules See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/routingrules(*routingruleid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/routingrules(*routingruleid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value

Property	Value
CollectionSchemaName	RoutingRules
DisplayCollectionName	Routing Rule Sets
DisplayName	Routing Rule Set
EntitySetName	routingrules
IsBPFEntity	False
LogicalCollectionName	routingrules
LogicalName	routingrule
OwnershipType	UserOwned
PrimaryIdAttribute	routingruleid
PrimaryNameAttribute	name
SchemaName	RoutingRule

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- Description
- msdyn_entitylogicalname
- Name
- OwnerId
- OwnerIdName
- OwnerIdType
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- RoutingRuleId
- StateCode
- StatusCode
- TimeZoneRuleVersionNumber
- TransactionCurrencyId
- UTCConversionTimeZoneCode
- WorkflowId
- WorkflowIdName

Description

Property	Value
Description	Provide a description about the objective of the routing rule.

Property	Value
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	description
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_entitylogicalname

Added by: Entity records routing Solution

Property	Value
Description	Logical name of the entity (deprecated).
DisplayName	Entity (Deprecated)
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	msdyn_entitylogicalname
MaxLength	200
RequiredLevel	None
Type	String

Name

Property	Value
Description	Provide a name for the routing rule.
DisplayName	Name
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	name
MaxLength	100
RequiredLevel	ApplicationRequired
Type	String

OwnerId

Property	Value
Description	For internal use only.
DisplayName	Owner
IsValidForForm	True
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdName

Property	Value
Description	For internal use only.
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdType

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

OwnerIdYomiName

Property	Value
Description	For internal use only
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Property	Value
Description	For internal use only
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Property	Value
Description	Unique identifier for the team that owns the record.
DisplayName	Owning Team
IsValidForForm	False
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Property	Value
Description	Unique identifier for the user that owns the record.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

RoutingRuleId

Property	Value
Description	Unique identifier for entity instances
DisplayName	Routing Rule
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	routingruleid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

StateCode

Property	Value
Description	Status of the Routing Rule
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Options

Value	Label	DefaultStatus	InvariantName
0	Draft	1	Draft
1	Active	2	Active

StatusCode

Property	Value
Description	Reason for the status of the Routing Rule
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

StatusCode Options

Value	Label	State
1	Draft	0
2	Active	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	For internal use only.
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

TransactionCurrencyId

Property	Value
Description	Unique identifier of the currency associated with the Routing Rule.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid
RequiredLevel	None
Targets	transactioncurrency
Type	Lookup

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647

Property	Value
MinValue	-1
RequiredLevel	None
Type	Integer

WorkflowId

Property	Value
Description	Unique identifier for Workflow.
DisplayName	Workflow
IsValidForForm	True
IsValidForRead	True
LogicalName	workflowid
RequiredLevel	ApplicationRequired
Targets	workflow
Type	Lookup

WorkflowIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	workflowidname
MaxLength	100
RequiredLevel	None
Type	String

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ComponentState
- CreatedBy

- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ExchangeRate
- IsManaged
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- OrganizationId
- OrganizationIdName
- OverwriteTime
- RoutingRuleIdUnique
- SolutionId
- SupportingSolutionId
- TransactionCurrencyIdName
- VersionNumber

ComponentState

Property	Value
Description	For internal use only.
DisplayName	Component State
IsValidForForm	False
IsValidForRead	True
LogicalName	componentstate
RequiredLevel	SystemRequired
Type	Picklist

ComponentState Options

Value	Label
0	Published
1	Unpublished
2	Deleted
3	Deleted Unpublished

CreatedBy

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Property	Value
Description	

Property	Value
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ExchangeRate

Property	Value
Description	Exchange rate for the currency associated with the queue with respect to the base currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000

Property	Value
MinValue	0.0000000001
Precision	10
RequiredLevel	None
Type	Decimal

IsManaged

Property	Value
Description	For internal use only.
DisplayName	Is Managed
IsValidForForm	False
IsValidForRead	True
LogicalName	ismanaged
RequiredLevel	SystemRequired
Type	Boolean

IsManaged Options

Value	Label
1	Managed
0	Unmanaged

DefaultValue: False

ModifiedBy

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OrganizationId

Property	Value
Description	the organization associated with the Routing Rule
DisplayName	Organization
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	SystemRequired
Targets	organization
Type	Lookup

OrganizationIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname

Property	Value
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OverwriteTime

Property	Value
DateTimeBehavior	UserLocal
Description	For internal use only.
DisplayName	Record Overwrite Time
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
LogicalName	overwritetime
RequiredLevel	SystemRequired
Type	DateTime

RoutingRuleIdUnique

Property	Value
Description	For internal use only.
DisplayName	Unique Id
IsValidForForm	False
IsValidForRead	True
LogicalName	routingruleidunique
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SolutionId

Property	Value
Description	Unique identifier of the associated solution.
DisplayName	Solution
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	solutionid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

SupportingSolutionId

Property	Value
Description	For internal use only.
DisplayName	Solution
IsValidForForm	False
IsValidForRead	False
LogicalName	supportingsolutionid
RequiredLevel	None
Type	Uniqueidentifier

TransactionCurrencyIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Property	Value
Description	Version number of the Routing Rule.

Property	Value
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

SocialProfile Entity Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This entity is used to store social profile information of its associated account and contacts on different social channels.

Messages

Message	Web API Operation	SDK Assembly
Assign	PATCH [*org URI*]/api/data/v9.0/socialprofiles(*socialprofileid*) Update `ownerid` property.	AssignRequest
Create	POST [*org URI*]/api/data/v9.0/socialprofiles See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/socialprofiles(*socialprofileid*) See Delete	DeleteRequest or Delete
GenerateSocialProfile	GenerateSocialProfile Action	GenerateSocialProfileRequest
GrantAccess	GrantAccess Action	GrantAccessRequest
ModifyAccess	ModifyAccess Action	ModifyAccessRequest
Retrieve	GET [*org URI*]/api/data/v9.0/socialprofiles(*socialprofileid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/socialprofiles See Query Data	RetrieveMultipleRequest or RetrieveMultiple
RetrievePrincipalAccess	RetrievePrincipalAccess Function	RetrievePrincipalAccessRequest
RetrieveSharedPrincipalsAndAccess	RetrieveSharedPrincipalsAndAccess Function	RetrieveSharedPrincipalsAndAccessRequest
RevokeAccess	RevokeAccess Action	RevokeAccessRequest
SetState	PATCH [*org URI*]/api/data/v9.0/socialprofiles(*socialprofileid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/socialprofiles(*socialprofileid*) See Update	UpdateRequest or Update

Entity Properties

Property	Value
CollectionSchemaName	SocialProfiles
DisplayCollectionName	Social Profiles
DisplayName	Social Profile
EntitySetName	socialprofiles
IsBPFEntity	False
LogicalCollectionName	socialprofiles
LogicalName	socialprofile
OwnershipType	UserOwned
PrimaryIdAttribute	socialprofileid
PrimaryNameAttribute	profilename
SchemaName	SocialProfile

Writable attributes

These attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- Blocked
- Community
- CustomerId
- CustomerIdName
- CustomerIdType
- CustomerIdYomiName
- ImportSequenceNumber
- InfluenceScore
- msdyn_ocfollowercount
- msdyn_ocfollowingcount
- msdyn_ocfriendcount
- msdyn_octwitterhandleid
- msdyn_phonenumber
- msdyn_profileimagelink
- OverriddenCreatedOn
- OwnerId
- OwnerIdName
- OwnerIdType
- ProfileFullName
- ProfileLink
- ProfileName
- SocialProfileId
- StateCode
- StatusCode
- TimeZoneRuleVersionNumber

- TransactionCurrencyId
- UniqueProfileID
- UTCConversionTimeZoneCode

Blocked

Property	Value
Description	Identifies if the social profile has been blocked.
DisplayName	Blocked
IsValidForForm	True
IsValidForRead	True
LogicalName	blocked
RequiredLevel	None
Type	Boolean

Blocked Options

Value	Label
1	Yes
0	No

DefaultValue: False

Community

Property	Value
Description	Identifies where the social profile originated from, such as Twitter, or Facebook.
DisplayName	Social Channel
IsValidForForm	True
IsValidForRead	True
IsValidForUpdate	False
LogicalName	community
RequiredLevel	None
Type	Picklist

Community Options

Value	Label

Value	Label
0	Other
1	Facebook
2	Twitter
3	Line
4	Wechat
5	Cortana
6	Direct Line
7	Microsoft Teams
8	Direct Line Speech
9	Email
10	GroupMe
11	Kik
12	Telegram
13	Skype
14	Slack
15	WhatsApp

CustomerId

Property	Value
Description	Shows the customer that this social profile belongs to.
DisplayName	Customer
IsValidForForm	True
IsValidForRead	True
LogicalName	customerid
RequiredLevel	None
Targets	account,contact
Type	Customer

CustomerIdName

Property	Value
Description	Select the parent account or parent contact for the contact to provide a quick link to additional details, such as financial information, activities, and opportunities.

Property	Value
DisplayName	Parent Customer Type
FormatName	Text
IsLocalizable	False
IsValidForCreate	False
IsValidForForm	False
IsValidForRead	True
LogicalName	customeridname
MaxLength	160
RequiredLevel	None
Type	String

CustomerIdType

Property	Value
Description	Select the parent account or parent contact for the contact
DisplayName	Parent Customer Type
IsValidForForm	False
IsValidForRead	True
LogicalName	customeridtype
RequiredLevel	None
Type	EntityName

CustomerIdYomiName

Property	Value
Description	Select the parent account or parent contact for the contact
DisplayName	Parent Customer Type
FormatName	Text
IsLocalizable	False
IsValidForCreate	False
IsValidForForm	False
IsValidForRead	True
LogicalName	customeridyominame
MaxLength	450

Property	Value
RequiredLevel	None
Type	String

ImportSequenceNumber

Property	Value
Description	Unique identifier of the data import or data migration that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

InfluenceScore

Property	Value
Description	Shows the score that determines the online social influence of the social profile.
DisplayName	Influence Score
IsValidForForm	True
IsValidForRead	True
LogicalName	influencescore
MaxValue	1000000000
MinValue	0
Precision	2
RequiredLevel	None
Type	Double

msdyn_ocfollowercount

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Customer's Followers on the Social channel.
DisplayName	Follower Count
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocfollowercount
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_ocfollowingcount

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Customer's followings on the Social channel
DisplayName	Followings Count
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_ocfollowingcount
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_ocfriendcount

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Customer's Friend count on the Social Channel
DisplayName	Friend Count
Format	None
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	msdyn_ocfriendcount
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

msdyn_octwitterhandleid

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	Lookup for Twitter Handle entity.
DisplayName	Twitter Handle Id
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_octwitterhandleid
RequiredLevel	None
Targets	msdyn_octwitterhandle
Type	Lookup

msdyn_phonenumber

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	The phone number of the social profile.
DisplayName	Phone number
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_phonenumber
MaxLength	100
RequiredLevel	None
Type	String

msdyn_profileimagelink

Added by: Omnichannel - Base Patch Solution

Property	Value
Description	Link to the Customer's Social Channel Profile image.
DisplayName	Profile Image Link
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_profileimagelink
MaxLength	4000
RequiredLevel	None
Type	String

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

OwnerId

Property	Value
Description	Shows the user or team that is assigned to manage the record. This field is updated every time the record is assigned to a different user.
DisplayName	Owner
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	ownerid
RequiredLevel	SystemRequired
Targets	systemuser,team
Type	Owner

OwnerIdName

Property	Value
Description	Name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForCreate	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwnerIdType

Property	Value
Description	Owner Id Type
DisplayName	
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridtype
RequiredLevel	SystemRequired
Type	EntityName

ProfileFullName

Property	Value

Property	Value
Description	Shows the display name of the customer on this social profile.
DisplayName	Full Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	profilefullname
MaxLength	160
RequiredLevel	None
Type	String

ProfileLink

Property	Value
Description	Shows the customer that this social profile belongs to.
DisplayName	Profile Link
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	profilelink
MaxLength	100
RequiredLevel	None
Type	String

ProfileName

Property	Value
Description	Shows the name of the social profile on the corresponding social channel.
DisplayName	Profile Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	profilename
MaxLength	100
RequiredLevel	None
Type	String

SocialProfileId

Property	Value
Description	Unique Identifier of the social profile name.
DisplayName	Social Profile ID
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	socialprofileid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

StateCode

Property	Value
Description	Status of the Social Profile
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	statecode
RequiredLevel	SystemRequired
Type	State

StateCode Options

Value	Label	DefaultStatus	InvariantName
0	Active	1	Active
1	Inactive	2	Inactive

StatusCode

Property	Value
Description	Reason for the status of the Social Profile
DisplayName	Status Reason
IsValidForForm	True
IsValidForRead	True
LogicalName	statuscode
RequiredLevel	None
Type	Status

StatusCode Options

Value	Label	State
1	Active	0
2	Inactive	1

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

TransactionCurrencyId

Property	Value
Description	Choose the local currency for the record to make sure budgets are reported in the correct currency.
DisplayName	Currency

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid
RequiredLevel	None
Targets	transactioncurrency
Type	Lookup

UniqueProfileID

Property	Value
Description	Unique ID of the Profile ID
DisplayName	Unique Profile ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	uniqueprofileid
MaxLength	100
RequiredLevel	None
Type	String

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Read-only attributes

These attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- CreatedBy
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- ExchangeRate
- ModifiedBy
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_octwitterhandleidName
- OwnerIdYomiName
- OwningBusinessUnit
- OwningTeam
- OwningUser
- TransactionCurrencyIdName
- VersionNumber

CreatedBy

Property	Value
Description	Unique identifier of the user who created the record.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was created.
DisplayName	Created On
Format	DateAndTime

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None
Type	DateTime

CreatedOnBehalfBy

Property	Value
Description	Unique identifier of the delegate user who created the record.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Property	Value

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

ExchangeRate

Property	Value
Description	Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency.
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.0000000001
Precision	10
RequiredLevel	None
Type	Decimal

ModifiedBy

Property	Value
Description	Unique identifier of the user who modified the record.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby

Property	Value
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the record was modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None
Type	DateTime

ModifiedOnBehalfBy

Property	Value
Description	Unique identifier of the delegate user who modified the record.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

msdyn_octwitterhandleidName

Added by: Omnichannel – SocialChannels Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_octwitterhandleidname
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

OwnerIdYomiName

Property	Value
Description	Yomi name of the owner
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	owneridyominame
MaxLength	100
RequiredLevel	SystemRequired
Type	String

OwningBusinessUnit

Property	Value
Description	Unique identifier for the business unit that owns the record
DisplayName	Owning Business Unit
IsValidForForm	False
IsValidForRead	True
LogicalName	owningbusinessunit
RequiredLevel	None
Targets	businessunit
Type	Lookup

OwningTeam

Property	Value
Description	Unique identifier of the team who owns the contact.
DisplayName	Owning Team
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	owningteam
RequiredLevel	None
Targets	team
Type	Lookup

OwningUser

Property	Value
Description	Unique identifier of the user who owns the contact.
DisplayName	Owning User
IsValidForForm	False
IsValidForRead	True
LogicalName	owninguser
RequiredLevel	None
Targets	systemuser
Type	Lookup

TransactionCurrencyIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Property	Value

Property	Value
Description	Version number of the social profile.
DisplayName	Version Number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

One-To-Many Relationships

Listed by **SchemaName**.

socialprofile_cases

Added by: Service Solution

Same as incident entity socialprofile_cases Many-To-One relationship.

Property	Value
ReferencingEntity	incident
ReferencingAttribute	socialprofileid
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	socialprofile_cases
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Service Label: Order: 10
CascadeConfiguration	Assign: NoCascade Delete: RemoveLink Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related entity. Listed by **SchemaName**.

- lk_SocialProfile_createdonbehalfby
- socialProfile_owning_user
- lk_SocialProfile_modifiedonbehalfby

lk_SocialProfile_createdonbehalfby

See systemuser Entity lk_SocialProfile_createdonbehalfby One-To-Many relationship.

socialProfile_owning_user

See systemuser Entity socialProfile_owning_user One-To-Many relationship.

lk_SocialProfile_modifiedonbehalfby

See systemuser Entity lk_SocialProfile_modifiedonbehalfby One-To-Many relationship.

See also

Introduction to Omnichannel for Customer Service
Developer guide for Omnichannel for Customer Service

SystemUser table/entity reference

Article • 03/17/2023

> **Note**
>
> Unsure about table vs. entity? See **Developers: Understand terminology in Microsoft Dataverse**. Person with access to the Microsoft CRM system and who owns objects in the Microsoft CRM database.

Messages

Message	Web API Operation	SDK Assembly
Create	POST [*org URI*]/api/data/v9.0/systemusers See Create	CreateRequest or Create
Delete	DELETE [*org URI*]/api/data/v9.0/systemusers(*systemuserid*) See Delete	DeleteRequest or Delete
msdyn_GDPROptoutUser	Microsoft.Dynamics.CRM.msdyn_GDPROptoutUser?text=msdyn_GDPROptoutUser Action	Type generated by CrmSvcUtil.exe or use OrganizationRequest setting the required parameters for the message.
ReassignObjectsSystemUser	ReassignObjectsSystemUser Action	ReassignObjectsSystemUserRequest
RemoveParent	RemoveParent Action	RemoveParentRequest
Retrieve	GET [*org URI*]/api/data/v9.0/systemusers(*systemuserid*) See Retrieve	RetrieveRequest or Retrieve
RetrieveAllChildUsersSystemUser	RetrieveAllChildUsersSystemUser Function	RetrieveAllChildUsersSystemUserRequest
RetrieveMultiple	GET [*org URI*]/api/data/v9.0/systemusers See Query Data	RetrieveMultipleRequest or RetrieveMultiple
SetBusinessEquipment	Microsoft.Dynamics.CRM.SetBusinessEquipment?text=SetBusinessEquipment Action	SetBusinessEquipmentRequest
SetBusinessSystemUser	SetBusinessSystemUser Action	SetBusinessSystemUserRequest
SetParentBusinessUnit	Associate and disassociate entities	SetParentBusinessUnitRequest
SetParentSystemUser	SetParentSystemUser Action	SetParentSystemUserRequest
SetParentTeam	SetParentTeam Action	SetParentTeamRequest
SetState	PATCH [*org URI*]/api/data/v9.0/systemusers(*systemuserid*) Update `statecode` and `statuscode` properties.	SetStateRequest
Update	PATCH [*org URI*]/api/data/v9.0/systemusers(*systemuserid*) See Update	UpdateRequest or Update

Properties

Property	Value
CollectionSchemaName	SystemUsers
DisplayCollectionName	Users
DisplayName	User
EntitySetName	systemusers
IsBPFEntity	False
LogicalCollectionName	systemusers
LogicalName	systemuser
OwnershipType	BusinessOwned
PrimaryIdAttribute	systemuserid
PrimaryNameAttribute	fullname
SchemaName	SystemUser

Writable columns/attributes

These columns/attributes return true for either **IsValidForCreate** or **IsValidForUpdate** (usually both). Listed by **SchemaName**.

- AccessMode
- Address1_AddressId
- Address1_AddressTypeCode
- Address1_City
- Address1_Country
- Address1_County
- Address1_Fax
- Address1_Latitude
- Address1_Line1
- Address1_Line2
- Address1_Line3
- Address1_Longitude
- Address1_Name
- Address1_PostalCode
- Address1_PostOfficeBox
- Address1_ShippingMethodCode
- Address1_StateOrProvince
- Address1_Telephone1
- Address1_Telephone2
- Address1_Telephone3
- Address1_UPSZone
- Address1_UTCOffset
- Address2_AddressId
- Address2_AddressTypeCode
- Address2_City

- Address2_Country
- Address2_County
- Address2_Fax
- Address2_Latitude
- Address2_Line1
- Address2_Line2
- Address2_Line3
- Address2_Longitude
- Address2_Name
- Address2_PostalCode
- Address2_PostOfficeBox
- Address2_ShippingMethodCode
- Address2_StateOrProvince
- Address2_Telephone1
- Address2_Telephone2
- Address2_Telephone3
- Address2_UPSZone
- Address2_UTCOffset
- ApplicationId
- AzureState
- BusinessUnitId
- CalendarId
- CALType
- DisplayInServiceViews
- DomainName
- EmailRouterAccessApproval
- EmployeeId
- EntityImage
- FirstName
- GovernmentId
- HomePhone
- ImportSequenceNumber
- IncomingEmailDeliveryMethod
- InternalEMailAddress
- InviteStatusCode
- IsDisabled
- IsIntegrationUser
- IsLicensed
- IsSyncWithDirectory
- JobTitle
- LastName
- MiddleName
- MobileAlertEMail
- MobileOfflineProfileId
- MobileOfflineProfileIdName
- MobilePhone
- msdyn_AgentType
- msdyn_BotApplicationId
- msdyn_BotDescription

- msdyn_BotEndpoint
- msdyn_bothandle
- msdyn_BotProvider
- msdyn_BotSecretKeys
- msdyn_Capacity
- msdyn_cognitiveservicesregion
- msdyn_cognitiveservicessubscriptionkey
- msdyn_DefaultPresenceIdUser
- msdyn_gdproptout
- msdyn_gridwrappercontrolfield
- msdyn_isexpertenabledforswarm
- msdyn_OwningEnvironmentId
- msdyn_phonenumberid
- msdyn_UserType
- NickName
- OutgoingEmailDeliveryMethod
- OverriddenCreatedOn
- ParentSystemUserId
- PassportHi
- PassportLo
- PersonalEMailAddress
- PhotoUrl
- PositionId
- PreferredAddressCode
- PreferredEmailCode
- PreferredPhoneCode
- ProcessId
- QueueId
- Salutation
- SetupUser
- SharePointEmailAddress
- SiteId
- Skills
- StageId
- SystemUserId
- TerritoryId
- TimeZoneRuleVersionNumber
- Title
- TransactionCurrencyId
- TraversedPath
- UserLicenseType
- UTCConversionTimeZoneCode
- WindowsLiveID
- YammerEmailAddress
- YammerUserId
- YomiFirstName
- YomiLastName
- YomiMiddleName

AccessMode

Property	Value
Description	Type of user.
DisplayName	Access Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	accessmode
RequiredLevel	SystemRequired
Type	Picklist

AccessMode Choices/Options

Value	Label
0	Read-Write
1	Administrative
2	Read
3	Support User
4	Non-interactive
5	Delegated Admin

Address1_AddressId

Property	Value
Description	Unique identifier for address 1.
DisplayName	Address 1: ID
IsValidForForm	False
IsValidForRead	True
LogicalName	address1_addressid
RequiredLevel	None
Type	Uniqueidentifier

Address1_AddressTypeCode

Property	Value
Description	Type of address for address 1, such as billing, shipping, or primary address.

Property	Value
DisplayName	Address 1: Address Type
IsValidForForm	False
IsValidForRead	True
LogicalName	address1_addresstypecode
RequiredLevel	None
Type	Picklist

Address1_AddressTypeCode Choices/Options

Value	Label
1	Default Value

Address1_City

Property	Value
Description	City name for address 1.
DisplayName	City
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_city
MaxLength	128
RequiredLevel	None
Type	String

Address1_Country

Property	Value
Description	Country/region name in address 1.
DisplayName	Country/Region
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	address1_country
MaxLength	128
RequiredLevel	None
Type	String

Address1_County

Property	Value
Description	County name for address 1.
DisplayName	Address 1: County
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_county
MaxLength	128
RequiredLevel	None
Type	String

Address1_Fax

Property	Value
Description	Fax number for address 1.
DisplayName	Address 1: Fax
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_fax
MaxLength	64
RequiredLevel	None
Type	String

Address1_Latitude

Property	Value
Description	Latitude for address 1.
DisplayName	Address 1: Latitude
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_latitude
MaxValue	90
MinValue	-90
Precision	5
RequiredLevel	None
Type	Double

Address1_Line1

Property	Value
Description	First line for entering address 1 information.
DisplayName	Street 1
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_line1
MaxLength	1024
RequiredLevel	None
Type	String

Address1_Line2

Property	Value
Description	Second line for entering address 1 information.
DisplayName	Street 2
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	address1_line2
MaxLength	1024
RequiredLevel	None
Type	String

Address1_Line3

Property	Value
Description	Third line for entering address 1 information.
DisplayName	Street 3
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_line3
MaxLength	1024
RequiredLevel	None
Type	String

Address1_Longitude

Property	Value
Description	Longitude for address 1.
DisplayName	Address 1: Longitude
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_longitude
MaxValue	180
MinValue	-180
Precision	5
RequiredLevel	None
Type	Double

Address1_Name

Property	Value
Description	Name to enter for address 1.
DisplayName	Address 1: Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_name
MaxLength	100
RequiredLevel	None
Type	String

Address1_PostalCode

Property	Value
Description	ZIP Code or postal code for address 1.
DisplayName	ZIP/Postal Code
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_postalcode
MaxLength	40
RequiredLevel	None
Type	String

Address1_PostOfficeBox

Property	Value
Description	Post office box number for address 1.
DisplayName	Address 1: Post Office Box
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	address1_postofficebox
MaxLength	40
RequiredLevel	None
Type	String

Address1_ShippingMethodCode

Property	Value
Description	Method of shipment for address 1.
DisplayName	Address 1: Shipping Method
IsValidForForm	False
IsValidForRead	True
LogicalName	address1_shippingmethodcode
RequiredLevel	None
Type	Picklist

Address1_ShippingMethodCode Choices/Options

Value	Label
1	Default Value

Address1_StateOrProvince

Property	Value
Description	State or province for address 1.
DisplayName	State/Province
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_stateorprovince
MaxLength	128
RequiredLevel	None
Type	String

Address1_Telephone1

Property	Value
Description	First telephone number associated with address 1.
DisplayName	Main Phone
FormatName	Phone
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_telephone1
MaxLength	64
RequiredLevel	None
Type	String

Address1_Telephone2

Property	Value
Description	Second telephone number associated with address 1.
DisplayName	Other Phone
FormatName	Phone
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_telephone2
MaxLength	50
RequiredLevel	None
Type	String

Address1_Telephone3

Property	Value
Description	Third telephone number associated with address 1.
DisplayName	Pager
FormatName	Phone
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_telephone3
MaxLength	50
RequiredLevel	None
Type	String

Address1_UPSZone

Property	Value
Description	United Parcel Service (UPS) zone for address 1.
DisplayName	Address 1: UPS Zone
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	address1_upszone
MaxLength	4
RequiredLevel	None
Type	String

Address1_UTCOffset

Property	Value
Description	UTC offset for address 1. This is the difference between local time and standard Coordinated Universal Time.
DisplayName	Address 1: UTC Offset
Format	TimeZone
IsValidForForm	False
IsValidForRead	True
LogicalName	address1_utcoffset
MaxValue	1500
MinValue	-1500
RequiredLevel	None

Property	Value
Type	Integer

Address2_AddressId

Property	Value
Description	Unique identifier for address 2.
DisplayName	Address 2: ID
IsValidForForm	False
IsValidForRead	True
LogicalName	address2_addressid
RequiredLevel	None
Type	Uniqueidentifier

Address2_AddressTypeCode

Property	Value
Description	Type of address for address 2, such as billing, shipping, or primary address.
DisplayName	Address 2: Address Type
IsValidForForm	False
IsValidForRead	True
LogicalName	address2_addresstypecode
RequiredLevel	None
Type	Picklist

Address2_AddressTypeCode Choices/Options

Value	Label
1	Default Value

Address2_City

Property	Value
Description	City name for address 2.
DisplayName	Other City
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_city
MaxLength	128
RequiredLevel	None
Type	String

Address2_Country

Property	Value
Description	Country/region name in address 2.
DisplayName	Other Country/Region
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_country
MaxLength	128
RequiredLevel	None
Type	String

Address2_County

Property	Value
Description	County name for address 2.
DisplayName	Address 2: County
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_county
MaxLength	128
RequiredLevel	None

Property	Value
Type	String

Address2_Fax

Property	Value
Description	Fax number for address 2.
DisplayName	Address 2: Fax
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_fax
MaxLength	50
RequiredLevel	None
Type	String

Address2_Latitude

Property	Value
Description	Latitude for address 2.
DisplayName	Address 2: Latitude
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_latitude
MaxValue	90
MinValue	-90
Precision	5
RequiredLevel	None
Type	Double

Address2_Line1

Property	Value
Description	First line for entering address 2 information.
DisplayName	Other Street 1

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_line1
MaxLength	1024
RequiredLevel	None
Type	String

Address2_Line2

Property	Value
Description	Second line for entering address 2 information.
DisplayName	Other Street 2
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_line2
MaxLength	1024
RequiredLevel	None
Type	String

Address2_Line3

Property	Value
Description	Third line for entering address 2 information.
DisplayName	Other Street 3
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_line3
MaxLength	1024

Property	Value
RequiredLevel	None
Type	String

Address2_Longitude

Property	Value
Description	Longitude for address 2.
DisplayName	Address 2: Longitude
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_longitude
MaxValue	180
MinValue	-180
Precision	5
RequiredLevel	None
Type	Double

Address2_Name

Property	Value
Description	Name to enter for address 2.
DisplayName	Address 2: Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_name
MaxLength	100
RequiredLevel	None
Type	String

Address2_PostalCode

Property	Value
Description	ZIP Code or postal code for address 2.

Property	Value
DisplayName	Other ZIP/Postal Code
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_postalcode
MaxLength	40
RequiredLevel	None
Type	String

Address2_PostOfficeBox

Property	Value
Description	Post office box number for address 2.
DisplayName	Address 2: Post Office Box
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_postofficebox
MaxLength	40
RequiredLevel	None
Type	String

Address2_ShippingMethodCode

Property	Value
Description	Method of shipment for address 2.
DisplayName	Address 2: Shipping Method
IsValidForForm	False
IsValidForRead	True
LogicalName	address2_shippingmethodcode
RequiredLevel	None
Type	Picklist

Address2_ShippingMethodCode Choices/Options

Value	Label
1	Default Value

Address2_StateOrProvince

Property	Value
Description	State or province for address 2.
DisplayName	Other State/Province
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_stateorprovince
MaxLength	128
RequiredLevel	None
Type	String

Address2_Telephone1

Property	Value
Description	First telephone number associated with address 2.
DisplayName	Address 2: Telephone 1
FormatName	Phone
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_telephone1
MaxLength	50
RequiredLevel	None
Type	String

Address2_Telephone2

Property	Value

Property	Value
Description	Second telephone number associated with address 2.
DisplayName	Address 2: Telephone 2
FormatName	Phone
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_telephone2
MaxLength	50
RequiredLevel	None
Type	String

Address2_Telephone3

Property	Value
Description	Third telephone number associated with address 2.
DisplayName	Address 2: Telephone 3
FormatName	Phone
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_telephone3
MaxLength	50
RequiredLevel	None
Type	String

Address2_UPSZone

Property	Value
Description	United Parcel Service (UPS) zone for address 2.
DisplayName	Address 2: UPS Zone
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	address2_upszone
MaxLength	4
RequiredLevel	None
Type	String

Address2_UTCOffset

Property	Value
Description	UTC offset for address 2. This is the difference between local time and standard Coordinated Universal Time.
DisplayName	Address 2: UTC Offset
Format	TimeZone
IsValidForForm	False
IsValidForRead	True
LogicalName	address2_utcoffset
MaxValue	1500
MinValue	-1500
RequiredLevel	None
Type	Integer

ApplicationId

Property	Value
Description	The identifier for the application. This is used to access data in another application.
DisplayName	Application ID
IsValidForForm	True
IsValidForRead	True
LogicalName	applicationid
RequiredLevel	None
Type	Uniqueidentifier

AzureState

Added by: AuthorizationCore Solution

Property	Value

Property	Value
Description	Azure state of user
DisplayName	Azure State
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	azurestate
RequiredLevel	SystemRequired
Type	Picklist

AzureState Choices/Options

Value	Label
0	Exists
1	Soft deleted
2	Not found or hard deleted

BusinessUnitId

Property	Value
Description	Unique identifier of the business unit with which the user is associated.
DisplayName	Business Unit
IsValidForForm	True
IsValidForRead	True
LogicalName	businessunitid
RequiredLevel	SystemRequired
Targets	businessunit
Type	Lookup

CalendarId

Property	Value
Description	Fiscal calendar associated with the user.
DisplayName	Calendar
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	calendarid
RequiredLevel	None
Targets	calendar
Type	Lookup

CALType

Property	Value
Description	License type of user. This is used only in the on-premises version of the product. Online licenses are managed through Microsoft 365 Office Portal
DisplayName	License Type
IsValidForForm	True
IsValidForRead	True
LogicalName	caltype
RequiredLevel	SystemRequired
Type	Picklist

CALType Choices/Options

Value	Label
0	Professional
1	Administrative
2	Basic
3	Device Professional
4	Device Basic
5	Essential
6	Device Essential
7	Enterprise
8	Device Enterprise
9	Sales
10	Service
11	Field Service
12	Project Service

DisplayInServiceViews

Property	Value
Description	Whether to display the user in service views.
DisplayName	Display in Service Views
IsValidForForm	False
IsValidForRead	True
LogicalName	displayinserviceviews
RequiredLevel	None
Type	Boolean

DisplayInServiceViews Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

DomainName

Property	Value
Description	Active Directory domain of which the user is a member.
DisplayName	User Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	domainname
MaxLength	1024
RequiredLevel	SystemRequired
Type	String

EmailRouterAccessApproval

Property	Value
Description	Shows the status of the primary email address.
DisplayName	Primary Email Status
IsValidForCreate	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	emailrouteraccessapproval
RequiredLevel	SystemRequired
Type	Picklist

EmailRouterAccessApproval Choices/Options

Value	Label
0	Empty
1	Approved
2	Pending Approval
3	Rejected

EmployeeId

Property	Value
Description	Employee identifier for the user.
DisplayName	Employee
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	employeeid
MaxLength	100
RequiredLevel	None
Type	String

EntityImage

Property	Value
Description	Shows the default image for the record.
DisplayName	Entity Image
IsPrimaryImage	True
IsValidForForm	False

Property	Value
IsValidForRead	True
LogicalName	entityimage
MaxHeight	144
MaxWidth	144
RequiredLevel	None
Type	Image

FirstName

Property	Value
Description	First name of the user.
DisplayName	First Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	firstname
MaxLength	256
RequiredLevel	ApplicationRequired
Type	String

GovernmentId

Property	Value
Description	Government identifier for the user.
DisplayName	Government
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	governmentid
MaxLength	100
RequiredLevel	None
Type	String

HomePhone

Property	Value
Description	Home phone number for the user.
DisplayName	Home Phone
FormatName	Phone
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	homephone
MaxLength	50
RequiredLevel	None
Type	String

ImportSequenceNumber

Property	Value
Description	Unique identifier of the data import or data migration that created this record.
DisplayName	Import Sequence Number
Format	None
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	importsequencenumber
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	None
Type	Integer

IncomingEmailDeliveryMethod

Property	Value
Description	Incoming email delivery method for the user.
DisplayName	Incoming Email Delivery Method
IsValidForForm	True

Property	Value
IsValidForRead	True
LogicalName	incomingemaildeliverymethod
RequiredLevel	SystemRequired
Type	Picklist

IncomingEmailDeliveryMethod Choices/Options

Value	Label
0	None
1	Microsoft Dynamics 365 for Outlook
2	Server-Side Synchronization or Email Router
3	Forward Mailbox

InternalEMailAddress

Property	Value
Description	Internal email address for the user.
DisplayName	Primary Email
FormatName	Email
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	internalemailaddress
MaxLength	100
RequiredLevel	SystemRequired
Type	String

InviteStatusCode

Property	Value
Description	User invitation status.
DisplayName	Invitation Status
IsValidForForm	True
IsValidForRead	True
LogicalName	invitestatuscode

Property	Value
RequiredLevel	ApplicationRequired
Type	Picklist

InviteStatusCode Choices/Options

Value	Label
0	Invitation Not Sent
1	Invited
2	Invitation Near Expired
3	Invitation Expired
4	Invitation Accepted
5	Invitation Rejected
6	Invitation Revoked

IsDisabled

Property	Value
Description	Information about whether the user is enabled.
DisplayName	Status
IsValidForCreate	False
IsValidForForm	True
IsValidForRead	True
LogicalName	isdisabled
RequiredLevel	None
Type	Boolean

IsDisabled Choices/Options

Value	Label
1	Disabled
0	Enabled

DefaultValue: False

IsIntegrationUser

Property	Value
Description	Check if user is an integration user.
DisplayName	Integration user mode
IsValidForForm	True
IsValidForRead	True
LogicalName	isintegrationuser
RequiredLevel	SystemRequired
Type	Boolean

IsIntegrationUser Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsLicensed

Property	Value
Description	Information about whether the user is licensed.
DisplayName	User Licensed
IsValidForForm	True
IsValidForRead	True
LogicalName	islicensed
RequiredLevel	SystemRequired
Type	Boolean

IsLicensed Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

IsSyncWithDirectory

Property	Value
Description	Information about whether the user is synced with the directory.
DisplayName	User Synced
IsValidForForm	False
IsValidForRead	True
LogicalName	issyncwithdirectory
RequiredLevel	SystemRequired
Type	Boolean

IsSyncWithDirectory Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

JobTitle

Property	Value
Description	Job title of the user.
DisplayName	Job Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	jobtitle
MaxLength	100
RequiredLevel	None
Type	String

LastName

Property	Value
Description	Last name of the user.
DisplayName	Last Name

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	lastname
MaxLength	256
RequiredLevel	ApplicationRequired
Type	String

MiddleName

Property	Value
Description	Middle name of the user.
DisplayName	Middle Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	middlename
MaxLength	50
RequiredLevel	None
Type	String

MobileAlertEMail

Property	Value
Description	Mobile alert email address for the user.
DisplayName	Mobile Alert Email
FormatName	Email
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	mobilealertemail
MaxLength	100

Property	Value
RequiredLevel	None
Type	String

MobileOfflineProfileId

Property	Value
Description	Items contained with a particular SystemUser.
DisplayName	Mobile Offline Profile
IsValidForForm	False
IsValidForRead	True
LogicalName	mobileofflineprofileid
RequiredLevel	None
Targets	mobileofflineprofile
Type	Lookup

MobileOfflineProfileIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	mobileofflineprofileidname
MaxLength	100
RequiredLevel	None
Type	String

MobilePhone

Property	Value
Description	Mobile phone number for the user.
DisplayName	Mobile Phone
FormatName	Phone

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	mobilephone
MaxLength	64
RequiredLevel	None
Type	String

msdyn_AgentType

Added by: Omnichannel – Bot Enabler Solution

Property	Value
Description	Type of user - Application user or Bot application user
DisplayName	User type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_agentType
RequiredLevel	None
Type	Picklist

msdyn_AgentType Choices/Options

Value	Label
192350000	Application user
192350001	Bot application user

msdyn_BotApplicationId

Added by: Omnichannel – Bot Enabler Solution

Property	Value
Description	Application ID of the bot.
DisplayName	Bot application ID
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_botapplicationid
MaxLength	100
RequiredLevel	None
Type	String

msdyn_BotDescription

Added by: Omnichannel – Base Solution

Property	Value
Description	BOT User Description
DisplayName	Description
Format	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_botdescription
MaxLength	2000
RequiredLevel	None
Type	Memo

msdyn_BotEndpoint

Added by: Omnichannel – Base Solution

Property	Value
Description	Bot User Endpoint
DisplayName	Endpoint
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_botendpoint

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

msdyn_bothandle

Added by: Omnichannel - Bot Enabler Patch Solution

Property	Value
Description	Bot handle
DisplayName	Bot handle
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_bothandle
MaxLength	100
RequiredLevel	None
Type	String

msdyn_BotProvider

Added by: Omnichannel - Bot Enabler Patch Solution

Property	Value
Description	Indicates the type of bot
DisplayName	Bot Provider
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_botprovider
RequiredLevel	ApplicationRequired
Type	Picklist

msdyn_BotProvider Choices/Options

Value	Label

Value	Label
192350000	Virtual Agent
192350001	Other
192350002	None

msdyn_BotSecretKeys

Added by: Omnichannel – Base Solution

Property	Value
Description	Bot User Secret Keys
DisplayName	Secret Keys
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_botsecretkeys
MaxLength	100
RequiredLevel	None
Type	String

msdyn_Capacity

Added by: Omnichannel – Base Solution

Property	Value
Description	Capacity associated with the User.
DisplayName	Capacity
Format	None
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_capacity
MaxValue	2147483647
MinValue	0
RequiredLevel	None
Type	Integer

msdyn_cognitiveservicesregion

Added by: Omnichannel - Telephony Solution

Property	Value
Description	Cognitive Services Region
DisplayName	Cognitive Services Region
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_cognitiveservicesregion
MaxLength	100
RequiredLevel	None
Type	String

msdyn_cognitiveservicessubscriptionkey

Added by: Omnichannel - Telephony Solution

Property	Value
Description	Cognitive Services Subscription Key
DisplayName	Cognitive Services Subscription Key
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_cognitiveservicessubscriptionkey
MaxLength	100
RequiredLevel	None
Type	String

msdyn_DefaultPresenceIdUser

Added by: Omnichannel – Base Solution

Property	Value
Description	Unique identifier for Presence associated with User.

Property	Value
DisplayName	Default Presence
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_defaultpresenceiduser
RequiredLevel	None
Targets	msdyn_presence
Type	Lookup

msdyn_gdproptout

Added by: SI Common Solution

Property	Value
Description	Describes whether user is opted out or not
DisplayName	GDPR Optout
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_gdproptout
RequiredLevel	None
Type	Boolean

msdyn_gdproptout Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_gridwrappercontrolfield

Added by: Omnichannel - Skill Based Routing Solution

Property	Value
Description	Field to bind grid wrapper control
DisplayName	Grid Wrapper Control field
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_gridwrappercontrolfield
MaxLength	4000
RequiredLevel	None
Type	String

msdyn_isexpertenabledforswarm

Added by: swarming Solution

Property	Value
Description	Check if swarm is enabled for the experts.
DisplayName	Expert Enabled Swarm
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_isexpertenabledforswarm
RequiredLevel	ApplicationRequired
Type	Boolean

msdyn_isexpertenabledforswarm Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

msdyn_OwningEnvironmentId

Added by: Omnichannel - Bot Enabler Patch Solution

Property	Value
Description	Environment Id of the CDS environment that owns the bot user.
DisplayName	Owning Environment Id
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_owningenvironmentid
MaxLength	500
RequiredLevel	None
Type	String

msdyn_phonenumberid

Added by: Omnichannel - CommunicationBase Solution

Property	Value
Description	
DisplayName	Phone Number
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_phonenumberid
RequiredLevel	None
Targets	msdyn_ocphonenumber
Type	Lookup

msdyn_UserType

Added by: Omnichannel – Base Solution

Property	Value
Description	Type of user - CRM or BOT user
DisplayName	Type
IsValidForForm	True
IsValidForRead	True
LogicalName	msdyn_usertype
RequiredLevel	None
Type	Picklist

msdyn_UserType Choices/Options

Value	Label
192350000	CRM User
192350001	BOT User

NickName

Property	Value
Description	Nickname of the user.
DisplayName	Nickname
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	nickname
MaxLength	50
RequiredLevel	None
Type	String

OutgoingEmailDeliveryMethod

Property	Value
Description	Outgoing email delivery method for the user.
DisplayName	Outgoing Email Delivery Method
IsValidForForm	True
IsValidForRead	True
LogicalName	outgoingemaildeliverymethod
RequiredLevel	SystemRequired
Type	Picklist

OutgoingEmailDeliveryMethod Choices/Options

Value	Label
0	None
1	Microsoft Dynamics 365 for Outlook
2	Server-Side Synchronization or Email Router

OverriddenCreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time that the record was migrated.
DisplayName	Record Created On
Format	DateOnly
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	overriddencreatedon
RequiredLevel	None
Type	DateTime

ParentSystemUserId

Property	Value
Description	Unique identifier of the manager of the user.
DisplayName	Manager
IsValidForForm	True
IsValidForRead	True
LogicalName	parentsystemuserid
RequiredLevel	None
Targets	systemuser
Type	Lookup

PassportHi

Property	Value
Description	For internal use only.
DisplayName	Passport Hi
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	passporthi

Property	Value
MaxValue	1000000000
MinValue	0
RequiredLevel	None
Type	Integer

PassportLo

Property	Value
Description	For internal use only.
DisplayName	Passport Lo
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	passportlo
MaxValue	1000000000
MinValue	0
RequiredLevel	None
Type	Integer

PersonalEMailAddress

Property	Value
Description	Personal email address of the user.
DisplayName	Email 2
FormatName	Email
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	personalemailaddress
MaxLength	100
RequiredLevel	None
Type	String

PhotoUrl

Property	Value
Description	URL for the Website on which a photo of the user is located.
DisplayName	Photo URL
FormatName	Url
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	photourl
MaxLength	200
RequiredLevel	None
Type	String

PositionId

Property	Value
Description	User's position in hierarchical security model.
DisplayName	Position
IsValidForForm	True
IsValidForRead	True
LogicalName	positionid
RequiredLevel	None
Targets	position
Type	Lookup

PreferredAddressCode

Property	Value
Description	Preferred address for the user.
DisplayName	Preferred Address
IsValidForForm	True
IsValidForRead	True
LogicalName	preferredaddresscode
RequiredLevel	None
Type	Picklist

PreferredAddressCode Choices/Options

Value	Label
1	Mailing Address
2	Other Address

PreferredEmailCode

Property	Value
Description	Preferred email address for the user.
DisplayName	Preferred Email
IsValidForForm	True
IsValidForRead	True
LogicalName	preferredemailcode
RequiredLevel	None
Type	Picklist

PreferredEmailCode Choices/Options

Value	Label
1	Default Value

PreferredPhoneCode

Property	Value
Description	Preferred phone number for the user.
DisplayName	Preferred Phone
IsValidForForm	True
IsValidForRead	True
LogicalName	preferredphonecode
RequiredLevel	None
Type	Picklist

PreferredPhoneCode Choices/Options

Value	Label
1	Main Phone

Value	Label
2	Other Phone
3	Home Phone
4	Mobile Phone
192350005	Omnichannel Phone

ProcessId

Property	Value
Description	Shows the ID of the process.
DisplayName	Process
IsValidForForm	False
IsValidForRead	True
LogicalName	processid
RequiredLevel	None
Type	Uniqueidentifier

QueueId

Property	Value
Description	Unique identifier of the default queue for the user.
DisplayName	Default Queue
IsValidForForm	False
IsValidForRead	True
LogicalName	queueid
RequiredLevel	None
Targets	queue
Type	Lookup

Salutation

Property	Value
Description	Salutation for correspondence with the user.
DisplayName	Salutation
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	True
IsValidForRead	True
LogicalName	salutation
MaxLength	20
RequiredLevel	None
Type	String

SetupUser

Property	Value
Description	Check if user is a setup user.
DisplayName	Restricted Access Mode
IsValidForForm	True
IsValidForRead	True
LogicalName	setupuser
RequiredLevel	SystemRequired
Type	Boolean

SetupUser Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

SharePointEmailAddress

Property	Value
Description	SharePoint Work Email Address
DisplayName	SharePoint Email Address
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	sharepointemailaddress
MaxLength	1024
RequiredLevel	None
Type	String

SiteId

Added by: Service Solution

Property	Value
Description	Site at which the user is located.
DisplayName	Site
IsValidForForm	True
IsValidForRead	True
LogicalName	siteid
RequiredLevel	None
Targets	site
Type	Lookup

Skills

Property	Value
Description	Skill set of the user.
DisplayName	Skills
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	skills
MaxLength	100
RequiredLevel	None
Type	String

StageId

Property	Value
Description	Shows the ID of the stage.
DisplayName	(Deprecated) Process Stage
IsValidForForm	False
IsValidForRead	True
LogicalName	stageid
RequiredLevel	None
Type	Uniqueidentifier

SystemUserId

Property	Value
Description	Unique identifier for the user.
DisplayName	User
IsValidForForm	False
IsValidForRead	True
IsValidForUpdate	False
LogicalName	systemuserid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

TerritoryId

Added by: Application Common Solution

Property	Value
Description	Unique identifier of the territory to which the user is assigned.
DisplayName	Territory
IsValidForForm	True
IsValidForRead	True
LogicalName	territoryid
RequiredLevel	None
Targets	territory
Type	Lookup

TimeZoneRuleVersionNumber

Property	Value
Description	For internal use only.
DisplayName	Time Zone Rule Version Number
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	timezoneruleversionnumber
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

Title

Property	Value
Description	Title of the user.
DisplayName	Title
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	title
MaxLength	128
RequiredLevel	None
Type	String

TransactionCurrencyId

Property	Value
Description	Unique identifier of the currency associated with the systemuser.
DisplayName	Currency
IsValidForForm	True
IsValidForRead	True
LogicalName	transactioncurrencyid
RequiredLevel	None

Property	Value
Targets	transactioncurrency
Type	Lookup

TraversedPath

Property	Value
Description	For internal use only.
DisplayName	(Deprecated) Traversed Path
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	traversedpath
MaxLength	1250
RequiredLevel	None
Type	String

UserLicenseType

Property	Value
Description	Shows the type of user license.
DisplayName	User License Type
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	userlicensetype
MaxValue	2147483647
MinValue	-2147483648
RequiredLevel	SystemRequired
Type	Integer

UTCConversionTimeZoneCode

Property	Value
Description	Time zone code that was in use when the record was created.

Property	Value
DisplayName	UTC Conversion Time Zone Code
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	utcconversiontimezonecode
MaxValue	2147483647
MinValue	-1
RequiredLevel	None
Type	Integer

WindowsLiveID

Property	Value
Description	Windows Live ID
DisplayName	Windows Live ID
FormatName	Email
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	windowsliveid
MaxLength	1024
RequiredLevel	None
Type	String

YammerEmailAddress

Property	Value
Description	User's Yammer login email address
DisplayName	Yammer Email
FormatName	Email
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	yammeremailaddress

Property	Value
MaxLength	200
RequiredLevel	None
Type	String

YammerUserId

Property	Value
Description	User's Yammer ID
DisplayName	Yammer User ID
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	yammeruserid
MaxLength	128
RequiredLevel	None
Type	String

YomiFirstName

Property	Value
Description	Pronunciation of the first name of the user, written in phonetic hiragana or katakana characters.
DisplayName	Yomi First Name
FormatName	PhoneticGuide
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	yomifirstname
MaxLength	64
RequiredLevel	None
Type	String

YomiLastName

Property	Value

Property	Value
Description	Pronunciation of the last name of the user, written in phonetic hiragana or katakana characters.
DisplayName	Yomi Last Name
FormatName	PhoneticGuide
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	yomilastname
MaxLength	64
RequiredLevel	None
Type	String

YomiMiddleName

Property	Value
Description	Pronunciation of the middle name of the user, written in phonetic hiragana or katakana characters.
DisplayName	Yomi Middle Name
FormatName	PhoneticGuide
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	yomimiddlename
MaxLength	50
RequiredLevel	None
Type	String

Read-only columns/attributes

These columns/attributes return false for both **IsValidForCreate** or **IsValidForUpdate**. Listed by **SchemaName**.

- ActiveDirectoryGuid
- Address1_Composite
- Address2_Composite
- ApplicationIdUri
- AzureActiveDirectoryObjectId
- AzureDeletedOn
- BusinessUnitIdName
- CreatedBy

- CreatedByName
- CreatedByYomiName
- CreatedOn
- CreatedOnBehalfBy
- CreatedOnBehalfByName
- CreatedOnBehalfByYomiName
- DefaultFiltersPopulated
- DefaultMailbox
- DefaultMailboxName
- DefaultOdbFolderName
- DeletedState
- DisabledReason
- EntityImage_Timestamp
- EntityImage_URL
- EntityImageId
- ExchangeRate
- FullName
- IdentityId
- IsActiveDirectoryUser
- IsEmailAddressApprovedByO365Admin
- LatestUpdateTime
- ModifiedBy
- ModifiedByName
- ModifiedByYomiName
- ModifiedOn
- ModifiedOnBehalfBy
- ModifiedOnBehalfByName
- ModifiedOnBehalfByYomiName
- msdyn_DefaultPresenceIdUserName
- msdyn_phonenumberidName
- OrganizationId
- OrganizationIdName
- ParentSystemUserIdName
- ParentSystemUserIdYomiName
- PositionIdName
- QueueIdName
- SiteIdName
- TerritoryIdName
- TransactionCurrencyIdName
- UserPuid
- VersionNumber
- YomiFullName

ActiveDirectoryGuid

Property	Value
Description	Active Directory object GUID for the system user.
DisplayName	Active Directory Guid

Property	Value
IsValidForForm	False
IsValidForRead	False
LogicalName	activedirectoryguid
RequiredLevel	None
Type	Uniqueidentifier

Address1_Composite

Property	Value
Description	Shows the complete primary address.
DisplayName	Address
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address1_composite
MaxLength	1000
RequiredLevel	None
Type	Memo

Address2_Composite

Property	Value
Description	Shows the complete secondary address.
DisplayName	Other Address
Format	TextArea
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	address2_composite
MaxLength	1000
RequiredLevel	None
Type	Memo

ApplicationIdUri

Property	Value
Description	The URI used as a unique logical identifier for the external app. This can be used to validate the application.
DisplayName	Application ID URI
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	applicationiduri
MaxLength	1024
RequiredLevel	None
Type	String

AzureActiveDirectoryObjectId

Property	Value
Description	This is the application directory object Id.
DisplayName	Azure AD Object ID
IsValidForForm	True
IsValidForRead	True
LogicalName	azureactivedirectoryobjectid
RequiredLevel	None
Type	Uniqueidentifier

AzureDeletedOn

Added by: AuthorizationCore Solution

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the user was set as soft deleted in Azure.
DisplayName	Azure Deleted On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True

Property	Value
LogicalName	azuredeletedon
RequiredLevel	None
Type	DateTime

BusinessUnitIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	businessunitidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

CreatedBy

Property	Value
Description	Unique identifier of the user who created the user.
DisplayName	Created By
IsValidForForm	True
IsValidForRead	True
LogicalName	createdby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedByName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdbyyominame
MaxLength	100
RequiredLevel	None
Type	String

CreatedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the user was created.
DisplayName	Created On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	createdon
RequiredLevel	None

Property	Value
Type	DateTime

CreatedOnBehalfBy

Property	Value
Description	Unique identifier of the delegate user who created the systemuser.
DisplayName	Created By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	createdonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

CreatedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

CreatedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	createdonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

DefaultFiltersPopulated

Property	Value
Description	Indicates if default outlook filters have been populated.
DisplayName	Default Filters Populated
IsValidForForm	False
IsValidForRead	True
LogicalName	defaultfilterspopulated
RequiredLevel	SystemRequired
Type	Boolean

DefaultFiltersPopulated Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

DefaultMailbox

Property	Value
Description	Select the mailbox associated with this user.
DisplayName	Mailbox
IsValidForForm	True
IsValidForRead	True
LogicalName	defaultmailbox
RequiredLevel	None

Property	Value
Targets	mailbox
Type	Lookup

DefaultMailboxName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	defaultmailboxname
MaxLength	100
RequiredLevel	None
Type	String

DefaultOdbFolderName

Property	Value
Description	Type a default folder name for the user's OneDrive For Business location.
DisplayName	Default OneDrive for Business Folder Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	defaultodbfoldername
MaxLength	200
RequiredLevel	SystemRequired
Type	String

DeletedState

Added by: AuthorizationCore Solution

Property	Value
Description	User delete state
DisplayName	Deleted State
IsValidForForm	True
IsValidForRead	True
LogicalName	deletedstate
RequiredLevel	SystemRequired
Type	Picklist

DeletedState Choices/Options

Value	Label
0	Not deleted
1	Soft deleted

DisabledReason

Property	Value
Description	Reason for disabling the user.
DisplayName	Disabled Reason
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	disabledreason
MaxLength	500
RequiredLevel	None
Type	String

EntityImage_Timestamp

Property	Value
Description	
DisplayName	
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	entityimage_timestamp
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

EntityImage_URL

Property	Value
Description	
DisplayName	
FormatName	Url
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimage_url
MaxLength	200
RequiredLevel	None
Type	String

EntityImageId

Property	Value
Description	For internal use only.
DisplayName	Entity Image Id
IsValidForForm	False
IsValidForRead	True
LogicalName	entityimageid
RequiredLevel	None
Type	Uniqueidentifier

ExchangeRate

Property	Value
Description	Exchange rate for the currency associated with the systemuser with respect to the base currency.

Property	Value
DisplayName	Exchange Rate
IsValidForForm	True
IsValidForRead	True
LogicalName	exchangerate
MaxValue	100000000000
MinValue	0.000000000001
Precision	12
RequiredLevel	None
Type	Decimal

FullName

Property	Value
Description	Full name of the user.
DisplayName	Full Name
FormatName	Text
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	fullname
MaxLength	200
RequiredLevel	None
Type	String

IdentityId

Property	Value
Description	For internal use only.
DisplayName	Unique user identity id
Format	None
IsValidForForm	False
IsValidForRead	True
LogicalName	identityid
MaxValue	2147483647

Property	Value
MinValue	-2147483648
RequiredLevel	SystemRequired
Type	Integer

IsActiveDirectoryUser

Property	Value
Description	Information about whether the user is an AD user.
DisplayName	Is Active Directory User
IsValidForForm	False
IsValidForRead	False
LogicalName	isactivedirectoryuser
RequiredLevel	SystemRequired
Type	Boolean

IsActiveDirectoryUser Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: True

IsEmailAddressApprovedByO365Admin

Property	Value
Description	Shows the status of approval of the email address by O365 Admin.
DisplayName	Email Address O365 Admin Approval Status
IsValidForForm	False
IsValidForRead	True
LogicalName	isemailaddressapprovedbyo365admin
RequiredLevel	SystemRequired
Type	Boolean

IsEmailAddressApprovedByO365Admin Choices/Options

Value	Label
1	Yes
0	No

DefaultValue: False

LatestUpdateTime

Property	Value
DateTimeBehavior	UserLocal
Description	Time stamp of the latest update for the user
DisplayName	Latest User Update Time
Format	DateAndTime
IsValidForForm	False
IsValidForRead	False
LogicalName	latestupdatetime
RequiredLevel	None
Type	DateTime

ModifiedBy

Property	Value
Description	Unique identifier of the user who last modified the user.
DisplayName	Modified By
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedByName

Property	Value
Description	
DisplayName	

Property	Value
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedbyyominame
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOn

Property	Value
DateTimeBehavior	UserLocal
Description	Date and time when the user was last modified.
DisplayName	Modified On
Format	DateAndTime
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedon
RequiredLevel	None

Property	Value
Type	DateTime

ModifiedOnBehalfBy

Property	Value
Description	Unique identifier of the delegate user who last modified the systemuser.
DisplayName	Modified By (Delegate)
IsValidForForm	True
IsValidForRead	True
LogicalName	modifiedonbehalfby
RequiredLevel	None
Targets	systemuser
Type	Lookup

ModifiedOnBehalfByName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyname
MaxLength	100
RequiredLevel	None
Type	String

ModifiedOnBehalfByYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False

Property	Value
IsValidForForm	False
IsValidForRead	True
LogicalName	modifiedonbehalfbyyominame
MaxLength	100
RequiredLevel	None
Type	String

msdyn_DefaultPresenceIdUserName

Added by: Omnichannel – Base Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_defaultpresenceidusername
MaxLength	100
RequiredLevel	None
Type	String

msdyn_phonenumberidName

Added by: Omnichannel - CommunicationBase Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	msdyn_phonenumberidname

Property	Value
MaxLength	100
RequiredLevel	None
Type	String

OrganizationId

Property	Value
Description	Unique identifier of the organization associated with the user.
DisplayName	Organization
IsValidForForm	True
IsValidForRead	True
LogicalName	organizationid
RequiredLevel	SystemRequired
Type	Uniqueidentifier

OrganizationIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	organizationidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

ParentSystemUserIdName

Property	Value
Description	
DisplayName	
FormatName	Text

Property	Value
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	parentsystemuseridname
MaxLength	100
RequiredLevel	None
Type	String

ParentSystemUserIdYomiName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	parentsystemuseridyominame
MaxLength	100
RequiredLevel	None
Type	String

PositionIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	positionidname
MaxLength	100
RequiredLevel	None

Property	Value
Type	String

QueueIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	queueidname
MaxLength	400
RequiredLevel	None
Type	String

SiteIdName

Added by: Service Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	siteidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

TerritoryIdName

Added by: Application Common Solution

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	territoryidname
MaxLength	100
RequiredLevel	SystemRequired
Type	String

TransactionCurrencyIdName

Property	Value
Description	
DisplayName	
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True
LogicalName	transactioncurrencyidname
MaxLength	100
RequiredLevel	None
Type	String

UserPuid

Property	Value
Description	User PUID User Identifiable Information
DisplayName	User PUID
FormatName	Text
IsLocalizable	False
IsValidForForm	False
IsValidForRead	True

Property	Value
LogicalName	userpuid
MaxLength	100
RequiredLevel	None
Type	String

VersionNumber

Property	Value
Description	Version number of the user.
DisplayName	Version number
IsValidForForm	False
IsValidForRead	True
LogicalName	versionnumber
MaxValue	9223372036854775807
MinValue	-9223372036854775808
RequiredLevel	None
Type	BigInt

YomiFullName

Property	Value
Description	Pronunciation of the full name of the user, written in phonetic hiragana or katakana characters.
DisplayName	Yomi Full Name
FormatName	PhoneticGuide
IsLocalizable	False
IsValidForForm	True
IsValidForRead	True
LogicalName	yomifullname
MaxLength	200
RequiredLevel	None
Type	String

One-To-Many Relationships

Listed by **SchemaName**.

- lk_systemuserbase_modifiedby
- lk_systemuser_createdonbehalfby
- user_parent_user
- lk_systemuser_modifiedonbehalfby
- lk_systemuserbase_createdby

lk_systemuserbase_modifiedby

Same as systemuser table lk_systemuserbase_modifiedby Many-To-One relationship.

Property	Value
ReferencingEntity	systemuser
ReferencingAttribute	modifiedby
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	lk_systemuserbase_modifiedby
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

lk_systemuser_createdonbehalfby

Same as systemuser table lk_systemuser_createdonbehalfby Many-To-One relationship.

Property	Value
ReferencingEntity	systemuser
ReferencingAttribute	createdonbehalfby
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	lk_systemuser_createdonbehalfby
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

user_parent_user

Same as systemuser table user_parent_user Many-To-One relationship.

Property	Value
ReferencingEntity	systemuser
ReferencingAttribute	parentsystemuserid
IsHierarchical	True
IsCustomizable	True
ReferencedEntityNavigationPropertyName	user_parent_user
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

lk_systemuser_modifiedonbehalfby

Same as systemuser table lk_systemuser_modifiedonbehalfby Many-To-One relationship.

Property	Value
ReferencingEntity	systemuser
ReferencingAttribute	modifiedonbehalfby
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	lk_systemuser_modifiedonbehalfby
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:

Property	Value
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

lk_systemuserbase_createdby

Same as systemuser table lk_systemuserbase_createdby Many-To-One relationship.

Property	Value
ReferencingEntity	systemuser
ReferencingAttribute	createdby
IsHierarchical	False
IsCustomizable	True
ReferencedEntityNavigationPropertyName	lk_systemuserbase_createdby
AssociatedMenuConfiguration	Behavior: DoNotDisplay Group: Details Label: Order:
CascadeConfiguration	Assign: NoCascade Delete: NoCascade Merge: NoCascade Reparent: NoCascade Share: NoCascade Unshare: NoCascade

Many-To-One Relationships

Each Many-To-One relationship is defined by a corresponding One-To-Many relationship with the related table. Listed by **SchemaName**.

- user_parent_user
- lk_systemuserbase_modifiedby
- lk_systemuser_modifiedonbehalfby
- lk_systemuserbase_createdby
- lk_systemuser_createdonbehalfby

user_parent_user

See systemuser Table user_parent_user One-To-Many relationship.

lk_systemuserbase_modifiedby

See systemuser Table lk_systemuserbase_modifiedby One-To-Many relationship.

lk_systemuser_modifiedonbehalfby

See systemuser Table lk_systemuser_modifiedonbehalfby One-To-Many relationship.

lk_systemuserbase_createdby

See systemuser Table lk_systemuserbase_createdby One-To-Many relationship.

lk_systemuser_createdonbehalfby

See systemuser Table lk_systemuser_createdonbehalfby One-To-Many relationship.

See also

Web API Reference
systemuser EntityType

Live chat SDK Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The following JavaScript methods can be used to do various operations with the live chat widget of Omnichannel for Customer Service.

Methods

Method	Description
setContextProvider	Sets the context provider. The context provider function, when invoked, returns the context to be used for initializing a chat session.
getContextProvider	Retrieves the currently set custom context provider, if any.
removeContextProvider	Removes the currently set custom context provider, if any.
setAuthTokenProvider	Sets the authentication token provider.
getAuthTokenProvider	Gets the currently set authentication token provider, if any.
removeAuthTokenProvider	Removes the currently set authentication token provider, if any.
startChat	Opens an existing chat, if any. Otherwise, it initiates a new chat.
startProactiveChat	Enables organizations to engage users by automatically inviting them to a chat conversation based on the configured rules.
closeChat	Ends the conversation between the agent and customer. Any browser cache related to the conversation is also deleted.
getAgentAvailability	Retrieves the agent availability for a queue based on the routing rules. The omnichannel developer can use this API to determine whether the start conversation option should be visible to the customer and also for displaying information such as wait time and position in queues.

Events

Event	Description
lcw:ready	This event is raised when the live chat SDK is ready to use.
lcw:error	This event is raised in case an error occurs during the lifetime of a chat.For information about error codes and error messages, see the Error code reference for Omnichannel for Customer Service.
lcw:startChat	This event is triggered when a chat is started.
lcw:closeChat	This event is triggered when a chat is closed.
lcw:chatQueued	This event is raised when the chat conversation is created and started.
lcw:chatRetrieved	This event is raised when the system retrieves an ongoing chat conversation from cache after a page is reloaded or opened on another tab.
lcw:onClose	This event is triggered when the customer engaged on the chat widget closes the widget.
lcw:onMinimize	This event is triggered when the customer engaged on the chat widget minimizes the widget.
lcw:onMaximize	This event is triggered when the customer engaged on the chat widget maximizes the widget.
lcw:onMessageReceived	This event is triggered when the chat widget gets a new message.
lcw:onMessageSent	This event is triggered when a customer engaged on the chat widget sends a new message.
lcw:threadUpdate	This event is raised by live chat when an agent ends a conversation.
lcw:getAgentAvailability	This event is raised when the getAgentAvailability method returns a successful response.

See also

Omnichannel for Customer Service for developers

setContextProvider

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Sets the context provider. The context provider function, when invoked, returns the context to be used for initializing a chat session.

> **Important**
>
> - The setContextProvider method is supported only for unauthenticated chat. For authenticated chat, you must use the JSON Web Token (JWT). More information: **Send authentication tokens**
> - You can pass only 100 custom context variables during each chat session.
> - The live chat SDK methods should be invoked after the **lcw:ready event** is raised. You can listen for this event by adding your own event listener on the window object.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(contextProvider);
```

Parameters

Parameter	Type	Description
contextProvider	Function	Function that when invoked, returns the custom context

Return value

None

Example

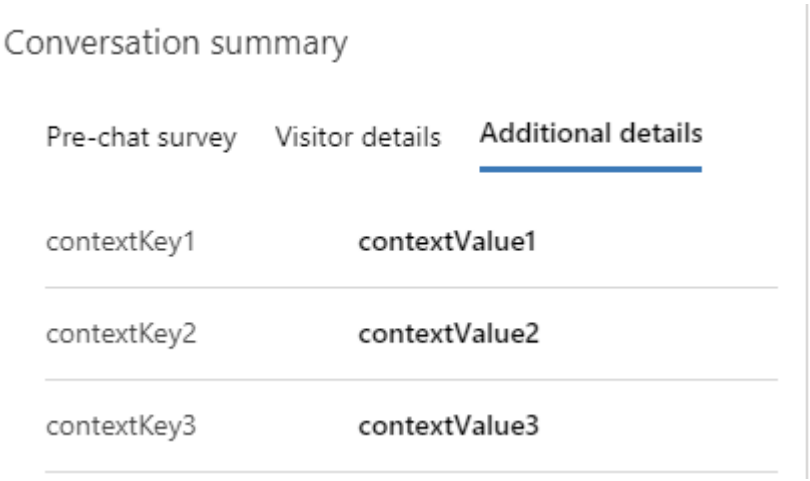
JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
        // Set the custom context provider
        // Throws error if contextProvider is not a function
        Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
                    //Here it is assumed that the corresponding work stream
would have context variables with logical name of 'contextKey1',
'contextKey2', 'contextKey3'. If no context variable exists with a matching
logical name, items are created assuming Type:string
                    return {
                                'contextKey1': {'value': 'contextValue1',
'isDisplayable': true},
                                'contextKey2': {'value': 12.34,
'isDisplayable': false},
                                'contextKey3': {'value': true}
                    };
        });
});
```

In the preceding sample code, the `value` attribute contains the value of the context variables.

The `isDisplayable` attribute, if set to `true`, will display the passed items in the third tab on the Conversation Summary Control for a conversation.

> **Note**
>
> If no context variables have been created under live workstream with a matching logical name, then the variables are created at runtime with the type String. More information: **Context variables**



Pass customer's self service as context

You can pass a customer's self service as context at the start of a conversation with that customer. The `setContextProvider` method passes the recent customer actions as part of context with self service type, for a new conversation between the customer and agent. A visitor journey record is created for each self service action.

Here's a sample code that shows how to use the `setContextProvider` method.

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){

Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
    return {
            'SelfService': { 'value' :
                '[ {"msdyn_displaytitle":"Page visited",
"msdyn_starttime":"yyyy-mm-ddThh:mm:ssZ","msdyn_type":192350000}, \
                  {"msdyn_displaytitle":"Phrase searched",
"msdyn_starttime":"yyyy-mm-ddThh:mm:ssZ","msdyn_type":192350001}, \
                  {"msdyn_displaytitle":"Knowledge article viewed",
"msdyn_starttime":"yyyy-mm-ddThh:mm:ssZ","msdyn_type":192350002}, \
                  {"msdyn_displaytitle":"Custom action performed",
"msdyn_starttime":"yyyy-mm-ddThh:mm:ssZ","msdyn_type":192350003} \
                 ]'
             }, // Additional context can be added as shown below
                //Here it is assumed that the corresponding work stream
would have context variables with logical name of 'contextKey1',
'contextKey2', 'contextKey3'. If no context variable exists with a matching
logical name, items are created assuming Type:string
                'contextKey1': {'value': 'contextValue1', 'isDisplayable':
true},
                'contextKey2': {'value': 12.34, 'isDisplayable': false},
                'contextKey3': {'value': true}
         };
    });
});
```

For the sample script to track self service actions that can be included in the Self Service Portal, see Self Service sample code.

Error codes

The following error can occur for this method.

Error code	Error message

Error code	Error message
1	Context provider method execution failed

See also

JavaScript API reference for live chat SDK
Display custom context

getContextProvider

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Retrieves the currently set custom context provider, if any.

> **Note**
>
> The live chat SDK methods should be invoked after the **lcw:ready event** is raised. You can listen for this event by adding your own event listener on the window object.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.getContextProvider();
```

Parameters

None

Return Value

Returns the currently set custom context provider, if any. If there is no registered custom context provider, then it returns null.

Example

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
   // Setting the custom context provider
   // Throws error if contextProvider is not a function
   Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
```

```
contextProvider(){
      // Here it is assumed that the corresponding work stream would have
context variables with logical name of 'contextKey1', 'contextKey2',
'contextKey3'.
      return {
                  'contextKey1': 'contextValue1', // string value
                  'contextKey2': 12.34, // number value
                  'contextKey3': true // boolean value
      };
   });

   // Retrieves the currently set custom context provider
   // If there is no registered custom context provider, then it returns
null
   let registeredContextProvider =
Microsoft.Omnichannel.LiveChatWidget.SDK.getContextProvider();
});
```

-->

See also

JavaScript API reference for Live chat SDK

removeContextProvider

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Removes the currently set custom context provider, if any.

> **Note**
>
> The live chat SDK methods should be invoked after the **lcw:ready event** is raised. You can listen for this event by adding your own event listener on the window object.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.removeContextProvider();
```

Parameters

None

Return value

None

Example

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
   // Set the custom context provider
   // Throws error if contextProvider is not a function
   Microsoft.Omnichannel.LiveChatWidget.SDK.setContextProvider(function
contextProvider(){
      // Here it is assumed that the corresponding work stream would have
```

```
context variables with logical name of 'contextKey1', 'contextKey2',
'contextKey3'.
      return {
                'contextKey1': 'contextValue1', // string value
                'contextKey2': 12.34, // number value
                'contextKey3': true // boolean value
      };
   });

   // Removes the currently set custom context provider, if any
   Microsoft.Omnichannel.LiveChatWidget.SDK.removeContextProvider();
});
```

See also

JavaScript API reference for live chat SDK

setAuthTokenProvider

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Sets the authentication token provider.

The authentication token provider function, when called with a callback function as a parameter, invokes the callback function with a valid JSON Web Token (JWT) string as the argument.
This method raises an error if the value of the `authTokenProvider` parameter is not a function.

Important

- In the payload of the JWT token, the value provided for `lwicontexts` key should be the serialized custom context.
- The custom context is a collection of key/value pairs. Only primitive values are allowed for any key.
- The keys of custom context must correspond to context variables that are created for the associated work stream in Omnichannel for Customer Service.
- The authentication token provider would be invoked by live chat widget when starting a new chat.

Note

The live chat SDK methods should be invoked after the **lcw:ready event** is raised. You can listen for this event by adding your own event listener on the window object.

This SDK is applicable only if authentication is enabled for the widget. To enable authentication for your widget, see Create chat authentication settings.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.setAuthTokenProvider(authTokenProvider);
```

Parameters

Parameter	Type	Description
authTokenProvider	Function	Function which when invoked with a callback function as an argument, fetches the JWT token and invokes the callback function with the JWT token as its argument

Return value

None

Example

Sample token payload

JSON

```
{
    "sub" : "87b4d06c-abc2-e811-a9b0-000d3a10e09e",
    "lwicontexts" :"{\"msdyn_cartvalue\":\"10000\",
\"msdyn_isvip\":\"false\"}",
    "iat" : 1542622071,
    "iss" : "contosohelp.com",
    "exp" : 1542625672,
    "nbf" : 1542622072
}
```

> **Note**
>
> In the above payload, the value corresponding to `lwicontexts` key should be the serialized custom context. The keys `msdyn_cartvalue` and `msdyn_isvip` in the serialized custom context correspond to context variables that are created for the associated work stream in Omnichannel for Customer Service.

JavaScript

```
let payloadToEncrypt = {
    "sub" : "87b4d06c-abc2-e811-a9b0-000d3a10e09e",
    "lwicontexts" :"{\"msdyn_cartvalue\":\"10000\",
\"msdyn_isvip\":\"false\"}",
    "iat" : 1542622071,
    "iss" : "contosohelp.com",
    "exp" : 1542625672,
    "nbf" : 1542622072
};

function convertToJwtToken(payloadToEncrypt){
    // Ideally, you call your service to convert the payload to a valid JWT
token
    return
Promise.resolve("eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJzdWIiOiI4N2I0ZDA2Yy
1hYmMyLWU4MTEtYTliMC0wMDBkM2ExMGUwOWUiLCJsd2ljb250ZXh0cyI6IntcIm1zZHluX2Nhcn
R2YWx1ZVwiOlwiMTAwMDBcIiwgXCJtc2R5bl9pc3ZpcFwiOlwiZmFsc2VcIn0iLCJpYXQiOjE1ND
I2MjIwNzEsImlzcyI6ImNvbnRvc29oZWxwLmNvbSIsImV4cCI6MTU0MjYyNTY3MiwibmJmIjoxNT
QyNjIyMDcyfQ.r37z1M5rMyRYMOJ-rhyTRYFOgvl9N7KvTMueSFPkiuM");
}

window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
// Sets the auth-token provider
// Throws error if authTokenProvider is not a function
    convertToJwtToken(payloadToEncrypt).then(function (jwtToken){

 Microsoft.Omnichannel.LiveChatWidget.SDK.setAuthTokenProvider(function
authTokenProvider(callback){
            callback(jwtToken);
        });
    });
});
```

Error codes

The following errors can occur with this method.

Error code	Error message
2	Auth token provider method execution failed
3	Auth token provider didn't provide any token
4	Auth token provider provided invalid token

See also

JavaScript API reference for live chat SDK

getAuthTokenProvider

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Gets the currently set authentication token provider, if any.

> **Note**
>
> The live chat SDK methods should be invoked after the **lcw:ready event** is raised. You can listen for this event by adding your own event listener on the window object.

This SDK is applicable only if authentication is enabled for the widget. To enable authentication for your widget, see Create chat authentication settings.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.getAuthTokenProvider();
```

Parameters

None

Return Value

Returns the currently set authentication token provider, if any. If there is no registered authentication token provider, then it returns null.

Example

JavaScript

```
let payloadToEncrypt = {
    "sub" : "87b4d06c-abc2-e811-a9b0-000d3a10e09e",
    "lwicontexts" :"{\"msdyn_cartvalue\":\"10000\",
\"msdyn_isvip\":\"false\"}",
    "iat" : 1542622071,
    "iss" : "contosohelp.com",
    "exp" : 1542625672,
    "nbf" : 1542622072
};

function convertToJwtToken(payloadToEncrypt){
    // Ideally, you should call your service to convert the payload to a
valid JSON Web Token
    return
Promise.resolve("eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJzdWIiOiI4N2I0ZDA2Yy
1hYmMyLWU4MTEtYTliMC0wMDBkM2ExMGUwOWUiLCJsd2ljb250ZXh0cyI6IntcIm1zZHluX2Nhcn
R2YWx1ZVwiOlwiMTAwMDBcIiwgXCJtc2R5bl9pc3ZpcFwiOlwiZmFsc2VcIn0iLCJpYXQiOjE1ND
I2MjIwNzEsImlzcyI6ImNvbnRvc29oZWxwLmNvbSIsImV4cCI6MTU0MjYyNTY3MiwibmJmIjoxNT
QyNjIyMDcyfQ.r37z1M5rMyRYMOJ-rhyTRYFOgvl9N7KvTMueSFPkiuM");
}

window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
// Sets the auth-token provider
// Throws an error if authTokenProvider is not a function
    convertToJwtToken(payloadToEncrypt).then(function (jwtToken){

Microsoft.Omnichannel.LiveChatWidget.SDK.setAuthTokenProvider(function
authTokenProvider(callback){
            callback(jwtToken);
        });

        // Gets the currently set authentication token provider
        // If there is no registered authentication token provider, then it
returns null
        let registeredAuthTokenProvider =
Microsoft.Omnichannel.LiveChatWidget.SDK.getAuthTokenProvider();
    });
});
```

See also

JavaScript API reference for Live chat SDK

removeAuthTokenProvider

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Removes the currently set authentication token provider, if any.

> **Note**
>
> The live chat SDK methods should be invoked after the **lcw:ready event** is raised. You can listen for this event by adding your own event listener on the window object.

This SDK is applicable only if authentication is enabled for the widget. To enable authentication for your widget, see Create chat authentication settings.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.removeAuthTokenProvider();
```

Parameters

None

Return value

None

Example

JavaScript

```
let payloadToEncrypt = {
    "sub" : "87b4d06c-abc2-e811-a9b0-000d3a10e09e",
```

```
    "lwicontexts" :"{\"msdyn_cartvalue\":\"10000\",
\"msdyn_isvip\":\"false\"}",
    "iat" : 1542622071,
    "iss" : "contosohelp.com",
    "exp" : 1542625672,
    "nbf" : 1542622072
};

function convertToJwtToken(payloadToEncrypt){
    // Ideally, you call your service to convert the payload to a valid JSON
Web Token
    return
Promise.resolve("eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJzdWIiOiI4N2I0ZDA2Yy
1hYmMyLWU4MTEtYTliMC0wMDBkM2ExMGUwOWUiLCJsd2ljb250ZXh0cyI6IntcIm1zZHluX2Nhcn
R2YWx1ZVwiOlwiMTAwMDBcIiwgXCJtc2R5bl9pc3ZpcFwiOlwiZmFsc2VcIn0iLCJpYXQiOjE1ND
I2MjIwNzEsImlzcyI6ImNvbnRvc29oZWxwLmNvbSIsImV4cCI6MTU0MjYyNTY3MiwibmJmIjoxNT
QyNjIyMDcyfQ.r37z1M5rMyRYMOJ-rhyTRYFOgvl9N7KvTMueSFPkiuM");
}

window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
// Sets the auth-token provider
// Throws error if authTokenProvider is not a function
    convertToJwtToken(payloadToEncrypt).then(function (jwtToken){

Microsoft.Omnichannel.LiveChatWidget.SDK.setAuthTokenProvider(function
authTokenProvider(callback){
            callback(jwtToken);
        });

        // Removes the currently set authentication token provider
        Microsoft.Omnichannel.LiveChatWidget.SDK.removeAuthTokenProvider();
    });
});
```

See also

JavaScript API reference for Live chat SDK

setBotAuthTokenProvider

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The bot authentication token provider function, when called with a callback function as a parameter, returns the `botAuthUrl` to send the token to the bot and invokes the callback function to set the sign-in card visibility.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.setBotAuthTokenProvider(authTokenProvider);
```

Parameters

Parameter	Type	Description
authTokenProvider	Function	Function which when invoked with a callback function as parameter, returns the `botAuthUrl` to send the token to the bot and invokes the callback function to set the sign-in card visibility.

Return value

Bot authentication URL.

Example

Here's a code sample that illustrates how you can pass an authentication token to an Azure or Power Virtual Agents bot during single sign-on.

JavaScript

```
const signInIds = [];
window.Microsoft.Omnichannel.LiveChatWidget.SDK.setBotAuthTokenProvider(asyn
```

```
c (botTokenUrl, callback) => {
  const urlSearchParams = new URLSearchParams(botTokenUrl);
  const signInId = urlSearchParams.get("state");

  if (signInIds.includes(signInId)) { // Ignore authenticated sign-in cards
    callback({show: false});  // Hide card
    return;
  }

  signInIds.push(signInId);

  const authUrl = ""; // Customer's Authentication API
  const authResponse = await fetch(authUrl, method: "POST"});
  const {token} = authResponse;  // Customer's Auth Token

  const data = {
    token: "token"
  };

  const payload = {
    method: "POST",
    headers: {
      "Content-Type": "application/json"
    },
    body: JSON.stringify(data)
  };

  try {
    const botAuthResponse = await fetch(botTokenUrl, payload); // Posts Auth
Token to Bot directly

    // Sign in through Bot is successful
    if (botAuthResponse.status === 200) {
      signInIds.push(signInId); // Track authenticated sign-in card
      callback({show: false}); // Hide card
    }

    if (botAuthResponse.status === 404 || botAuthResponse.status == 202) {
      callback({show: false}); // Hide card
      return;
    } else {
      // Other condition handling
    }

    return;
  } catch (error) {

  }

  callback({show: true});  // Show sign-in card by default
});
```

See also

JavaScript API reference for live chat SDK

Pass authentication token to bot during single sign-on in live chat

startChat

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Opens an existing chat, if any. Otherwise, it initiates a new chat.

> **Note**
>
> Listen to the **lcw:ready** event raised by a live chat before calling the live chat SDK methods. The live chat methods should be invoked after the **lcw:ready** event is raised. You can listen for this event by adding your own event listener on the window object.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.startChat({inNewWindow: inNewWindowValue});
```

Parameters

Parameter	Type	Required	Description
`inNewWindow`	Boolean	No	Decides whether to open the chat in a new window.

Return value

None

Example

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
                // Opens an existing chat, if any. Else initiates a new chat

Microsoft.Omnichannel.LiveChatWidget.SDK.startChat({inNewWindow: true});
});
```

See also

setAuthTokenProvider

setContextProvider

JavaScript API reference for live chat SDK

startProactiveChat

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Enables organizations to engage users by automatically inviting them to a chat conversation based on the configured rules. Organizations can use end-user data, user journey information, time spent on web page, and more to decide when to proactively engage customers through chat. Organizations can control the proactive chat experience using personalized trigger messages and configurable rules to define the target audience, time frame, and target location.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat(notificationUIConfig: notificationUIConfigObject, showPrechat, { inNewWindow: inNewWindowValue });
```

Parameters

Parameter	Type	Required	Description
`notificationUIConfig`	Object	Yes	Allows you to pass UI configurations for proactive chat notification. This object lets you customize the notification, including the message to be displayed.
`showPrechat`	Boolean	No	Boolean flag to indicate whether prechat is shown if configured for the widget. The default value is `true`.
`inNewWindow`	Boolean	No	Decides whether to open the chat in a new window. This parameter resides within an options object.

Important

If no message is provided in the `notificationUIConfig` object, then the default message, "Hi! Have any questions? I'm here to help" gets displayed.

Return value

None

Example

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
                Microsoft.Omnichannel.LiveChatWidget.SDK.startProactiveChat(
                  {message: "Hi! How are you doing today? Do you wish to
start a chat?"},
                    true,
                    {
                            inNewWindow: true
                    }
            );
});
```

See also

Live chat JavaScript API reference
Start a chat
Start a chat proactively

closeChat

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Ends the conversation between the agent and customer. Any browser cache related to the conversation is also deleted.

> **Note**
>
> Listen for the **lcw:ready** event raised by a live chat before calling the live chat SDK methods. The live chat methods should be invoked after the **lcw:ready** event is raised. You can listen for this event by adding your own event listener on the window object.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.closeChat();
```

Parameters

None

Return Value

None

Example

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
                // Closes an existing chat
```

```
                Microsoft.Omnichannel.LiveChatWidget.SDK.closeChat();
});
```

See also

startChat
setContextProvider
Live chat SDK JavaScript API reference

getAgentAvailability

Article • 10/20/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Retrieves the agent availability for a queue based on the routing rules. The omnichannel developer can use this API to determine whether the start conversation option should be visible to the customer and also for displaying information such as wait time and position in queues.

> **Note**
>
> - Listen for the **lcw:ready** event raised by a live chat before calling the live chat SDK methods. The live chat methods should be invoked after the **lcw:ready** event is raised. You can listen for this event by adding your own event listener on the window object.
> - This method can be called multiple times from the client side when customer input changes. The client side cache is refreshed every 2 minutes or when the customer context parameters change.
> - This method can be called 100 times per minute per organization only. If you've exceeded the limit, you'll see the http 429 response status code that indicates that you've sent too many requests in a specified amount of time.

Syntax

```
Microsoft.Omnichannel.LiveChatWidget.SDK.getAgentAvailability();
```

Parameters

None

Return value

Name	Type	Description
`queueId`	String	The target queue where the request will be routed based on routing rule configuration and input data (value of entity and context which are part of routing rule are provided).
`isQueueAvailable`	Boolean	Displays: - TRUE if the queue is within operating hours. - FALSE if the queue is outside operating hours.
`StartTimeOfNextOperatingHour`	DateTime	The start time (UTC) of operating hours for the queue if it's outside operating hours. During operating hours, a value of 01-01-0001 is returned.
`EndTimeOfNextOperatingHour`	DateTime	The time (UTC) when operating hours end for the queue if it's outside operating hours. During operating hours, a value of 01-01-0001 is returned.
`nexttransitiontime`	DateTime	The time (UTC) when the queue is operational again if it's outside operating hours. The time when the queue is not operational is displayed during operating hours.
`positionInQueue`	Number	The position in queue for a customer waiting behind other customers in the same queue.
`isAgentAvailable`	Boolean	Displays: - TRUE if agents in the queue are currently available to take requests based on configured routing and assignment rules for workstream. - FALSE if agents aren't available to take requests.
`averageWaitTime`	Number	Average wait time in minutes for customers in the target queue based on past 48-hour data.

Example

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
                // Gets the agent availability

Microsoft.Omnichannel.LiveChatWidget.SDK.getAgentAvailability();
});
```

See also

startChat
setContextProvider
Live chat SDK reference

lcw:ready event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is raised when the live chat SDK is ready to use.

Example

JavaScript

```
window.addEventListener("lcw:ready", function handleLivechatReadyEvent(){
                // Handle livechat ready event
                // SDK methods are ready for use now
});
```

See also

lcw:startChat
lcw:closeChat
lcw:error
lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:onMinimize
lcw:onMaximize
lcw:onMessageReceived
lcw:onMessageSent
lcw:threadUpdate
Live chat SDK reference

lcw:startChat event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is triggered when a chat is started.

Lcw:startChat is raised when the related startChat() SDK method is called.

When a customer starts a chat, a call is made to the startChat() SDK method. This event is then raised when the startChat() SDK method is called.

Example

JavaScript

```
window.addEventListener("lcw:startChat", function
handleLivechatStartedEvent(){
    // Handle the live chat started event
});
```

See also

lcw:ready
lcw:error
lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:closeChat
lcw:ready
lcw:onMinimize
lcw:onMaximize

lcw:onMessageReceived

lcw:onMessageSent

lcw:threadUpdate

Live chat SDK JavaScript API reference

lcw:closeChat event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is triggered when a chat is closed.

Example

JavaScript

```
window.addEventListener("lcw:closeChat", function
handleLivechatClosedEvent(){
// Handle the live chat closed event
});
```

See also

lcw:ready
lcw:error
lcw:startChat lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:onMinimize
lcw:onMaximize
lcw:onMessageReceived
lcw:onMessageSent
lcw:threadUpdate

Live chat SDK JavaScript API reference

lcw:onClose event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is triggered when the customer engaged on the chat widget has closed the widget. You can use this event to create custom experiences around closure of the chat widget.

When an agent ends a conversation, a call can be made to closeChat() in order to end the conversation on the client side. This event is raised when the closeChat() SDK method is called.

Example

JavaScript

```
window.addEventListener("lcw:onClose", function handleWidgetCloseEvent(){ //
Handle the live chat widget close event });
```

See also

lcw:ready
lcw:error
lcw:chatRetrieved
lcw:chatQueued
lcw:closeChat
lcw:startChat
lcw:onMinimize
lcw:onMaximize
lcw:onMessageReceived

lcw:onMessageSent

lcw:threadUpdate

Live chat SDK JavaScript API reference

lcw:threadUpdate event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is raised by live chat when an agent ends a conversation.

Listen for the `lcw:threadUpdate` event, and call the closeChat method to end the conversation from the client side. You can listen for this event by adding your own event listener on the window object.

Example

JavaScript

```
window.addEventListener("lcw:threadUpdate", function
handleLivechatThreadUpdateEvent(){
        // Handle the live chat threadUpdate event, for example:
        // End the conversation using the closeChat method
        Microsoft.Omnichannel.LiveChatWidget.SDK.closeChat();
});
```

See also

lcw:ready
lcw:error
lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:closeChat
lcw:ready
lcw:onMinimize

lcw:onMaximize

lcw:onMessageReceived

lcw:onMessageSent

lcw:startChat

Live chat SDK JavaScript API reference

lcw:chatQueued event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is raised when the chat conversation is created and started.

Example

JavaScript

```
window.addEventListener("lcw:chatQueued", function
handleLivechatQueuedEvent(){
    // Handle livechat queued event
});
```

See also

lcw:ready
lcw:error
lcw:chatRetrieved
lcw:onClose
lcw:ready
lcw:closeChat
lcw:onMinimize
lcw:onMaximize
lcw:onMessageReceived
lcw:onMessageSent
lcw:threadUpdate
Live chat SDK JavaScript API reference

lcw:chatRetrieved event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is raised when an ongoing chat conversation is retrieved from cache after a page reload or is opened on another tab.

Example

JavaScript

```
window.addEventListener("lcw:chatRetrieved", function
handleLivechatRetrievedEvent(){
    // Handle livechat retrieved event
});
```

See also

lcw:ready
lcw:error
lcw:chatQueued
lcw:onClose
lcw:ready
lcw:closeChat
lcw:onMinimize
lcw:onMaximize
lcw:onMessageReceived
lcw:onMessageSent
lcw:threadUpdate
Live chat SDK JavaScript API reference

lcw:onMinimize event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is triggered when the customer engaged on the chat widget minimizes the widget. You can use this event to create custom experiences around this activity. For example, if you have implemented a custom button, you can update your button to reflect that the chat has been minimized.

Example

JavaScript

```
window.addEventListener("lcw:onMinimize", function
handleWidgetMinimizeEvent(){ // Handle the live chat widget minimize event
});
```

See also

lcw:ready
lcw:error
lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:startChat
lcw:closeChat
lcw:onMaximize
lcw:onMessageReceived
lcw:onMessageSent

lcw:threadUpdate

Live chat SDK JavaScript API reference

lcw:onMaximize event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is triggered when the customer engaged on the chat widget maximizes the widget. You can use this event to create custom experiences around this activity. For example, if you have implemented a custom button, you can update your button to reflect that the chat is currently launched and ongoing.

Example

JavaScript

```
window.addEventListener("lcw:onMaximize", function
handleWidgetMaximizeEvent(){ // Handle the live chat widget maximize event
});
```

See also

lcw:ready
lcw:error
lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:closeChat
lcw:startChat
lcw:onMinimize
lcw:onMessageReceived
lcw:onMessageSent

lcw:threadUpdate

Live chat SDK JavaScript API reference

lcw:onMessageReceived event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The `lcw:onMessageReceived` event is triggered when the chat widget gets a new message. You can use this event to create custom experiences for the user. For example, play a sound notification or update the page title to catch the user eye for the new message.

Users such as an agent in Dynamics 365 can send the message or the system can send an automated message. So, the possible values for `messageType` are "user" and "system".

This event will contain data in the payload to explain the source of the message.

Sample payload

Agent assigned

JSON

```
{

"channelData": {

"tags": [
    "system",
    "agentassignmentready"
],

},
"messageType": "system"

}
```

Agent accepted

JSON

```
{

"channelData": {

"tags": [
    "system",
    "agentaccepted"
],

},
"messageType": "system"

}
```

Agent sent a message

JSON

```
{

"channelData": {

"tags": [
    "public",
    "client_activity_id:1612311164266bkaspzvq05b"
],

},
"messageType": "user"

}
```

Agent ended the conversation

JSON

```
{

"channelData": {

"tags": [
    "system",
    "agentendconversation"
],

},
"messageType": "system"
```

```
}
```

Agent ended the session

JSON

```
{

"channelData": {

"tags": [
    "system",
    "primarysessionclosed"
],

},
"messageType": "system"

}
```

Agent assignment failed

JSON

```
{

"channelData": {

"tags": [
    "system",
    "agentassignmentfailure"
],

},
"messageType": "system"

}
```

Queue position

JSON

```
{

"channelData": {

"tags": [
    "system",
    "queueposition",
```

```
    "customerqueuepositionnext"
],

},
"messageType": "system"

}
```

Example

JavaScript

```
window.addEventListener("lcw:onMessageReceived", function
handleWidgetMessageReceivedEvent(payload){ // Handle the live chat widget
message sent event });
```

See also

lcw:ready
lcw:error
lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:closeChat
lcw:startChat
lcw:onMinimize
lcw:onMaximize
lcw:onMessageSent
lcw:threadUpdate
Live chat SDK JavaScript API reference

lcw:onMessageSent event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is triggered when a new message is sent by the customer engaged on the chat widget. You can use this event to create custom experiences around when users send a message. For example, this event can be used to detect user activity and engagement on the chat widget.

Example

JavaScript

```
window.addEventListener("lcw:onMessageSent", function
handleWidgetMessageSentEvent(){ // Handle the live chat widget message sent
event });
```

See also

lcw:ready
lcw:error
lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:closeChat
lcw:startChat
lcw:onMinimize
lcw:onMaximize
lcw:onMessageReceived

lcw:threadUpdate

Live chat SDK JavaScript API reference

lcw:getAgentAvailability event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is raised when the getAgentAvailability method returns a successful response.

Example

JavaScript

```
window.addEventListener("lcw:getAgentAvailability", function
handlegetAgentAvailabilityEvent(){
    // Handle getAgentAvailability event
});
```

See also

lcw:ready
lcw:error
lcw:chatQueued
lcw:onClose
lcw:ready
lcw:closeChat
lcw:onMinimize
lcw:onMaximize
lcw:onMessageReceived
lcw:onMessageSent
lcw:threadUpdate
Live chat SDK reference

lcw:error event (Omnichannel for Customer Service JavaScript API reference)

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This event is raised in case an error occurs during the lifetime of a chat.

For information about error codes and error messages, see the Error code reference for Omnichannel for Customer Service.

Example

The sample code given below shows how the errorEvent is caught and how the error details are obtained.

JavaScript

```
window.addEventListener("lcw:error", function (errorEvent) {
    let errorDetail = errorEvent.detail; // Object containing details about
the error event
    let errorCode = errorEvent.detail.errorCode; // Error code corresponding
to the error event
    let errorDescription = errorEvent.detail.errorDescription; //
Description of the error
});
```

See also

lcw:ready
lcw:chatRetrieved
lcw:chatQueued
lcw:onClose
lcw:closeChat

lcw:startChat
lcw:onMinimize
lcw:onMaximize
lcw:onMessageReceived
lcw:onMessageSent
lcw:threadUpdate

JavaScript API reference for Live chat SDK

Error code reference for Omnichannel for Customer Service

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Here are the error codes and error messages that are returned by the live chat SDK methods.

Error code	Error message
1	Custom context provider method execution failed
2	Auth token provider method execution failed
3	Auth token provider didn't provide any token
4	Auth token provider provided invalid token
7	Live chat widget scripts failed to load
8	Auth function cannot be found on webpage

> **Note**
>
> The live chat widget script can fail to load for a number of reasons. One possible reason is the user has disabled access to session and local storage in their browser. The reason will be described in the `errorDetail` attribute.

Here's a sample `errorEvent` object that's raised when the context provider method fails to run.

JSON

```
{
    detail: {
        errorCode: 1, // Error code corresponding to the error event
        errorDescription: "Context provider method execution failed" //
```

```
Description of the error
    }
}
```

See also

Live chat SDK reference
Developer guide

getTranslationProvider

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This property is required to be set in web resource. It is called once, after the agent has logged in to Omnichannel for Customer Service. It helps Omnichannel for Customer Service to know the functions to be called for initializing a conversation and translating a message.

> **Important**
>
> See this **sample web resource** for more information on how to set the `getTranslationProvider` property.

Syntax

`window.Microsoft.Omnichannel.TranslationFramework.getTranslationProvider`

Type of object to be assigned

A function is required to be assigned to the property. The function should have no input parameters and should return a JavaScript object implementing following interface:

JSON

```
interface {
        initializeNewConversation: function,  // Required field, Function to
be called to initialize a conversation
        translateMessage: function;      // Required field, Function to be
called to translate a message
}
```

The `initializeNewConversation` parameter in above interface represents a function which will be called to initialize a conversation. More information:

initializeNewConversation

The `translateMessage` parameter in above interface represents a function which will be called to translate a message. More information: translateMessage.

A sample of setting the `getTranslationProvider` property is as follows.

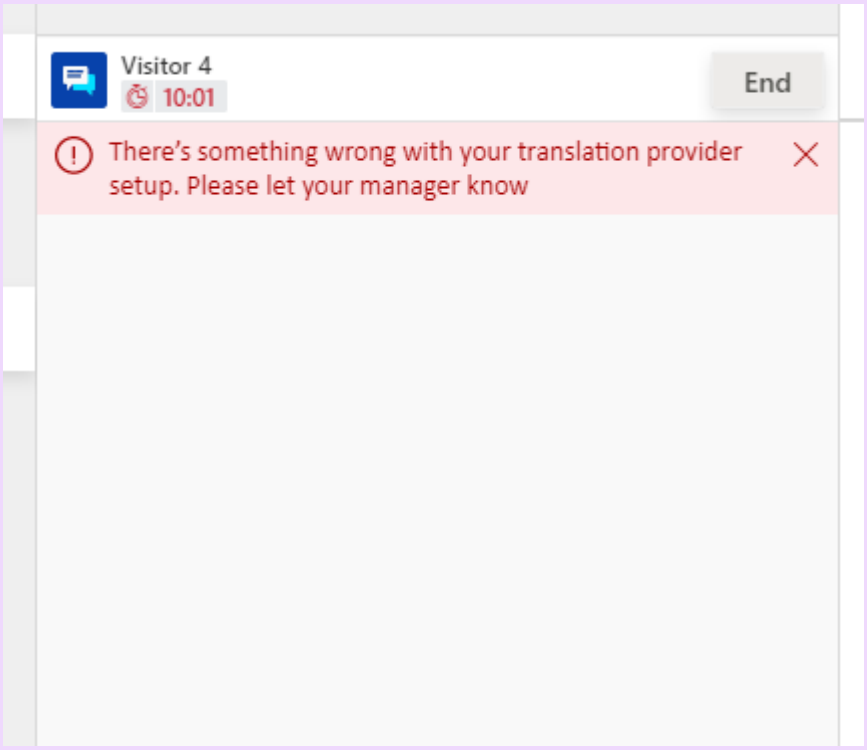
JSON

```
/*
The following code has been copied from the link:
https://github.com/microsoft/Dynamics365-Apps-
Samples/blob/06e9c84263bac81e7411f95365c5e792aca15122/customer-
service/omnichannel/real-time-translation/webResourceV2.js#L452

Read and understand the following code in the context of the javacript file
that is mentioned in the preceding line.
*/
window.Microsoft.Omnichannel.TranslationFramework.getTranslationProvider =
function () {
    return {
        initializeNewConversation:
C1WebResourceNamespace.initializeNewConversationInWebResource,
        translateMessage:
C1WebResourceNamespace.translateMessageInWebResource
    }
};
```

Note

- On exception in the assigned function or invalid return values from the assigned function, Omnichannel for Customer Service will keep translation off for the conversation and might behave abnormally.

- If this property is not set, the following error will be displayed to the agent.



See also

Add a web resource for real-time translation

initializeNewConversation

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This method is required to be implemented in web resource. It is called once, as soon as a new conversation invitation is accepted or an existing conversation is opened from Agent Dashboard.

1. You can choose to turn off or turn on the translation for a particular conversation using certain conditions; for example, you would like to turn the translation on if the agent and customer languages are different.
2. You can also override the agent's language to be used in translation for the conversation.
3. It provides you information about the conversation to take certain decisions, for example, the translation API engine that should be used for a conversation.

> **Important**
>
> See this **sample web resource** for more information on how to implement the `initializeNewConversation` API.

Syntax

```
function (conversationConfig): Object
```

Parameters

Name	Required	Type	Description

Name	Required	Type	Description
`conversationConfig`	Yes	JavaScript object	Provides details about conversation. Such as conversation id, default agent input language (From Real-time translation administrator configuration) etc. More details are available in the following paragraphs.

Here is the structure of `conversationConfig` parameter.

JSON

```
interface InviteParams {// Parameters received on a conversation invite
        inviteLocale: string;  //Language locale of the channel from where
conversation is received. This contains locale ID, example- "1033" for
english.
        channelType: string;   //The type of the channel, example- "lcw" for
chat widget, "facebook" for facebook.
}


interface conversationConfig {
        conversationId: string,  // Unique Id for conversation in
Omnichannel for Customer Service
        c1Language: string;      // Default agent input language (From Real
time translation administrator configuration)
        inviteParams: InviteParams;  // Implements InviteParams interface,
Represents the parameters received on a conversation invite
}
```

The `inviteLocale` parameter in `InviteParams` interface represents a Locale ID. More information: Locale ID.

The `channelType` parameter in `InviteParams` interface represents a supported channel in Omnichannel for Customer Service. The channels are listed as follows.

Name	Description
`"lcw"`	For Live Chat Widget channel
`"sms"`	For SMS channel
`"facebook"`	For Facebook channel
`"twitter"`	For Twitter channel
`"custom"`	For custom made channel

Name	Description
`"wechat"`	For WeChat channel
`"whatsapp"`	For WhatsApp channel
`"msteams"`	For Microsoft Teams channel
`"line"`	For Line channel
`"phonecall"`	For phone call channel

A sample of the `conversationConfig` parameter is as follows.

JSON

```
conversationConfig = {
  "conversationId": "2f67af9e-c05a-4784-aaea-916d6938fcea",
  "c1Language": "1033",
  "inviteParams": {
    "inviteLocale": "3082",
    "channelType": "lcw"
  }
}
```

Return Value

Returns a promise that resolves to the following JavaScript object.

JavaScript

```
{
        keepTranslationOn: boolean;// mandatory field, if true the
translation would be turned on for the conversation and vice-versa
        c1Language?: string;// optional field, return the agent's language
if input param conversationConfig.c1Language needs to be overriden for the
conversation
}
```

The `c1Language` parameter in resolved JavaScript object represents a Locale ID only from the following list.

Locale ID	Language
`"1033"`	English
`"1025"`	Arabic

Locale ID	Language
`"1069"`	Basque
`"1027"`	Catalan
`"1026"`	Bulgarian
`"1050"`	Croatian
`"1029"`	Czech
`"1030"`	Danish
`"1043"`	Dutch
`"1061"`	Estonian
`"1035"`	Finnish
`"1036"`	French
`"1110"`	Galician
`"1031"`	German
`"1032"`	Greek
`"1037"`	Hebrew
`"1081"`	Hindi
`"1038"`	Hungarian
`"1040"`	Italian
`"1057"`	Indonesian
`"1041"`	Japanese
`"1087"`	Kazakh
`"1042"`	Korean
`"1062"`	Latvian
`"1063"`	Lithuanian
`"1086"`	Malay
`"1044"`	Norwegian Bokmal

Locale ID	Language
`"1045"`	Polish
`"1046"`	Portuguese - Brazil
`"2070"`	Portuguese - Portugal
`"1048"`	Romanian
`"1049"`	Russian
`"3098"`	Serbian (Cyrillic)
`"2074"`	Serbian (Latin)
`"1051"`	Slovak
`"1060"`	Slovenian
`"3082"`	Spanish
`"1053"`	Swedish
`"1054"`	Thai
`"1055"`	Turkish
`"1058"`	Ukrainian
`"1066"`	Vietnamese
`"2052"`	Chinese - China
`"3076"`	Chinese - Hong Kong SAR

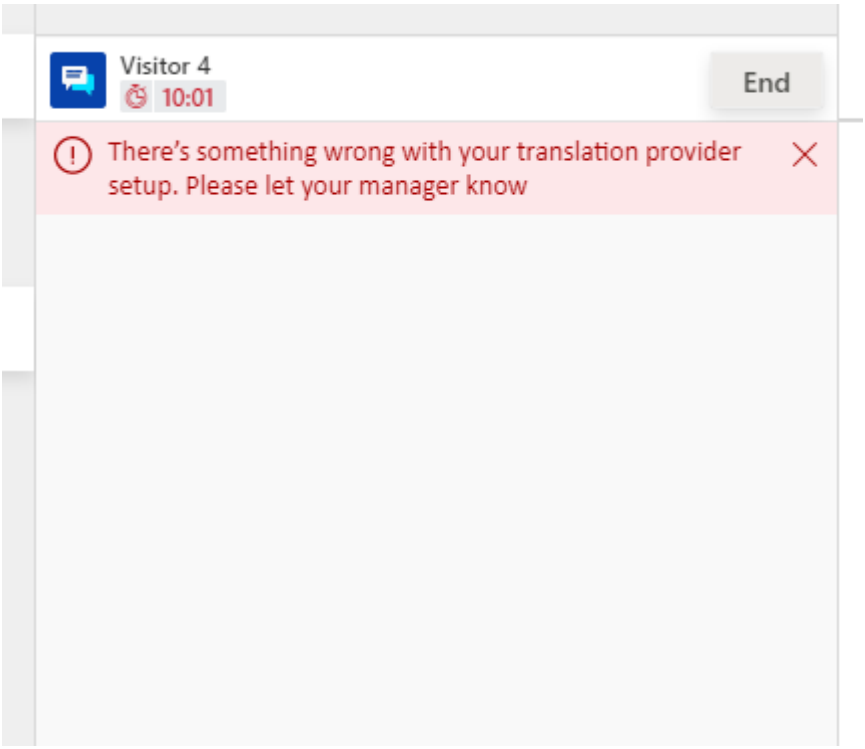
Sample expected response

JSON

```
{

  "keepTranslationOn": true,
  "c1Language": "1033"

}
```

Additional Information

- On exception in this method or invalid return values, Omnichannel for Customer Service will keep translation off for the conversation. For example: if resolved JavaScript object from the returned promise does not contains `keepTranslationOn` field or `c1Language` field contains a value that is not from list of Locale IDs, the conversation will start with translation turned off.
- Consider including minimal processing in this function because it makes the UI wait before rendering. If the run time of this function exceeds 30 seconds, the conversation will start with translation turned off, irrespective of the values of the returned promise.
- If this method is not implemented, the following error will be displayed to the agent.



See also

Add a web resource for real-time translation

translateMessage

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This method is required to be implemented in web resource. This method is called for every conversation message exchanged between the customer and the agent, if translation is on and if the message has not been translated earlier in the conversation for the destination language.

> **Important**
>
> See this **sample web resource** for more information on how to implement the `translateMessage` API.

Syntax

```
function (conversationId, translationConfig): Object
```

Parameters

Name	Type	Description
`translationConfig`	JavaScript object	Consists of `conversationId`, `messagePayload` and `translateToC1orC2` key-value pairs.

Here's the structure of `translationConfig` parameter.

JSON

```
export class UserType {
        public static readonly C1 = "Agent"; //Used if the sender of the
message is agent
        public static readonly C2 = "Customer"; //Used if the sender of the
message is customer
```

```
        public static readonly CONSULT = "Consult Agent"; //Used if the
sender of the message is other than agent or customer
}

export class TranslateTo {
        public static readonly C1 = "Agent"; //Used if message is translated
for agent
        public static readonly C2 = "Customer"; //Used if message is
translated for customer
}

export class MessageContentType {
        public static readonly Text = "Text"; //Used if the content type is
text
}

interface Sender {
        userType: UserType;  //Points to any static field in UserType
type,Represents the type of the user who is sending this message
}

interface MessagePayload {
        content: string;                //Contains the content to be
translated
        contentType: MessageContentType;  //Points to any static field in
MessageContentType type,Represents the type of message content. For example:
"Text" etc.
        sender: Sender; //Implements Sender interface, Represents the sender
of the message
}

interface translationConfig {
        conversationId: string;   //Unique Id for conversation in
Omnichannel for Customer Service
        messagePayload: MessagePayload;  //Implements MessagePayload
interface, Represents the payload for the message to be translated
        translateToC1orC2: TranslateTo;   //Points to any static field in
TranslateTo type,Represents for whom the message has to be translated
 }
```

Here's a sample of the `conversationConfig` parameter.

JSON

```
translationConfig = {
  "conversationId": "2b330c52-6844-4d36-8e05-03c78c9681dc",
  "messagePayload": {
    "content": "Hello",
    "contentType": "Text",
    "sender": {
      "userType": "Agent"
    }
  },
```

```
  "translateToC1orC2": "Customer"
}
```

Return value

Returns a promise that resolves to a JavaScript object implementing `TranslatedMessageResponse` interface.

Interface object

JavaScript

```
export interface ErrorObject{
        isError: boolean; //mandatory field, represents true for error while executing this function else no
        errorCode: ErrorCodes; //mandatory field, represents the type of error based on errorCode
}

export interface TranslatedMessageResponse {
        translatedMessage: string;  //mandatory field, Contains the translated message
        sourceLanguage: string;       //mandatory field, represents the language locale of the original content
        destinationLanguage: string;  //mandatory field, represents the language locale of the translated content
        errorObject?: ErrorObject;  //optional field, represents the error object for any error scenarios
}
```

The `errorCode` parameter in `ErrorObject` represents the errors only from the following list.

Error message	Error code	Description
MESSAGE_TOO_LONG	100	Error code for very long message which the translation service cannot translate
LANGUAGE_NOT_SUPPORTED	101	Error Code for language not supported by the translation service
MESSAGE_NOT_TRANSLATED	102	Error Code for message not translated by the translation service
TRANSLATION_SERVICE_LIMIT_EXCEEDED	103	Error code if the quota limit exceeded for the translation service

Error message	Error code	Description
TRANSLATION_FAILED	104	Error Code if the translation service failed to translate a message
UNRECOGNIZED_TEXT	105	Error Code if the text is not recognized by the translation service
UNRECOGNIZED_ERROR	200	Error Code if there is any error other than the listed one.

The `sourceLanguage` and `destinationLanguage` parameter in `TranslatedMessageResponse` interface represents a Locale ID. More information: Locale ID.

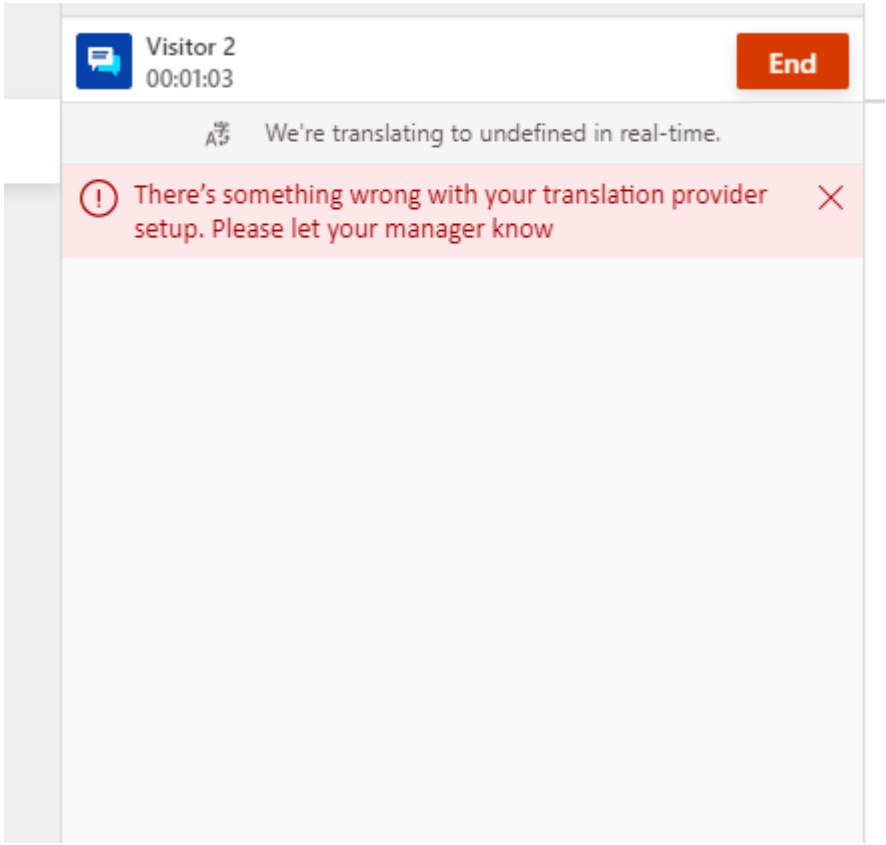
Sample response

JSON

```
{
  "translatedMessage": "Hola",
  "destinationLanguage": "3082",
  "errorObject": {
    "isError": false,
    "errorCode": null
  },
  "sourceLanguage": "3082"
}
```

Note

- In case of an exception during execution of this method, Omnichannel for Customer Service will not retry and instead will display a translation failed error message.
- Error while executing this method can be notified via `errorObject`. In case of an error, Omnichannel for Customer Service will not retry and instead will display the error message based on the provided error codes.
- In case the returned response is invalid or incomplete, an error message on the translation banner will appear in the conversation control.
- If this method is not implemented, then the message will not be translated and the following error message will be displayed to the agent.



See also

Add a web resource for real-time translation

Omnichannel JavaScript API Reference

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The following JavaScript methods can be used to perform various operations with the Omnichannel for Customer Service SDK.

Methods

Method	Description
getConversationId	Gets the unique GUID of the current ongoing conversation in a session.
getConversations	Gets a list of conversation (`msdyn_ocliveworkitem`) records for an agent.
openConversation	Opens a conversation as a session programmatically.
linkToConversation	Links the account, contact, or incident records to the conversation in the focused session.
unlinkFromConversation	Unlinks an already linked entity record of type customer (account or contact) or case from a conversation.
sendMessageToConversation	Sends messages to a conversation programmatically.

See also

Omnichannel for Customer Service for developers
Live chat SDK reference

getConversationId

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This function can be called to fetch the unique GUID of the current ongoing conversation in a session. The conversation ID remains the same after the conversation is closed. The identifier can be used to fetch the conversation record programmatically.

Syntax

```
Microsoft.Omnichannel.getConversationId();
```

Parameters

None

Return value

Returns a promise resolved with currently ongoing conversation ID.

Example

```
Microsoft.Omnichannel.getConversationId();
```

See also

Live chat SDK reference
Omnichannel JavaScript API reference
getConversations
linkToConversation
unlinkFromConversation

openConversation

sendMessageToConversation

getConversations

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This function can be used to fetch a list of conversation (`msdyn_ocliveworkitem`) records for an agent.

Syntax

```
Microsoft.Omnichannel.getConversations(input, correlationId);
```

Parameters

Parameter	Type	Description
input	String	JSON input. It has the following format: {`attributes, agentID, status, orderBy, createdBeforeDays`} where: • `attributes` is an array of strings containing entity attribute names • `agentId` is a string containing unique identifier for the agent • `status` is an array of strings with comma-separated values • `orderBy` is an array of objects in the format: [{ `attributeName`: "<Attribute_Name>" `descending`:<Boolean>}] • `createdBeforeDays` is the number of days since the conversation was created The `agentId` is the only required input variable and the rest are optional.
correlationId	String	Optional. Unique identifier for telemetry logging.

Return value

Returns a resolved or rejected promise based on the outcome of the operation.

> **Note**
>
> Even if the caller doesn't pass any attributes in the input, the function returns the records with the following default attributes:
>
> - msdyn_ocliveworkitemid
> - msdyn_liveworkstreamid
> - msdyn_lastsessionid
> - StatusCode
> - CreatedOn

Example

The following code snippet fetches the currently waiting conversation for the given agent ID.

JavaScript

```
var input = {
    "attributes": [
        "msdyn_title",
        "msdyn_channel"
        ],
    "agentId": "2b330c52-6844-4d36-8e05-03c78c9681dc",
    "status": [3],
    "orderBy": [
        {
            "attributeName": "createdon",
            "descending": true
        }
    ]
};
Microsoft.Omnichannel.getConversations(input).then(result => {
    console.log("result is as:", result);
    }, (error) => {
        console.log("error is as:", error);
    }
);
```

See also

Live chat SDK reference
Omnichannel JavaScript API reference
getConversationId

linkToConversation
unlinkFromConversation
openConversation
sendMessageToConversation

openConversation

Article • 06/06/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This function can be used to open a conversation as a session programmatically.

Syntax

```
Microsoft.Omnichannel.openConversation(conversationId, lastsessionId, liveworkstreamId);
```

Parameters

Parameter	Type	Description
conversationId	String	Unique identifier for the conversation to open. Also reffered to as liveworkitemId.
lastsessionId	String	Optional. Unique identifier for the last session ID in which conversation was opened.
liveworkstreamId	String	Optional. Unique identifier for the live workstream to which the conversation belongs.

Return value

Returns a resolved or rejected promise based on the outcome of the operation.

Example

The following code snippet opens a specified conversation for a given last session ID and live workstream ID.

JavaScript

```
Microsoft.Omnichannel.openConversation("051a340d-c821-42be-8c43-
dfb42c4da821", "63e6b672-c1cc-4ba9-86d5-aea818e73092", "9e20ced1-7c81-eb11-
a812-000d3a9c25eb").then(result => {
  console.log(result);
}, error => {
    console.log(error);
});
```

See also

Live chat SDK reference Omnichannel JavaScript API reference getConversationId
linkToConversation
unlinkFromConversation
getConversations
sendMessageToConversation

linkToConversation

Article • 06/06/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This function can be used to link account, contact, or incident records to the conversation in the focused session. The function will only link the records in the database. The link is reflected after the page is refreshed. The caller is responsible for the UI refresh. Only one account or contact, and one case can be linked to a conversation at a time. If a new customer or case record is linked, it will override the previous record link for the conversation.

> **Note**
>
> Omnichannel for Customer Service supports linking only to active conversations.

Syntax

```
Microsoft.Omnichannel.linkToConversation(entityLogicalName, recordId, conversationId);
```

Parameters

Parameter	Type	Description
entityLogicalName	String	Logical name of the entity (such as account, contact, or incident)
recordId	String	Unique identifier for the entity record to be linked
`*`conversationId	String	Unique identifier for the conversation to link. Also reffered to as liveworkitemId. Without providing this parameter, the entity will link to the focused conversation by default.

`*` Indicates optional parameter.

Return value

Returns a resolved or rejected promise based on the outcome of the operation.

Example

JavaScript

```
//Linking an incident record with the current conversation
Microsoft.Omnichannel.linkToConversation("incident", "6b726d86-d37c-43b8-b3a4-c4056ddd2e07", "b7397aae-ecf8-43a6-aeb0-07d294efb494").then((response) => {
    // Refreshing the tab UI
    Microsoft.Apm.refreshTab("tab-id-3");
}, (error) => {
    console.log(error);
});
```

See also

Live chat SDK reference
Omnichannel JavaScript API reference
getConversations
getConversationId
unlinkFromConversation
openConversation
sendMessageToConversation

unlinkFromConversation

Article • 06/06/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

This function can be used to unlink an already linked entity record of type customer (account or contact) or case from a conversation.

Syntax

```
Microsoft.Omnichannel.unlinkFromConversation(entityLogicalName, recordId, conversationId);
```

Parameters

Parameter	Type	Description
entityLogicalName	String	Logical name of the entity (such as account, contact, or incident)
recordId	String	Unique identifier for the entity record to be unlinked
`*`conversationId	String	Unique identifier for the conversation to unlink. Also reffered to as liveworkitemId. Without providing this parameter, the entity will unlink from the focused conversation by default.

`*` Indicates optional parameter.

Return value

Returns a resolved or rejected promise based on the outcome of the operation.

Example

JavaScript

```
//Unlinking an already linked incident record from the current conversation
Microsoft.Omnichannel.unlinkFromConversation("incident", "6b726d86-d37c-
43b8-b3a4-c4056ddd2e07", "b7397aae-ecf8-43a6-aeb0-
07d294efb494").then((response) => {
    // Refreshing the tab UI
    Microsoft.Apm.refreshTab("tab-id-3");
}, (error) => {
    console.log(error);
});
```

See also

Live chat SDK reference
Omnichannel JavaScript API reference
getConversations
getConversationId
linkToConversation
openConversation
sendMessageToConversation

sendMessageToConversation

Article • 06/06/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Use this method to send messages to a conversation.

> **Note**
>
> - The conversation must be assigned to the agent that's logged in.
> - Only string literals and valid rich object JSON are currently supported. More information: **Retrieve and format rich messages**

Syntax

```
Microsoft.Omnichannel.sendMessageToConversation(message, toSendBox, conversationId);
```

Parameters

Parameter	Type	Description
message	String or MessageObject	Indicates the message to be sent to a conversation.
*toSendBox	Boolean	Determines if the message is sent to sendBox or directly to the conversation. Without providing this parameter, the message will be sent to sendbox by default.
*conversationId	String	Unique identifier of the conversation to which the message is to be sent. Also reffered to as liveworkitemId. Without providing this parameter, the message will send to the focused conversation by default.

`*` Indicates optional parameter.

Return value

Returns a resolved or rejected promise based on the outcome of the operation.

Example

JavaScript

```
// Sending message directly to the chat of conversation with provided
conversationId
Microsoft.Omnichannel.sendMessageToConversation("Test message",  false,
"00000000-0000-0000-0000-000000000000");
```

JavaScript

```
// Sending valid rich object to conversation
let validRichObjJSON = {
  "survey": {
    "Answers": {
      "Section": [
        {
          "Listitems": [
            {
              "OptionTitle": "Xbox Controller multi color",
              "OptionDescription": "Xbox Controller multi color",
              "OptionImageURL": "https://img-prod-cms-rt-microsoft-
com.akamaized.net/cms/api/am/imageFileData/RWwBPt?
ver=d74f&w=270&h=222&q=90&m=6&p=48&b=%23FFFFFFFF&f=png&o=f&aim=true"
            }
          ],
          "SectionTitle": "XBox Controllers",
          "Multiselect": true
        }
      ],
      "Title": "Microsoft Xbox Controllers",
      "subtitle": "Choose a controller you like",
      "ImageURL": "https://img-prod-cms-rt-microsoft-
com.akamaized.net/cms/api/am/imageFileData/RE2XP73?
ver=7371&w=270&h=222&q=90&m=6&p=48&b=%23FFFFFFFF&f=png&o=f&aim=true",
      "ResponseMessage": "Thanks for choosing."
    }
  },
  "richObjectId": "00000000-0000-0000-0000-000000000000",
  "richObjectType": 192350002,
  "richObjectName": "Test with 0 guid",
  "tabKey": ""
}

Microsoft.Omnichannel.sendMessageToConversation(validRichObjJSON,  false);
```

See also

Live chat SDK reference
Omnichannel JavaScript API reference
openConversation
getConversationId
linkToConversation
unlinkFromConversation
getConversations

runMacro

Article • 03/17/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Allows you to execute a macro that was created using Macro Designer.

Syntax

```
Microsoft.ProductivityMacros.runMacro(macroName);
```

Parameters

Parameter	Type	Required	Description
macroName	String	Yes	Name of the macro that is to be executed.

Return value

Returns a promise string which is either resolved with a success message or rejected with an error message, based on execution result.

Example

JavaScript

```
Microsoft.ProductivityMacros.runMacro(macroName).then(function(success){
                console.log(success)
                },
                function(error){
                console.log(error)
});
```

See also

Overview of Productivity Tools
Automate tasks with macros

msdyn_ApplyRoutingRuleEntityRecord Action Reference

Article • 03/17/2023

Applies the active routing rule to an entity.

Owning Solution: Microsoft.Dynamics.CRM.System

Parameters

Parameters allow for data to be passed to the action.

Name	Type	Nullable	Unicode	Description
Target	Microsoft.Dynamics.CRM.crmbaseentity	False	True	The entity to apply the routing rule to.

Return value

This action has no return value.

Entities

This action will apply to entities which have Routing Rule set to active.

Example

The example given below shows how you can create a Web API request to call `msdyn_ApplyRoutingRuleEntityRecord` action for `Incident` entity.

Request

HTTP

```
POST [Organization URI]/api/data/v9.1/msdyn_ApplyRoutingRuleEntityRecord
Accept: application/json
Content-Type: application/json; charset=utf-8
OData-MaxVersion: 4.0
OData-Version: 4.0

{
```

```
    "Target":"incidents(<incidentid>)"
}
```

Response

```
HTTP
```

```
HTTP 204 No Content
```

See also

Developer guide for Omnichannel for Customer Service

App profile manager JavaScript API Reference

Article • 03/17/2023

The app profile manager JavaScript API Reference includes methods and properties to manage tabs and sessions in Customer Service workspace.

Prerequisite

You must have App Profile user or Productivity tools user security roles to use the app profile manager APIs. More information: Security roles

Session management

The following methods and properties allow you to manage sessions in Customer Service workspace.

Method	Description
getFocusedSession	Returns the session object of the session that is in focus.
getAllSessions	Returns the unique identifier of all sessions.
getSession	Returns the session object for the specified session ID.
createSession	Creates a session based on a session template and returns the unique identifier of the session.
canCreateSession	Returns a Boolean value indicating whether a new session can be created.
close	Closes a session.
focus	Sets the focus on a session.
requestFocus	Shows a notification indicator on a given session if the session is not in focus.

Property	Description
sessionId	The ID of a given session.
isDefault	Boolean value indicating if a session is the Home session.

Property	Description
canClose	Boolean value indicating whether a session can be closed.
title	The text label of a session.

Tab management

The following methods and properties allow you to manage tabs in Customer Service workspace.

Method	Description
getFocusedTab	Returns the tab object of the tab that is in focus.
getAllTabs	Returns the unique identifier of all tabs for a session.
getTab	Returns the tab object of the specified tab ID.
createTab	Creates a tab in a focused session and returns the unique identifier of the tab.
canCreateTab	Returns a Boolean value indicating whether a new tab can be created for a session.
closeTab	Closes the tab object for a tab ID.
focusTab	Sets the focus on the tab object for a tab ID.
refreshTab	Refreshes the tab object for a tab ID.

Property	Description
tabId	The ID of a tab.
canClose	Boolean value indicating whether a tab can be closed.
title	The text label of a tab.

Context management

The following method allows you to manage the session context in Customer Service workspace.

Method	Description

Method	Description
updateContext	Sets the automation dictionary and enables providers to add, modify, and remove values of slugs; the updated values are then available for invoking macros in the future.

See also

App profile manager

getFocusedSession (app profile manager)

Article • 03/17/2023

Returns the session object of the session that is in focus.

Syntax

`Microsoft.Apm.getFocusedSession();`

Return value

Session as an object.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
console.log(session.sessionId);
```

getAllSessions (app profile manager)

Article • 03/17/2023

Returns the unique identifier of all sessions.

Syntax

`Microsoft.Apm.getAllSessions();`

Return value

Collection of session identifiers.

Example

JavaScript

```
const sessionIds = Microsoft.Apm.getAllSessions();
sessionIds.forEach(id=> {
        console.log(id);
});
```

getSession (app profile manager)

Article • 03/17/2023

Returns the session object for a session ID.

Syntax

`Microsoft.Apm.getSession(sessionId);`

Parameters

**Name	Type	Required	Description
sessionID	String	Yes	The session ID

Return value

Session as an object.

Example

JavaScript

```
const sessionId = "session-id-1";
const session = Microsoft.Apm.getSession(sessionId);
if (!session.isDefault) {
    session.title = "new title";
}
```

createSession (app profile manager)

Article • 03/17/2023

Creates a session based on a session template and returns the unique identifier of the session.

Syntax

`Microsoft.Apm.createSession(SessionInput);`

Parameters

Name	Type	Required	Description
SessionInput	String	Yes	JSON input properties of the session to be created.

The structure of the JSON `SessionInput` parameter is as follows:

JSON

```
{
        /**
         * Returns the name of the template used in the session
         */
        templateName: string;
        /**
         * additional information for session creation
         */
        sessionContext: Map<string, string>;
        /**
         * will focus after session is created
         */
        isFocused?: boolean;
    }
```

Return value

Session identifier as String.

Examples

These examples use the `createSession` method to create a new session passing an entity record identifier and a session template as parameters.

Create a basic session

Creates a new session passing the incident as entity name, incident Id as entityId, and unique name of the session template as templateName.

> **Note**
>
> The user invoking these methods must be assigned to an app profile that contains the session template.

JavaScript

```
x=new Map();
x.set("parametersStr", '[["entityName", "incident"], ["entityId", "fac04293-1ab0-eb11-8236-000d3a5c49ed"]]');
Microsoft.Apm.createSession({templateName: "case_entity_session_default_template", sessionContext: x});
```

Create a session that is not in focus

JavaScript

```
x=new Map();
x.set("parametersStr", '[["entityName", "incident"], ["entityId", "0e0e6c4f-cbb6-eb11-8236-000d3a5ab8b9"]]');
Microsoft.Apm.createSession({templateName: "case_entity_session_default_template", sessionContext: x, isFocused: false});
```

canCreateSession (app profile manager)

Article • 03/17/2023

Allows you to check whether a new session can be created.

> **Note**
>
> Customer Service workspace lets you open up to 10 sessions simultaneously. If you open more than 10 sessions, then the following message is displayed: "Maximum sessions reached. Close a session before opening another."

Syntax

`Microsoft.Apm.canCreateSession();`

Return value

A Boolean value of true if a new session can be created; otherwise, false.

Example

JavaScript

```
if  (Microsoft.Apm.canCreateSession()) {
//checks if maximum allowed of sessions has been reached
x=new Map();
x.set("parametersStr", '[["entityName", "incident"], ["entityId", "fac04293-1ab0-eb11-8236-000d3a5c49ed"]]');
Microsoft.Apm.createSession({templateName: "case_entity_session_default_template", sessionContext: x});
}
```

close (app profile manager)

Article • 03/17/2023

Closes a session.

> **Note**
>
> The Home session cannot be closed.

Syntax

`Microsoft.Apm.getFocusedSession().close();`

`Microsoft.Apm.getSession(sessionId).close();`

Return value

None.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
if (session.canClose) {
    session.close();
}
```

focus (app profile manager)

Article • 03/17/2023

Sets the focus on a session.

Syntax

```
Microsoft.Apm.getSession(sessionId).focus();
```

Return value

None.

Example

JavaScript

```
Microsoft.Apm.getSession("session-id-4").focus();
```

requestFocus (app profile manager)

Article • 03/17/2023

Shows a notification indicator on a session if the session is not in focus.

Syntax

```
Microsoft.Apm.getSession(sessionId).requestFocus();
```

Return value

None.

Example

JavaScript

```
Microsoft.Apm.getSession("session-id-4").requestFocus();
```

sessionId (app profile manager)

Article • 03/17/2023

The ID of a session.

Syntax

```
Microsoft.Apm.getSession(sessionId).focus();
```

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
console.log(session.sessionId);
```

isDefault (app profile manager)

Article • 03/17/2023

Boolean value indicating whether a session is the Home session.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
console.log(session.isDefault);
```

canClose (app profile manager session)

Article • 03/17/2023

Boolean value indicating whether a session can be closed.

> **Note**
>
> If the canClose property is set to false, then the button to close a session from the session panel is hidden. Otherwise, the close button is visible when hovering over the session on the session panel.

Return value

None.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
session.canClose = false;
```

title (app profile manager session)

Article • 03/17/2023

The text label of a session.

> **Note**
>
> The title of the Home session cannot be changed.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
session.title = "Testing";
```

getFocusedTab (app profile manager)

Article • 03/17/2023

Returns the tab object of the tab that is in focus.

Syntax

`Microsoft.Apm.getFocusedSession().getFocusedTab();`

Return value

The tab object.

Example

JavaScript

```
const tab = Microsoft.Apm.getFocusedSession().getFocusedTab();
tab.refresh();
```

getAllTabs (app profile manager)

Article • 03/17/2023

Returns the unique identifiers of all tabs for a specified session.

Syntax

```
Microsoft.Apm.getFocusedSession().getAllTabs();
```

Return value

Collection of tab identifiers.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
session.getAllTabs().forEach(id => {
    const tab = session.getTab(id);
    console.log(tab.title);
});
```

getTab (app profile manager)

Article • 03/17/2023

Returns the tab object for a tab identifier.

Syntax

```
Microsoft.Apm.getFocusedSession().getTab();
```

Return value

Collection of tab identifiers.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
session.getTab("tab-id-1").refresh();
```

createTab (app profile manager)

Article • 10/09/2023

Creates an app tab in a focused session and returns the unique identifier of the tab.

Syntax

`Microsoft.Apm.createTab(AppTabInput);`

Parameters

Name	Type	Required	Description
AppTabInput	String	Yes	JSON input properties of the tab to be created.

The structure of the JSON `AppTabInput` parameter is as follows:

JSON

```
{
    //Unique Name of the Application Tab Template
    // type = string
    templateName: <unique name of the application tab template>;
    //additional context for tab creation and tab slugs
    // type  Map<string, string>
    appContext?:  Map<string, string>;
    //should this tab be focused after creation
    // type=boolean
    isFocused?: <true or false>;
}
```

Return value

Tab identifier as String.

Examples

These examples use the `createTab` method to launch a new tab.

Create a basic tab

Creates a new tab in the focused session, passing the entity name, recordId, and app tab template name as parameters.

JavaScript

```
var tabInput = {templateName: "msdyn_entityrecord",  appContext: new
Map().set("entityName", "account").set("entityId", "09e68a6e-b7ef-eb11-bacb-
000d3a373d11"),  isFocused: true};
Microsoft.Apm.createTab(tabInput);
```

Create a tab passing values to an entity form

Creates a new tab in the focused session passing the entity name and app tab template name as parameters. It also populates the target entity form with additional values.

JavaScript

```
var formParams = {};
formParams["subject"] = "Collaboration task";
formParams["actualdurationminutes"] = 60;
formParams["prioritycode"] = 2;
formParams["scheduledend"] = "12/12/2030 10:00"
formParams["regardingobjectid"] = "a333a119-d573-ec11-8942-000d3a840a75";
formParams["regardingobjectidname"] = "How do I measure my tamp pressure?";
formParams["regardingobjectidtype"] = "incident";

var tabInput = {
templateName: "msdyn_entityrecord",
appContext: new Map().set("entityName", "task").set("formId", "d5b4a1b2-
de4f-4f86-8768-b0730001e7d1").set("data", JSON.stringify(formParams)),
isFocused: true
};
Microsoft.Apm.createTab(tabInput);
```

Create a tab with a web resource

Creates a new tab in the focused session passing a web resource as parameter for app tab template.

JavaScript

```
var tabInput = {templateName: "msdyn_omnichannel_kbsearch", isFocused:
true};
Microsoft.Apm.createTab(tabInput);
```

Create a tab with a web resource passing web resource parameter

Creates a new tab in the focused session passing a tab template and web resource parameter as app tab template parameters.

```
var tabInput = {
    templateName:"msdyn_omnichannel_kbsearch",
    appContext: new Map().set("data", "Contoso"),
    isFocused: true};
Microsoft.Apm.createTab(tabInput);
```

Create a tab with a web resource passing web resource name and web resource parameter

Creates a new tab in the focused session passing a tab template, web resource name, and web resource parameter as app tab template parameters.

```
var tabInput = {
    templateName:" new_tabtemplate_customwebresource",
     appContext: new Map().set("data", " Contoso
").set("webresourceName","msdyn_kbsearchpagehost.html"),
    isFocused: true};
Microsoft.Apm.createTab(tabInput);
```

Create a tab with Power Apps component framework control page

Creates a new tab in the focused session passing a framework control as a parameter for the app tab template. The control is passed from the API call.

JavaScript

```
var controlDataParams = {};
controlDataParams["<parameter>"] = "<Value>";

x = new Map();
x.set("<custom_session_context_params_key>", "<Value>");
x.set("parametersStr", '[["controlName", "<Control_Name>"],
```

```
["data",'+JSON.stringify(controlDataParams)+']]');

Microsoft.Apm.createSession(
    {
        templateName: "<template_name>",
        sessionContext: x
    });
```

You can also pass the following parameters:

JavaScript

```
var controlDataParams = {};
controlDataParams["<parameter>"] = "<Value>";

x = new Map();
x.set("<custom_session_context_params_key>",
JSON.stringify(controlDataParams));
x.set("<additional_custom_session_params>", "<Value>");

Microsoft.Apm.createSession(
    {
        templateName: "<template_name>",
        sessionContext: x
    });
```

canCreateTab (app profile manager)

Article • 03/17/2023

Allows you to check whether a new tab can be created in a session.

> **Note**
>
> Customer Service workspace lets you open up to 10 tabs simultaneously, in a session. If you open more than 10 tabs, then the following message is displayed: "Maximum tabs reached. Close a tab in this session before opening another."

Syntax

```
Microsoft.Apm.getFocusedSession().canCreateTab();
```

Return value

A Boolean value of true if a new tab can be created; otherwise, false.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
console.log(session.canCreateTab());
```

closeTab (app profile manager)

Article • 03/17/2023

Closes the specified app tab in the current session.

> **Note**
>
> The anchor tab of a session (the first tab) cannot be closed.

Syntax

```
Microsoft.Apm.closeTab(tabId);
```

Parameters

Name	Type	Required	Description
tabId	String	Yes	Unique identifier of the tab to be closed.

Return value

None.

Examples

Closing a tab using Microsoft.Apm.closeTab

JavaScript

```
const tab = Microsoft.Apm.getFocusedSession().getFocusedTab();
if (tab.canClose) {
    Microsoft.Apm.closeTab(tab.tabId);
}
```

Closing a tab using Microsoft.Apm.getFocusedSession().getFocusedTab().close()

JavaScript

```
const tab = Microsoft.Apm.getFocusedSession().getFocusedTab();
if (tab.canClose) {
    tab.close();
}
```

focusTab (app profile manager)

Article • 03/17/2023

Sets the focus on a specified tab in the current session.

Syntax

```
Microsoft.Apm.focusTab(tabId);
```

Parameters

Name	Type	Required	Description
tabId	String	Yes	Unique identifier of the tab to be focused.

Return value

None.

Examples

The following examples use the `focusTab` method to set the focus on a specified tab.

Set a tab in focus using Microsoft.Apm.focusTab(tabId)

JavaScript

```
Microsoft.Apm.focusTab("tab-id-5);
```

Set a tab in focus using Microsoft.Apm.getFocusedSession().getTab().focus()

JavaScript

```
Microsoft.Apm.getFocusedSession().getTab("tab-id-5").focus();
```

refreshTab (app profile manager)

Article • 03/17/2023

Refreshes the app tab in the current session.

Syntax

```
Microsoft.Apm.refreshTab(tabId);
```

Parameters

Name	Type	Required	Description
tabId	String	Yes	Unique identifier of the tab that has to be refreshed.

Return value

None.

Examples

The following examples use the `refreshTab` method to refresh a specified tab.

Refresh a tab using `refreshTab` method

JavaScript

```
Microsoft.Apm.refreshTab("tab-id-2")
```

Refresh a tab using `refresh` method

JavaScript

```
Microsoft.Apm.getFocusedSession().getFocusedTab().refresh();
```

tabID (app profile manager)

Article • 04/07/2023

The identifier of a tab.

Example

JavaScript

```
const session = Microsoft.Apm.getFocusedSession();
const tabId = session.getFocusedTab().tabId;
console.log(tabId);
```

canClose (app profile manager tab)

Article • 03/17/2023

A Boolean value indicating whether a tab can be closed.

> **Note**
>
> If the canClose property is set to false, then the button to close the tab is hidden. Otherwise, the close button is visible.

Return value

None.

Example

JavaScript

```
const tab = Microsoft.Apm.getFocusedSession().getFocusedTab();
if (tab.canClose) {
    tab.close();
}
```

title (app profile manager tab)

Article • 04/07/2023

The text label of a tab.

Example

JavaScript

```
const tab= Microsoft.Apm.getFocusedSession().getFocusedTab();
tab.title = "New Tab Title";
```

updateContext (app profile manager)

Article • 03/17/2023

Allows you to set the automation dictionary and enables providers to add, modify, and remove values of slugs; the updated values are then available for invoking macros in the future.

Syntax

```
Microsoft.Apm.getFocusedSession().updateContext(input);
```

Parameters

Name	Type	Required	Description
input	String	Yes	JSON input properties of the session context to be updated.

Return value

None.

Example

JavaScript

```
Microsoft.Apm.getFocusedSession().updateContext({"customerName":"Contoso"});
```

Responsible AI FAQ for Dynamics 365 Customer Service

Article • 08/04/2023

An AI system includes not only the technology, but also the people who use it, the people affected by it, and the environment in which it's deployed. Microsoft's Responsible AI FAQs are intended to help you understand how AI technology works, the choices system owners and users can make that influence system performance and behavior, and the importance of thinking about the whole system, including the technology, the people, and the environment. You can use Responsible AI FAQs to better understand specific AI systems and features that Microsoft develops.

Responsible AI FAQs are part of a broader effort to put Microsoft's AI principles into practice. To find out more, see Microsoft AI principles.

AI-driven features in this app

This app contains a growing list of AI-driven features. To learn about the capabilities and impact of specific features, select a feature name from the list.

- FAQ for Copilot in Customer Service

FAQ for Copilot in Customer Service

Article • 08/04/2023

This FAQ article helps answer the questions around the responsible use of AI in copilot features in Customer Service.

What is Copilot in Dynamics 365 Customer Service?

Copilot is an AI-powered tool that transforms the agent experience in Dynamics 365 Customer Service. It provides real-time AI powered assistance that will help agents resolve issues faster, handle cases more efficiently, and automate time-consuming tasks. Then agents can focus on delivering high-quality service to their customers.

What are the systems capabilities?

Copilot provides the following main features:

- **Ask a question**: Is the first tab that agents see when they activate the Copilot help pane. It's a conversational interface with Copilot, which helps provide contextual responses to the agents' questions. Copilot's responses are based on both internal and external knowledge sources provided by your organization during setup.
- **Write an email**: Is the second tab on the Copilot help pane helps agents quickly create email responses based on the context of the case, reducing the time users need to spend creating emails.
- **Draft a chat response**: Enables agents to create a response in a single click to the ongoing digital messaging conversation from knowledge sources configured by your organization.
- **Summarize a case**: Copilot provides agents with a summary of a case right on the case form, so they can quickly catch up on the important details of a case.
- **Summarize a conversation**: Copilot provides agents with a summary of a conversation at key points throughout the customer journey such as virtual agent handoffs, transfers and on demand.

What is the system's intended use?

Copilot in Customer Service is intended to help customer service representatives work more efficiently and effectively. Customer service representatives can use Copilot's knowledge-based responses to save time from searching knowledge articles and drafting responses. Copilot summaries are designed to support agents in quickly ramping up on cases and conversations. Content generated by Copilot in Customer Service isn't intended to be used without human review or supervision.

How was Copilot in Customer Service evaluated? What metrics are used to measure performance?

Copilot in Customer Service has been evaluated against real world scenarios with customers around the world through each phase of its design, development, and release. Using a combination of research and business impact studies, we've evaluated various quantitative and qualitative metrics about Copilot, including its accuracy, usefulness, and agent-trust.

What are the limitations of Copilot in Customer Service? How can users minimize the impact of Copilot limitations?

Copilot's knowledge-based capabilities like ask a question, write an email, and draft a chat response, are dependent on high-quality and up-to-date knowledge articles for grounding. Without these knowledge articles, users are more likely to encounter Copilot responses that aren't factual.

To minimize the likelihood of seeing non-factual responses from Copilot, it's important that the organizations employ robust knowledge management practices to ensure the business knowledge that connects to Copilot is of high-quality and up-to-date.

What operational factors and settings allow for effective and responsible use of the system?

Always review results from Copilot

Copilot is built on large language model technology, which is probabilistic in nature. When presented with a piece of input text, the model calculates the probability of each

word in that text given the words that came before it. The model then chooses the word that is most likely to follow. However, since the model is based on probabilities, it can't say with absolute certainty what the correct next word is. Instead, it gives us its best guess based on the probability distribution it has learned from the data it was trained on. Copilot uses an approach called grounding, which involves adding additional information to the input to contextualize the output to your organization. It uses semantic search to understand the input and retrieve relevant internal organizational documents and trusted public web search results, and guides the language model to respond based on that content. While this is helpful in ensuring Copilot responses adhere to organizational data, it's important to always review results produced by Copilot prior to using them.

Get the best out of Copilot

When you're interacting with Copilot, it's important to keep in mind that the structure of the questions can greatly affect the response that Copilot gives. To interact with Copilot effectively, it's crucial to ask clear and specific questions, provide context to help the AI better understand your intent, ask one question at a time, and avoid technical terms for clarity and accessibility.

Ask clear and specific questions

Clear intent is essential when asking questions, as it directly impacts the quality of the response. For instance, asking a broad question like “Why is the customer’s coffee machine not starting up?” is less likely to yield a useful response compared to a more specific question, such as “What steps can I take to determine why the customer’s coffee machine isn't starting up?”.

However, asking an even more detailed question like “What steps can I take to determine why a Contoso 900 coffee machine with a 5-bar pressure rating isn't starting up?” narrows down the scope of the problem and provides more context, leading to more accurate and targeted responses.

Add Context

Adding context helps the conversational AI system better understand the user's intent and provide more accurate and relevant responses. Without context, the system might misunderstand the user's question or provide generic or irrelevant responses.

For example, "Why is the coffee machine not starting up?" will result in a generic response when compared to a question with more context like, "Recently, the customer

initiated descaling mode on their coffee machine and completed descaling successfully. They even received three flashes from the power light at the end to confirm that descaling was complete. Why are they unable to start the coffee machine anymore?"

Adding context in this manner is important because it helps Copilot better understand the user's intent and provide more accurate and relevant responses.

Avoid technical terms if possible

We recommend that you avoid using extremely technical terms and resource names when interacting with Copilot because the system may not always understand it accurately or appropriately. The use of simpler, natural language helps ensure that the system can understand the user's intent correctly and provide clear, useful responses. For example –

"The customer can't SSH into the VM after having changed the firewall config."

Instead, you can rephrase as –

“The customer changed the firewall rules on their virtual machine. However, they can no longer connect using Secure Shell (SSH). Can you help?”

By following the suggestions, agents can enhance their interactions with Copilot and increase the likelihood of receiving accurate and confident responses from it.

Summarizing or expanding a response

Sometimes the response from Copilot can be longer than expected. This could be the case when the agent is in a live chat conversation with a customer and needs to send concise responses when compared with sending a response over email. In such cases, asking Copilot to “summarize the response” will result in a concise answer to the question. Similarly, if there's a need for more detail, asking Copilot to “Provide more details” will result in a more detailed answer to your question. If the response is truncated, typing “continue” will display the remaining part of the response.

In which Customer Service apps is Copilot available?

Copilot is available in Customer Service workspace, Customer Service Hub, Omnichannel for Customer Service, and custom apps.

How can I influence the responses generated by copilot? Can I fine tune the underlying LLM?

It's not possible to customize the large language model (LLM) directly. Copilot responses can be influenced by updating the source documentation. All the feedback content from Copilot responses is stored. Reports can be created using this data to determine the data sources that need to be updated. It’s a good idea to have processes in place to periodically review the feedback data and ensure knowledge articles are providing the best and most up-to-date information to Copilot.

What's the data security model for Copilot?

Copilot enforces the role-based access (RBAC) controls defined and adheres to all the existing security constructs. Therefore, agents cannot view data that they do not have access to. Additionally, only data sources that the agent has access to are used for copilot response generation.

Can Copilot read tables and images in my knowledge articles?

At this time, Copilot cannot read tables and images in knowledge articles.

Where does data processing and retrieval occur to generate copilot responses?

Copilot is not calling the public OpenAI service that powers ChatGPT. Copilot in Customer Service uses the Microsoft Azure OpenAI Service in a Microsoft managed tenant. All data processing and retrieval occurs within Microsoft managed tenants. Additionally, customer’s data is not shared and is not fed back into public models.

See also

Use copilot features
Region availability of Copilot

Check your contact center health

Article • 10/25/2023

As administrators, you can use the integrated health checker to identify any errors, warnings, and then recommended best practices in your configuration. You'll receive proactive notifications of emerging issues with health checks running in the background. This proactive approach can help ensure that your call center flows and configurations operate at optimal levels.

Prerequisites

You must have the System Administrator role.

Run a check

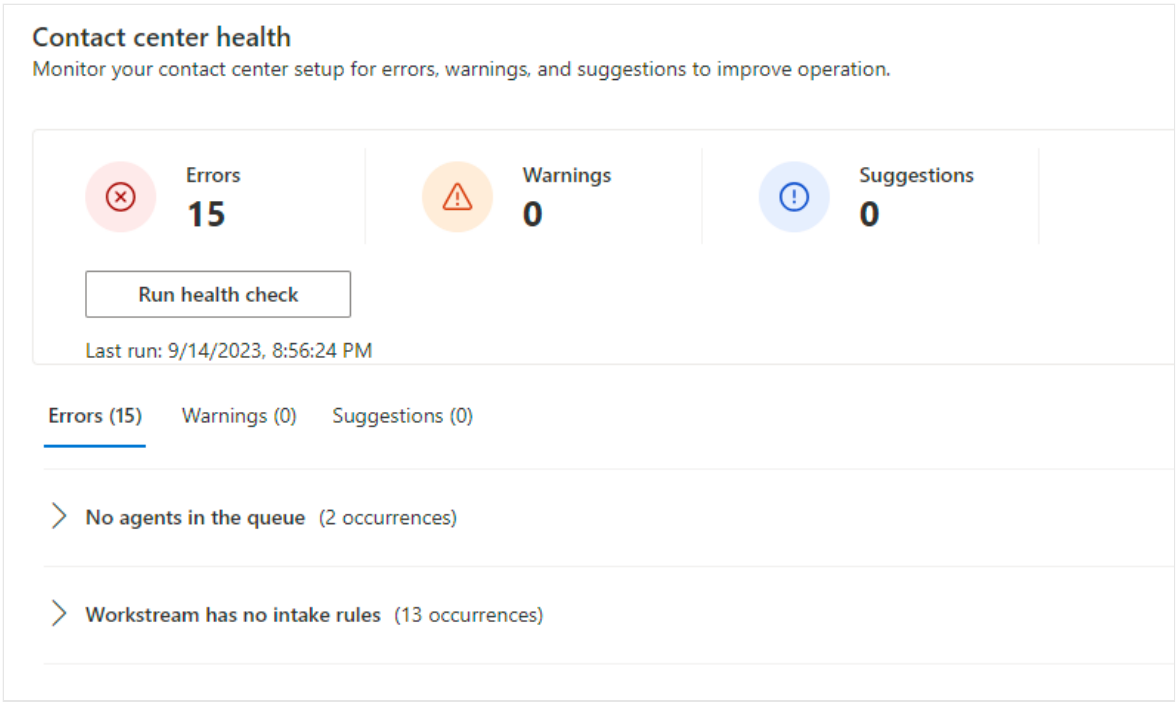
Do the following steps to check for configuration errors and incomplete configurations in your Customer Service environment.

1. Sign into Customer Service admin center. The **Home** page displays the **Contact center health** section.

2. Select **Run health** check. Depending on the size of your contact center and the various features that you have configured, the check takes a couple of minutes to run and display the results.

   After the check is complete, the page displays the results in three categories with the number of occurrences as follows:

   - Errors
   - Warnings
   - Suggestions



3. Expand a category to see the problems and then select the link to a problematic setting. The setting opens on a new tab for you to take action on it.

4. Optionally, after you resolve all the issues in the configuration, run the health check again until you see zero occurrences of errors and warnings.

Health check rules

Some of the rules used in the health check and their descriptions are as follows.

Category	Problem: Description	Recommendation displayed by the health checker
Error	Automatic record creation or update didn't work: To review issues with automatic record creation and update rules, visit the activity monitor dashboard.	Link to the activity monitor.
Error	SLA compliance risks and failures aren't being monitored: Agents aren't being informed about SLA compliance failures or risks. To resume compliance monitoring, restart the SLAInstanceMonitoringWarningAndExpiryFlow cloud flow solution within Power Automate.	Link to Power Automate flow.
Error	Default queue is inactive: Routing rules using this queue won't work. Activate the queue or change the default to an active queue	Link to the inactive queue page to activate the default queue.
Error	No agents in the queue: A queue without agents can't be used for routing. Remove the empty queue from routing	Link to queue page to add agents or

Category	Problem: Description	Recommendation displayed by the health checker
	definitions, or add agents to the queue.	supervisors.
Error	Workstream has no intake rules: Without an intake rule, a workstream's routing definitions won't work. Define an intake rule for the workstream.	Link to workstream page to create intake rules.
Error	No valid assignment definition for the queue: Without an assignment method, agents in the queue can’t be assigned work items. Select an assignment method. If it’s a custom method, ensure that it contains rules.	Link to queue page to add custom assignment rule.
Warning	Unsupported automatic record creation rules in use: Automatic record creation rules defined in the web client aren't supported. Use the migration tool to update the rules in the Unified Interface experience, and activate the new rule version.	Link to migration tool for automatic record creation.
Warning	Unsupported service level agreement rules in use: Service level agreement rules defined in the web client aren't supported. Use the migration tool to update the rules in the Unified Interface experience, and delete the old rule version.	Link to the migration tool for service level agreements.

See also

Create queues in unified routing
Create records automatically
Use Customer Service admin center

Incoming email isn't converted to a case

Article • 06/13/2023

This article provides a resolution for the issue where an incoming email isn't converted to a case in Dynamics 365 Customer Service. Also, to diagnose and fix the issues, you can use the **Activity monitor** available on the **Record creation and update rules** page, and configure the options to view skipped scenarios, failed scenarios, or all scenarios for a time period. For more information, see Manage activity monitor to review and track rules.

Symptoms

Email-to-case conversion isn't working in Dynamics 365 Customer Service.

Cause 1: The email isn't syncing with the system

Resolution

To check whether the email is syncing with the system, navigate to **Activities** and look for the email activity. If email isn't syncing with the system, there may be an issue with the email router or server-side sync configuration.

Cause 2: Email activity is created but related QueueItem isn't found

Resolution

You need to check whether the email activity is created but a related QueueItem isn't found. If an active **Automatic Record Creation and Update Rule** exists for a specific queue, the QueueItem is marked as inactive and disappears from the QueueItem view.

Cause 3: The email is coming from an unknown sender

Resolution

If the email is coming from an unknown sender, check for the **Create contact for unknown sender** option. Go to the **Automatic Record Creation and Update Rule** configuration and check whether the **Create contact for unknown sender** box is selected. If the **Create contact for unknown sender** check box isn't selected, an incoming email from an unknown sender won't be converted to a case.

Cause 4: Automatic Record Creation and Update Rule configuration issues

Resolution

You need to check whether the **Automatic Record Creation and Update Rule** feature is configured properly by going to system jobs and checking for a failure message. For more information about configuration failure scenarios and resolution for sample configuration failure, see Troubleshoot common email error messages.

> **Note**
>
> The **Customer** field in the case entity can be a contact or an account. If a matching incoming email address isn't found for a contact or an account, and the **Create contact for unknown sender** check box is selected, the system creates a contact for the incoming email address and links it to the case's **Customer** field.

Cause 5: The contact and account have different email addresses

Resolution

You need to check whether the contact and account have the same incoming email address. A case that's created from an incoming email will resolve the **Customer** field on the case as **Account**.

Cause 6: The email is sent using only the Bcc field

Resolution

To fix this issue, ensure the queue email address is in the **To** or **Cc** fields of incoming emails. Emails sent with the queue address in the **Bcc** field won't be processed.

Cause 7: The email is a reply to the tracked email

Resolution

If the incoming email is in response to an already tracked email associated with a case, no new case will be created. If the **InReplyTo** value matches the **MessageId** of an email that's already in Dynamics 365, server-side synchronization correlates the new email with the existing one, and the "Automatic record creation and Update" rule skips case creation for the new email. For more information, see Specify which emails are automatically tracked.

Cause 8: Contact creation failed when the incoming email is from an unknown sender

Resolution

By default, a contact for an unknown email sender is created with the email owner context. A case might not get created if the email owner doesn't have the required permissions. Alternatively, you may choose to use the rule owner permissions to create the new contact by configuring the `msdyn_ArcCreateContactWithRuleOwner` environment variable. For more information, see Create contacts for unknown senders using rule owner context.

Cause 9: No active "Automatic record creation and Update" rule exists for the queue to which the email was sent

Resolution

Navigate to the "Automatic record creation and Update" rules and ensure that an active "Automatic record creation and Update" rule exists for the queue to which the email was sent. If no "Automatic record creation and Update" rule exists for the queue to which

the email was sent, a case won't be created since there won't be any matching rule and condition.

Feedback

Was this page helpful? Yes No

Get help at Microsoft Q&A

Microsoft Dynamics 365 Customer Service troubleshooting

Welcome to Microsoft Dynamics 365 Customer Service troubleshooting. These articles explain how to determine, diagnose, and fix issues that you might encounter when you use Microsoft Dynamics 365 Customer Service. In the navigation pane on the left, browse through the article list or use the search box to find issues and solutions.

Email

HOW-TO GUIDE

Incoming email isn't converted to a case

Troubleshoot configuration issues with automatic record creation and update rules

Insights

HOW-TO GUIDE

Troubleshoot issues using Solution Health Hub

Service Level Agreements (SLAs)

HOW-TO GUIDE

Can't delete SLAs or SLA Items in upgrade or manual deletion

Can't delete managed solution consisting of SLA-enabled entity

Error when updating a case

SLA timer doesn't pause when state is changed to OnHold on a holiday

SLA KPI instance shows status as Canceled

Warning message on SLA KPI instances

Omnichannel for Customer Service

HOW-TO GUIDE

Authentication error in agent dashboard

Agent dashboard loading or authorization issues

Conversation stuck in wrap-up state

Communication panel loading issues

Error creating a chat widget or social channel

Provisioning fails due to expired license

PVA conversations active after chat ends

Documentation and Training

REFERENCE

Customer Service documentation

Customer Service training

Customer Service Community

Can't delete a managed solution consisting of an SLA-enabled entity

Article • 05/25/2023

This article provides a resolution for the issue where you can't delete a managed solution consisting of a service-level agreement (SLA) enabled entity in Dynamics 365 Customer Service.

Symptoms

You can't delete a managed solution that contains an entity with an SLA enabled on it. This entity has been created as part of a previously imported solution.

Cause

Once enabled on an entity, an SLA can't be disabled.

Use this example to understand the issue:

1. Create a new solution in *Org1* and name it *Field solution*.
2. Create a new entity in *Field solution* and name it *Field work*.
3. Export *Field solution* as a managed solution.
4. Import *Field solution* into a new org named *Org2*.

Next:

1. Create another solution in *Org1* and name it *Delta Field solution*.
2. Associate the entity *Field work* with *Delta Field solution*. Enable the SLA on the entity.
3. Export *Delta Field solution* as a managed solution.
4. Import *Delta Field solution* into *Org2*.

Now, if you try to delete *Delta Field solution* from Org2, you can't delete it because it has a *Field work* entity associated with it that has the SLA enabled.

Resolution

To delete a managed solution with an SLA-enabled entity, you need to first delete the previously imported managed solution that created the entity entry. This action ensures

that the entity entry is deleted. Then, you can create the entity again or reimport the managed solution.

To delete *Delta Field solution* in *Org2*, delete *Field solution* first.

Field solution can be deleted because the entity associated with it —*Field work*— doesn't have SLA enabled. Deleting *Field solution* ensures that both the SLA configuration and the entity are deleted.

> **Note**
>
> This workaround won't work for the out-of-the-box (OOB) entities because you can't delete OOB entities or managed solutions that have OOB entities associated with them.

Feedback

Was this page helpful? Yes No

Provide product feedback | Get help at Microsoft Q&A

Microsoft Dynamics 365 Customer Service troubleshooting

Welcome to Microsoft Dynamics 365 Customer Service troubleshooting. These articles explain how to determine, diagnose, and fix issues that you might encounter when you use Microsoft Dynamics 365 Customer Service. In the navigation pane on the left, browse through the article list or use the search box to find issues and solutions.

Email

HOW-TO GUIDE

Incoming email isn't converted to a case

Troubleshoot configuration issues with automatic record creation and update rules

Insights

HOW-TO GUIDE

Troubleshoot issues using Solution Health Hub

Service Level Agreements (SLAs)

HOW-TO GUIDE

Can't delete SLAs or SLA Items in upgrade or manual deletion

Can't delete managed solution consisting of SLA-enabled entity

Error when updating a case

SLA timer doesn't pause when state is changed to OnHold on a holiday

SLA KPI instance shows status as Canceled

Warning message on SLA KPI instances

Omnichannel for Customer Service

HOW-TO GUIDE

Authentication error in agent dashboard

Agent dashboard loading or authorization issues

Conversation stuck in wrap-up state

Communication panel loading issues

Error creating a chat widget or social channel

Provisioning fails due to expired license

PVA conversations active after chat ends

Documentation and Training

REFERENCE

Customer Service documentation

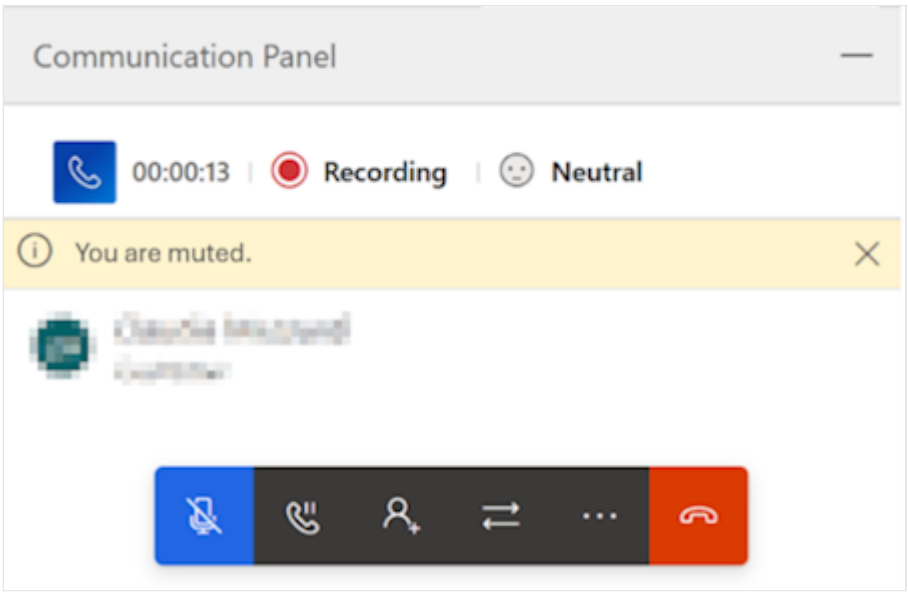
Customer Service training

Customer Service Community

Use diagnostic messages to troubleshoot issues in voice calls

Article • 09/15/2023

When your agents are on a voice call, they might sometimes see warning or error messages on the **Communication Panel**. These messages will help them understand the issues that are affecting their call experience. Agents can use the information in the message to diagnose and resolve the issues themselves. For example, if an agent speaks when the microphone is muted, a "You are muted" message occurs to let them consider unmuting the microphone.



Troubleshoot network issues

The following table lists the warning messages that appear when your agents have network issues in their voice calls. These messages help agents diagnose and resolve the issues. Use the network values to find more information about the cause and mitigation steps described in Azure Communication Services.

Message	Description	Network value
Your network is causing poor call quality. Try switching to a better network, or moving closer to a Wi-Fi access point.	Appears when the network connection is lost and the system tries to reconnect to the network.	`networkReconnect`
Your network is causing poor call quality. Try switching to a better	Appears when the incoming streaming quality is poor.	`networkReceiveQuality`

Message	Description	Network value
network, or moving closer to a Wi-Fi access point.		
Your network is causing poor call quality. Try switching to a better network, or moving closer to a Wi-Fi access point.	Appears when the outgoing streaming quality is poor.	`networkSendQuality`

Troubleshoot device issues

The following table lists the messages that appear when your agents have issues with their audio devices in voice calls. Your agents can use the information to take action and resolve the problem. Use the audio values to find more information about the cause and mitigation steps described in Azure Communication Services.

Message	Description	Audio value
No speakers detected. Try connecting one to receive call audio.	Appears when no audio output device or speaker is detected on the user's system.	`noSpeakerDevicesEnumerated`
You are muted.	Appears when an agent is speaking while it's muted.	`speakingWhileMicrophoneIsMuted`
No microphone detected. Try connecting one so that others can hear you.	Appears when no microphone is detected on the agent's system.	`noMicrophoneDevicesEnumerated`
Your microphone is not working. On the communication panel, select More -> Device settings to connect to a different device or try reconnecting this one.	Appears when the microphone is muted unexpectedly or is not functioning.	`microphoneMuteUnexpectedly` `microphoneNotFunctioning`

See also

- Azure Communication Services user-facing diagnostics
- How to avoid calls from being disconnected

Feedback

Was this page helpful? Yes No

Provide product feedback

Troubleshoot issues in Customer Service and Omnichannel for Customer Service using Solution Health Hub

Article • 05/25/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

Introduction

You can use Solution Health Hub to get a better picture of the state of your Power Platform environment and detect any issues it might have. Solution Health Hub runs rules within an instance to validate the environment's configuration, which might change over time through natural system operations. The rules are specific to Dynamics 365 Customer Service and Omnichannel for Customer Service. You can run the rules on demand when you run into an issue. Some rules are automatically triggered when Dynamics 365 Customer Service or Omnichannel for Customer Service is installed or updated. You can regularly run the rule sets to monitor the health of your environment.

Here are some issues that the Solution Health Hub app helps detect:

- **Customer Service**
  - Critical Customer Service processes that are deactivated.
  - Processes that will cause an upgrade to fail are assigned to disabled users.
  - Presence of customized web resources that might lead to runtime issues.
- **Omnichannel for Customer Service**
  - Missed or wrong configurations.
  - Queues with no agents.
  - Agents with no capacity.
  - Agents who aren't part of any queues.
  - Workstream configuration problems.

Prerequisites

To run the Dynamics 365 Customer Service rules, the following prerequisites must be met:

- The Customer Service Hub app is installed in your environment.
- You should have either the CSR Manager or System Administrator security role.

To run the Omnichannel for Customer Service rules, you must have Omnichannel for Customer Service installed in your environment.

Run a health check

Take the following steps to run an analysis job to check for issues in Omnichannel for Customer Service:

1. Open the Solution Health Hub app.
2. Select **Analysis Jobs** > **New**.
3. In the **Create Analysis Job** dialog box, in **Rule Set**, select **Omnichannel** or **Customer Service**, and then select **OK**.

> **Note**
>
> For Dynamics 365 Customer Service, you can run the health check from **Analysis Jobs** in the **Service Management** site map of Customer Service Hub.

Analyze the health check results

After the analysis job completes its run, the results are displayed on the **Job Details** tab.

The following information is available:

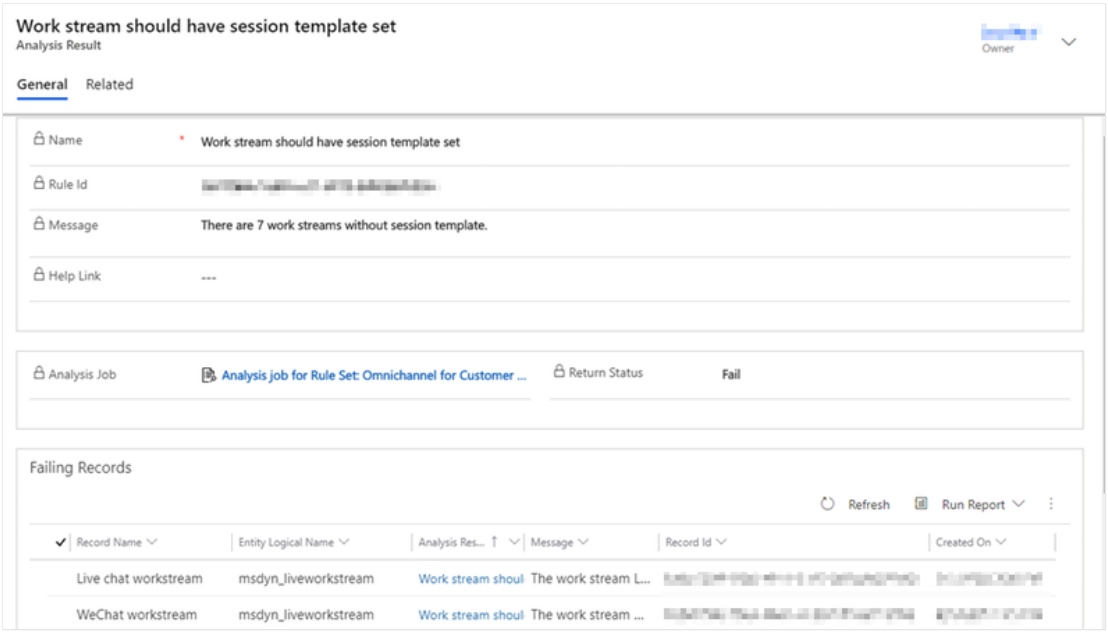
- **Name**: The name of the analysis job.
- **Status**: The status of the run.
- **Start Time**: The date and time when the job was started.
- **End Time**: The date and time when the job completed its run.
- **Failed Rules**: The number of rules that failed.
- **Warnings**: The number of rules that resulted in warnings.
- **Passed Rules**: The number of rules that passed successfully.
- **Total Rules**: The number of available rules.
- **Rule Run Count**: The count of rules that have been run.

The details of the results are displayed in a table as follows:

- **Name**: The name of the rule.
- **Message**: A brief summary of the result.
- **Return Status**: Whether the rule passed, failed, or returned a warning.
- **Severity**: The severity level.

You can do the following:

1. Select a rule for which the status appears as failed. The analysis results of the failed objects are displayed in the **Failing Records** area.



2. Optionally, select the **Summary** tab for an overview of the results.

> **Note**
>
> If you see any discrepancy in the health check results, rerun the job.

Out-of-the-box rule sets for Dynamics 365 Customer Service

The out-of-the-box rules for Dynamics 365 Customer Service are as follows. These rules can't be edited.

Rule	What the rule checks for	Reason for failure and fix
Automatic Record Creation process definitions in draft status	Checks whether `ExecutePrimaryCreatePostActions` and `ExecuteARC` custom actions are in the active or draft state when a rule for creating records automatically is being used.	The processes to create records are deactivated automatically. Review whether the deactivated processes are required for your business logic and reactivate them if necessary. You can select the rule and then select **Resolve**, which will activate the processes.

Rule	What the rule checks for	Reason for failure and fix
Check if activity monitor for automatic record creation is enabled.	Check for `msdyn_ArcActivityMonitorForFailedScenarios` and `msdyn_ArcActivityMonitorForSkippedScenarios` flag values to decide whether activity monitor is enabled.	Activity monitor isn't enabled for creating records automatically. Enable the activity monitor to monitor rules to know whether they succeeded or failed. For more information, see Use activity monitor to review and track rules.
Check if `autoRouteToOwnerQueue` for the `Email` entity is enabled.	Checks whether rules to create records automatically are enabled and autoroute to owner queue is set on the `Email` entity.	The rule for creating records automatically might not be triggered to the right user if the **Automatically move records to owner's default queue** check box is selected for the Email entity. For more information, see Entity records routing.
Check if Customer Service forms are from unmanaged layer.	The rule fails when Customer Service forms are found in the unmanaged layer.	Customer Service forms are found in the active layer. Because unmanaged solutions overwrite Customer Service metadata fixes, we recommend that you don't place the system forms in active layers in a production environment.

Check workflow type for convert rule and convert rule items	• **Modern rule**: Associated workflow should be a Power Automate flow
	• **Legacy rule**: Associated workflow should be a legacy workflow
	• Workflow state check
	  ◦ **Active rule**: Associated workflow on the rule and rule item should be present and in active state.
	  ◦ **Draft rule**: The rule for creating records automatically should have no associated workflow; the rule item should have an associated workflow in the draft state.
		• **Workflow type issue**: You've performed an activate or deactivate action on a legacy rule in Unified Interface form.
		• **Workflow type issue**: Created rule items for a modern rule in the legacy experience.
		• **Workflow state issue**: You've turned on or off flow in Power Automate.
		
		How to fix the issue
		
		• **Workflow state issue**: should be automatically corrected for the customer to update the relevant workflow to its required state.
		• **Workflow type issue**: contact Microsoft Support
		
		We recommend the following:
		
		• Rules created in Unified Interface should only be edited, activated, or deactivated in Unified Interface experience.
		• Rules created in legacy experience should only be edited, activated, or deactivated in legacy experience.
		• In Power Automate, do not manually turn on or off flows to create records automatically.

ConditionXml format check	• **Modern rule**: The `conditionxml` attribute value of all the related rule items should be in fetchxml format. • **Legacy rule**: The `conditionxml` attribute value of all the related rule items should be in conditionxml format.	• Format is mismatched in the rule type for creating records automatically. • You've performed the activate or deactivate action on a legacy rule in the Unified Interface form experience. • You've created rule items of a modern rule in the legacy experience. We recommend that the rules created in the Unified Interface app and legacy app be edited, activated, or deactivated in the corresponding app, respectively, and do not use the apps interchangeably.
Custom customizations on the Customer Service Hub site map	Checks for customizations on the Customer Service Hub site map.	Fails when the site map is customized. For more information, see Merge site map customizations.
Custom customizations on the Customer Service Workspace site map	Checks for customizations on the Customer Service workspace site map.	Fails when the site map is customized. For more information, see Merge site map customizations.
Customized option sets	Detects whether any option set in Customer Service has been customized. Customizing option sets can lead to unexpected behavior for unintended option sets.	Option set has been modified by customization. Manually remove customizations from the Customer Service option set if they aren't required for your business.
Deleted Sdk message processing steps	Checks whether any SDK message processing steps are deleted. Deleted SDK message processing steps will lead to incorrect behavior when using Customer Service.	Fails if any of the shipped Customer Service SDK message processing steps have been deleted from the system. Contact Microsoft Support to resolve the issue.

Rule	What the rule checks for	Reason for failure and fix
Disabled Sdk message processing steps	Checks whether any SDK message processing is disabled. Disabled SDK message processing steps will lead to incorrect behavior when using Customer Service.	`SdkMessageProcessingSteps` are deactivated. Review if the disabled `SdkMessageProcessingSteps` processes are required for your business logic and reactivate them if necessary.
Process definitions in draft status	Checks whether any process definitions related to Customer Service are in draft status. **Note**: The `ManageContract`, `Contractline`, and `Entitlement` workflows are excluded from the validation check when they are in the draft state.	Processes are deactivated. Customer Service might not work correctly when processes are disabled. To resolve the issue, reactivate process definition from customizations.
Process definitions owned by disabled users	Checks whether any process definitions in the system are assigned to disabled users.	Processes will fail because they are owned by disabled users. Make sure that all workflows are assigned to users who have the required permissions. To resolve the issue, reactivate the user accounts that own workflows or assign the workflows to another user account with the proper security privileges.
Validate Email response template type for Modern Automatic Record Creation	The template type code of the auto-response email template set on a rule should match the primary entity set on all its rule items: • `responsetemplateid` stores the auto-response email template on the `convertrule` entity. • `templatetypecode` stores the template type code on the email template entity. • `primarycreateentitylogicalname` stores the primary create entity on the `convertruleitem` entity.	The template type code of the auto-response email template set on a rule didn't match with the primary entity set on its rule items. As a result, the automatic response won't be sent because the template type didn't match the rule item primary action entity type. But won't cause failure.
Waiting workflow instances are owned by disabled users	Detects waiting workflow instances that are assigned to disabled users. These workflows will fail to correctly generate the records that they are supposed to generate.	The workflows are assigned to disabled users. To resolve the issue, reactivate the user accounts that own the workflows or assign the workflows to another user account with the proper security privileges.

Out-of-the-box rule sets for Omnichannel for Customer Service

When you run the analysis job, the following out-of-the-box rules are run. These rules can't be edited.

Rule	Description
Agents should have capacity	Verifies that capacity has been defined for agents. For more information, see Manage users.
Bots should have capacity	Verifies that the bot's capacity is greater than zero. For more information, see Configure a bot.
Bots shouldn't have potentially low capacity	Verifies that the bot's capacity is at least a hundred times the capacity of the work stream.
Custom channel configuration should have work stream	Verifies that all custom channels have an active work stream. For more information, see Configure a custom channel.
Custom channel settings should have all required fields	Verifies that custom channel settings have the messaging endpoint URL field.
Facebook page configuration should have work stream	Verifies that all Facebook pages have an active work stream. For more information, see Configure a Facebook channel.
Facebook settings should have all required fields	Verifies that Facebook channel settings have the messaging endpoint URL field.
Line channel configuration should have work stream	Verifies that all LINE channel configurations have an active work stream. For more information, see Configure a LINE channel.
Line settings should have all required fields	Verifies that the LINE settings webhook URL isn't empty.
Live chat channel configuration should have work stream	Verifies that Live Chat has an active work stream. For more information, see Configure a chat channel.

Rule	Description
Omnichannel service endpoint should be configured	Verifies that the underlying services needed for the functioning of Omnichannel for Customer Service are configured correctly. For more information, see Provisioning Omnichannel for Customer Service.
Queues should have agents	Verifies that the queues that are assigned to the work streams have agents assigned. For more information, see Manage queues.
SDK message/plugins should be active	Verifies that the SDK messages or plug-ins are active. For more information, see Remove deactivated or disabled customizations.
SMS channel configuration should have work stream	Verifies that the SMS channel has an active work stream. For more information, see Configure an SMS channel for TeleSign and Configure an SMS channel for Twilio.
SMS settings should have all required fields	Verifies that SMS settings don't have empty customer ID and API key fields.
Teams channel configuration should have work stream	Verifies that the Microsoft Teams channel configuration has an active work stream. For more information, see Configure a Microsoft Teams channel.
Teams settings should have all required fields	Verifies that the bot ID field isn't missing from the Teams settings.
WeChat channel configuration should have work stream	Verifies that all WeChat channel configurations have an active work stream.
WeChat settings should have all required fields	Verifies that the **IP allowlist** and **Server address (URL)** fields aren't empty in the WeChat settings. For more information, see Configure a WeChat channel.
WhatsApp channel configuration should have work stream	Verifies that all WhatsApp phone numbers have an active work stream. For more information, see Configure a WhatsApp channel.
WhatsApp settings should have all required fields	Verifies that WhatsApp settings have a valid Twilio inbound URL and validation hasn't failed.
Work stream capacity should be less than agents	Verifies that the capacity defined for agents is more than that defined for the work streams. For more information, see Understand work streams.
Work stream should have notification templates set	Verifies that notification templates have been set for work streams. For more information, see Associate templates with work streams.
Work stream should have session template set	Verifies that session templates have been set for work streams. For more information, see Associate templates with work streams.
Work stream shouldn't have duplicate context variables	Verifies that duplicate context variables haven't been defined for work streams. For more information, see Create a work stream.
Work stream shouldn't have empty routing rules above rules with condition	Verifies that empty routing rules haven't been defined for a work stream that prevents routing rules with a lower priority from running. For more information, see Create and manage routing rules.
Work stream with push mode shouldn't allow offline mode	Verifies that "Offline" isn't an allowed presence for work streams that have push mode enabled. For more information, see Create a work stream.

See also

- Troubleshoot issues in Omnichannel for Customer Service
- Frequently asked questions

Feedback

Was this page helpful? Yes No

Get help at Microsoft Q&A

Integrated search provider data on the Insights tab isn't updated after a scheduled refresh

Article • 07/10/2023

This article provides a resolution for the issue where the search provider may have been configured incorrectly in Dynamics 365 Customer Service.

Symptoms

Data isn't updated on the **Insights** tab for integrated search providers even after the scheduled refresh interval time.

Resolution

Take the following troubleshooting steps to diagnose and fix the issue:

1. Make sure the provider's root URL and sitemap URL are correct. Browse through the URLs to confirm they're valid addresses.
2. Make sure the **External Reference Id** field is mapped to a unique field in the source property. The ID is expected to be unique. Mapping this field to nonunique fields in the source will cause issues when articles are ingested.
3. Make sure you haven't set the **Refresh interval** to **No refresh**.
4. If the source is authenticated, make sure the secret you provided is correct.

If the issue persists, contact Microsoft Support to raise a ticket.

See also

For more information about managing a search provider, see Manage integrated search providers.

Feedback

Was this page helpful? Yes No

Report issues in Omnichannel for Customer Service

Article • 06/02/2021

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

The report issues feature in the Omnichannel for Customer Service app allows you to capture a diagnostic report of the issues and share it with Microsoft.

> **Important**
>
> The report issues feature is not supported in Omnichannel for Customer Service on Unified Service Desk.

You can copy the information while communicating with a customer by using one of the following keyboard shortcuts.

- **Ctrl** + **Shift** + **Alt** + **d**
- **Ctrl** + **Shift** + **Alt** + **D**

Capture diagnostic report

1. Sign in to Omnichannel for Customer Service.
2. Use the keyboard shortcut to copy the information. Repeat the step if a message indicates that the copy action was unsuccessful.
3. Open a notepad in your computer.
4. Paste the diagnostic report in the notepad, and save.
5. Share the diagnostic report when you contact Microsoft support.

Diagnostic report information

The diagnostic report doesn't contain any of your personal information and contains the following information that's specific to Omnichannel for Customer Service.

Name	Display name in the report
Timestamp	timestamp
Provider name	activeProviderName
Client URL	ClientUrl
App URL	AppUrl
Organization locale ID	OrgLcid
Organization unique name	OrgUniqueName
Organization Id	OrgId
User locale Id	UserLcid
User roles Id	User roles
CRM version	crmVersion
Tenant Id	TenantId

If you, as an agent or supervisor, are in a session with a customer, and capture the report, then with the details mentioned in the preceding table, the following global context and conversation context details are also copied.

Name	Display name in the report
Timestamp	timestamp
Provider name	activeProviderName
Client URL	ClientUrl
App URL	AppUrl
Organization locale Id	OrgLcid
Organization unique name	OrgUniqueName
Organization Id	OrgId
User locale Id	UserLcid
User roles Id	User roles

Name	Display name in the report
CRM version	crmVersion
Tenant Id	TenantId
Omnichannel API URL	ocApiUrl
Conversation Id	conversationId
Session Id	sessionId
Conversation Type	conversationType
Transaction Id	transactionId
Transaction parameters	transactionParameters
Live work item Id	liveWorkItemId
Channel Id	channelId

See also

Best practices to use Omnichannel for Customer Service

Share feedback for Customer Service

Article • 04/04/2022

You can share feedback about Customer Service, such as the features, UI, and issues, by using the feedback option.

Share feedback

You can share product feedback in Customer Service Hub and Customer Service workspace.

To share feedback

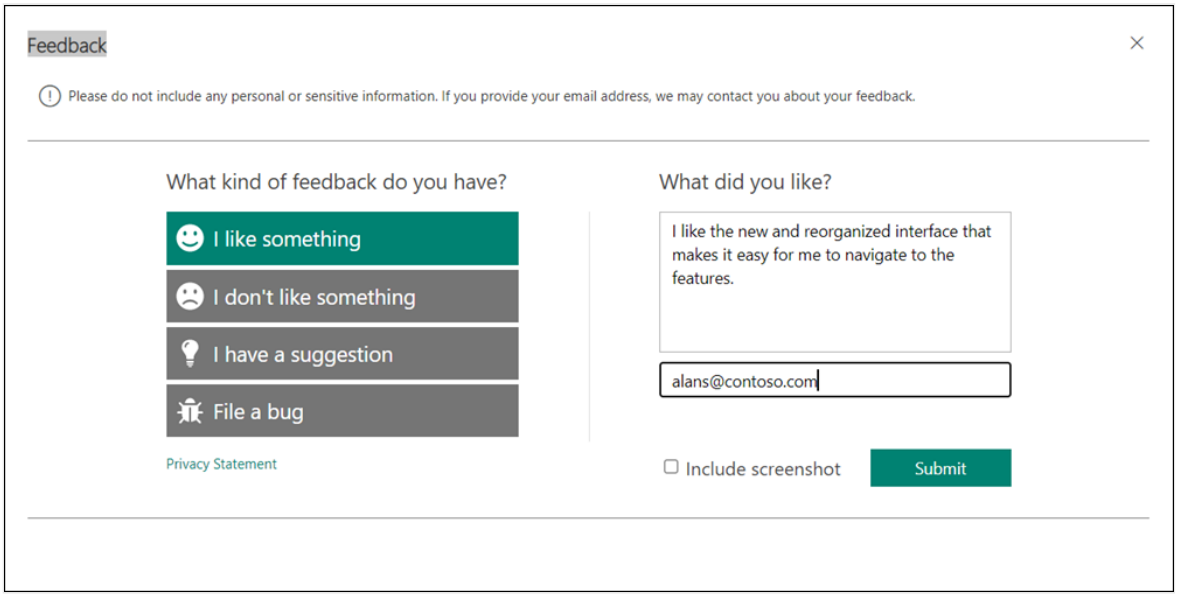
1. In one of the apps, on the top-right corner of the navigation bar, select the **Send Feedback** icon. The **Feedback** dialog displays the following options:

   - I like something
   - I don't like something
   - I have a suggestion
   - File a bug

2. Select one of the options. The app displays the <*label*> box.

3. Optionally, you can do the following:

   - Use the box to add details.
   - Share the mail ID of your choice; Microsoft Support might use the mail ID to contact you.
   - Attach a screenshot.



4. Select **Submit**.

See also

Overview of Dynamics 365 Customer Service
Get started with Customer Service workspace
Learn the basics of the Customer Service Hub

FAQ about Customer Service admin center

Article • 10/26/2022

Overview

This article contains the frequently asked questions (FAQ) that you as an administrator might have about the Customer Service admin center app.

What's the difference between Customer Service admin center and Omnichannel admin center?

Customer Service admin center unifies all the administration settings in Customer Service Hub, Omnichannel admin center, and app profile manager. The site map is task oriented, with overview pages and feature landing pages to easily locate each capability. The user experience is consolidated and improved, and you don't need to migrate any data. Try the new app for centrally managing the features.

Can I customize this new application?

Similar to other apps, you can use the App designer to customize the site map entries. If you have custom entities to manage different aspects of your business, then you can add them to the Customer Service admin center site map to avoid using a separate app. To avoid conflicts with the out-of-the-box site map entries, we recommend that you create a new sub area to add your site map entries.

When do you plan to deprecate the existing admin experience?

Customer service admin center has been generally available since April 2022. We've announced the deprecation and subsequent end of support for Omnichannel admin center, service management experience in Customer Service Hub, and app profile manager. We recommend that you start using the Customer Service admin center app for the seamless benefits it offers. More information: Deprecations in Customer Service

How do I move from the existing admin apps to Customer Service admin center?

You can start using Customer Service admin center immediately if you don't have any customizations in your existing admin apps. However, if you have any customizations, you'll need to redo them in Customer Service admin center using the App designer.

Why do I see deprecated apps in the organization?

The Omnichannel Administration and Omnichannel admin center apps have been deprecated and therefore are hidden by default. However, the apps will be visible in Power Apps.

See also

Get started with Customer Service admin center
Overview of Customer Service

FAQ about unified routing in Customer Service, Omnichannel for Customer Service

Article • 08/11/2023

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

Overview

This topic contains the FAQs that you as an administrator, supervisor, or agent might have about unified routing.

General

What SKUs must I have to get unified routing?

See prerequisites for licensing information.

What will happen to my current workstreams after unified routing is installed?

For messaging channels, use the migration utility to migrate the workstream and associated routing rules. For entity routing, you'll configure new workstreams and rules in unified routing. More information: Migrate workstreams created in Omnichannel Administration.

What are the implications when migration is in progress?

There is no downtime involved when you are migrating the workstreams, but it's recommended that you perform the migration during low load or off hours.

Why do I see workstreams that I didn't create in Omnichannel Administration?

These workstreams were created either in the Customer Service admin center or Customer Service Hub app. In the Omnichannel Administration app, you'll see all the workstreams irrespective of the app that has been used to create them. We recommend that you manage the workstreams in the same app that you used to create them.

How do I migrate my configurations from the Omnichannel Administration app to the Customer Service admin center app?

To migrate the messaging workstreams, you can use the Unified Routing Migration Application. For information on the migration tool and instructions, see Migrate workstreams created in Omnichannel Administration.

> **Note**
>
> After you migrate the workstreams, you'll be able to manage them in the Customer Service admin center app. We recommend that you familiarize yourself with the app before migrating. More information: **Get started with Customer Service admin center**.

Can I manage my workstreams in the Omnichannel Administration app post migration?

No. Although you will see the migrated workstreams in the old admin app as well, we recommend that you manage the migrated workstreams in the Customer Service admin center app.

What are the implications when I start the migration process for the workstreams?

There is no downtime when you are migrating the workstreams, but we recommend that you perform the migration during low load or off work hours.

Is it possible to roll back the migration?

To roll back the migration, you will need to contact Microsoft Support.

How can I migrate the entity routing workstreams?

Entity routing workstreams must be recreated in Customer Service admin center and the rules must be manually recreated in the new workstream.

If you need further help, contact Microsoft Support.

Can I create workstreams for routing records in the Omnichannel Administration app after upgrading Omnichannel for Customer Service to 2021 release wave 1?

No. After upgrade, you'll no longer be able to create workstreams for routing records because they won't work as expected. We recommend that you start using the Customer Service admin center app to create and manage routing of records.

Will unified routing support activity routing?

Yes, unified routing supports routing activities, including email.

What happens to my existing queues after I migrate to unified routing?

The existing queues will be automatically migrated to unified routing.

Can I route any record type by using basic routing?

No. Basic routing can be used for cases only. To route any record type, use unified routing.

Is there a priority among queues? Can we use the field Group Number or Priority? Does it affect the order of the case assignment?

No. There's no priority among queues. However, you can prioritize records within a queue.

Can I pause the assignment of a case?

No. It's not possible to pause the assignment of a case.

Can agents pick work items of records to which they don't have permissions?

Yes, agents can pick the work item even if they don't have permission to access the record. However, they can't view the details and the conversation will be closed. For more information, see the note in Set up record routing.

Can supervisors assign work items pertaining to inaccessible records?

Yes. However, the conversation will be closed if agents don't have sufficient permission to access the records.

Can I export a unified routing configuration and sign in to another environment?

Yes, you can export a configuration with unified routing content for the record type and live chat channel. For more information, see the following articles:

- Migrate data for the record channel
- Migrate data for the live chat channel

I have two workstreams (W1, W2) and four queues (Q1, Q2, Q3, Q4) and a case (C1) is assigned to Q2. Is it possible to now reassign C1 to Q3?

Yes. It's possible to reassign a case to another queue. On the case form, select **Save and route** to reassign the work item from one queue to another queue.

Why am I not able to see the Keep same agent for entire conversation toggle in my Work distribution settings for a workstream related to cases?

A case remains with the agent that it was initially assigned to and therefore the corresponding workstream for cases doesn't have the agent affinity toggle.

Can I access Omnichannel Ongoing Conversations Dashboard and Omnichannel Intraday Insights in Customer Service workspace?

Yes, you can access Omnichannel Ongoing Conversations Dashboard and Omnichannel Intraday Insights in Customer Service workspace if you have the Chat for Dynamics 365 Customer Service or Digital Messaging for Dynamics 365 Customer Service license.

How are unassigned work items in a queue handled if no matching agent is found?

The unassigned work item remains in the queue until you manually assign it to an agent or route it to another queue. More information: How assignment rulesets work

Work item assignment

Can I increase the limit on assignment offer of work items to agents?

Yes, you can update the limit. More information: How the limit on offering a work item repeatedly to an agent works

Route to most-idle agent

For which channels is routing to most-idle agent (preview) available?

In the preview release, the feature is available for the voice channel only.

Is presence used in determining the most-idle agent?

No, presence isn't used. Only capacity release information is taken into account.

Does the agent sign-in time affect in the calculation of the most-idle agent?

The agent’s last capacity release time only affects the idle time used by the most-idle assignment method. The agent sign-in times don't impact the capacity release time.

How is a tie-breaker scenario resolved if two or more agents match the idle time?

If the last capacity release time, which is the time since the agent is idle, is the same for two matching agents, then assignment will be done in a round-robin manner.

Can I see diagnostics for routing to the most-idle agent?

Yes, the assignment method stage displays the assignment method that's used.

Intelligent skill finder

Will intelligent skill finder be available in all geographical regions?

Intelligent skill finder requires AI Builder to create and train the machine learning model. If AI Builder is not available in the customer region where unified routing is, the customer will get a generic error when trying to set up the model.

Can I use intelligent skill finder with email activities?

Yes, intelligent skill finder can be enabled for any entity that is enabled for routing by using any text-based field. For email body skill finder, an additional step is required because email body (description) includes HTML tags that can impact the machine learning model. You'll extract the text from HTML, copy it into another text field, and then configure the machine learning model against the new field.

How do I make sure that the right skills are attached to the work items when the machine learning-based model is in use?

- Ensure that agents are trained to attach correct skills, review, and correct any incorrectly attached skills.
- Review the skill finder model to make sure that the training data is correct and retrain the model periodically to improve it.

Capacity profiles

I have a work item labeled with two capacity profiles and three agents who match at varying levels. Which agent is eligible for assignment?

If two of the agents match one each of the required capacity profiles and the third agent matches on both the required capacity profiles, then the work item is assigned to the third agent. More information: Use capacity profiles

See also

Overview of unified routing
System requirements for Omnichannel for Customer Service
Set up unified routing for records

FAQ on managing cases

Article • 06/06/2023

A few answers to common questions on the various scenarios in managing cases are listed here.

General

How can I create a case when the contact isn't linked to the customer organization?

Out of the box, agents can't create a case because the contact isn't associated with the customer organization. However, you can customize case forms and remove the validation on contact and allow unrelated contacts be linked with the case.

Why can I use only few columns to search in the Case view?

To search on columns of your choice, make sure that the quick find search is configured for the required search parameters. More information: Use quick find search.

Why do agents get permission errors when they try to access, create, delete, or update a case?

If the role assigned to agents is missing security privileges, permission errors are displayed when they perform case actions. For example, the following error is displayed when an agent tries to access a case, and the role assigned to the agent is missing read privileges:

Principal user (Id= <GUID>, type=8, roleCount=5, privilegeCount=465, accessMode=0), is missing prvReadincident privilege (Id=<GUID>) on OTC=112 for entity 'incident'. context.Caller=<GUID>

To resolve the error, ensure that role assigned to the agent has read access to the case entity. More information, see: Security roles and privileges. You can also refer to the out-of-the-box Customer Service Representative role before you create custom roles or modify permissions of roles assigned to agents. More information: Roles and personas

FAQ on resolving cases

Why can't I see Billable time, Remarks, or Total time fields on the case resolution dialog box?

As part of April 2023 wave, by default, agents see the minimal case resolution dialog. The minimal case resolution dialog displays the **Resolution Type** and **Resolution** only. You can disable the minimal case resolution dialog and switch to the legacy experience. More information: Disable the minimal case resolution dialog.

> **Note**
>
> - You can revert to the legacy case resolution dialog only if the **Case settings** > **Other settings** > **Resolve case dialog** is set to **Standard dialog** in Customer Service admin center.
> - If **Resolve case dialog** is set to **Customizable dialog** or **Quick create dialog**, to add **Duration**, **Billable Time**, **Total Time** and other customizations, perform the steps in **Add or remove fields from the case resolution dialog**.

Can I update cases after they're resolved or canceled?

Yes, agents can update the case description or other information after the case has been resolved or canceled. You must configure and run flows in Power Automate or an API to update the case without having to reopen the case records. More information: Allow updates for resolved and canceled cases.

Why isn't the billable time isn't automatically updated on the case resolution dialog?

Billable time is the amount of time the agent spent on the case and can be billed to the customer. The application automatically calculates and displays the **Billable Time** value on the case resolution dialog, only if the **Total Time** field is also available on the dialog. If **Total Time** isn't displayed, agents have to manually add the billable time. More information: Add or remove fields from the case resolution dialog.

Can I customize the case resolution dialog?

Yes. More information: Modify the case resolution dialog.

Why can't I see the custom value I added to Case resolution type field in the case resolution dialog?

Make sure that you've added the custom value to both the **Case** and **Case Resolution** entity for the custom value to be displayed on the case resolution dialog. More information: Add custom values to the case resolution dialog.

Why can't I set the Case Status field on a case to Resolved?

A case is resolved only when you select **Resolve case** on the command bar. You can't set the value of the **Case Status** field to **Resolved**. More information: Resolve a case.

Why do I see errors when I try to resolve a case?

Resolve a case isn't supported if **Regarding** is configured in **Case resolution dialog**, and agents will see errors if they try to resolve the case.

Enhanced case experience

I used the form selector on the Enhanced full case form to navigate to another form. Why can't I go back to the enhanced form?

The **ShowInFormSelector** option in Enhanced full case form is set to **False**, by default. Set **ShowInFormSelector** to **True**, to see the **Enhanced full case form** option in the form selector and navigate back to it.

Why are agents seeing the Enhanced case form when they create a case even if I haven't enabled Enhanced case experience?

If the **Enhanced full case form** has a higher form order than the default case form, agents might see the enhanced full case form even if you haven't enabled the enhanced case experience. If you'd like agents to see the default case experience, set the form order of the enhanced form lower than that of the default form. More information: Control access to model-driven app forms.

Why do my existing cases open in the default case form when I've enabled the enhanced case experience?

You must set the **Enhanced full case form** as the default form for your agents to see the enhanced full case form when they open an existing case. More information: Control access to model-driven app forms.

Resolve form issues

How can resolve the discrepancies in the number of buttons displayed on the command bar and ribbon issues in my case form?

If agents see buttons being hidden or extra buttons displayed on the form, you can use the **Command Checker** tool to troubleshoot the issue and also see what command will run when a button is clicked.

You can follow the steps in Troubleshooting ribbon issues in Power Apps to resolve ribbon issues.

How can I identify and resolve form issues effectively?

Form issues occur because of business rules, JavaScript, form events, or client API that administrators and makers have set. Monitor is a tool that can help you debug and diagnose problems, and can also help identify whether the issue experienced is designed out-of-the-box or due to a customization. More information: Use Monitor to troubleshoot model-driven app form behavior.

FAQ about automatic record creation

Article • 06/23/2023

FAQ about automatic record creation and activity monitor

The following section provides answers to questions about automatic record creation and activity monitor.

What are the scenarios in which the rule skips creating records automatically?

The automatic record creation rule doesn't create records in the following scenarios:

Reason 1

Email is from an unknown sender.

Resolution: On the **Advanced** tab of the **Record creation and update rule** page, select **Yes** for **Allow emails from unknown senders**, and choose an option in **Manage unknown senders by** according to your business needs. More information: Configure advanced settings for rules.

Reason 2

A resolved case is already connected with this record.

Resolution: On the **Advanced** tab of the **Record creation and update rule** page, select **Yes** for **Wait for a specific amount of time after the connected case has been resolved**, and specify the time in the **Select the amount of time** option. More information: Configure advanced settings for rules.

Reason 3

No valid entitlement for this email sender.

Resolution: On the **Advanced** tab of the **Record creation and update rule** page, select **No** for **Require a valid entitlement on the connect case**.

Reason 4

No applicable reason can be specified.

Resolution: If the reason is empty and the state says **Ready for workflow/Power automate**, and the case doesn't get created, then check system jobs if it's a legacy rule, or check flow runs if it's a modern rule.

Why do multiple cases get created from a single email?

Multiple cases can get created from a single email because of various reasons. Perform the following steps to check if multiple cases were created for an email.

1. Enable the activity monitor options: **Ready for Power Automate / Workflow** and **Skipped**. More information: Manage activity monitor to review and track rules
2. Send a new email to reproduce the issue.
3. You should see new activity monitor records in the grid for the new test email. Multiple activity monitor records for the email indicates that there are multiple queue items created for the same email that have triggered the ARC rule. You can also view which rule got triggered on each activity monitor row. The activity monitor records with the **Ready for Power Automate** state indicate that they have reached the flow and are likely to create a case in each of them. If you see the described behavior, perform the next step.
4. Perform the following steps to identify where the duplicate queue items are from:
   a. Rule item flow definition, to verify if the child flow adds the email to queue. Duplicate queue items can be created because of various reasons, such as a flow step calling **AddToQueue** bound action, queue item creation, another custom flow which the ARC flow calls from within, or a post operation plugin of an action performed within ARC flow, such as case creation.
   b. Email background processes, to verify if there are any custom workflows. You can do this during live debugging, where successful background processes get cleaned up. If you don't see any background processes for an email received, it doesn’t necessarily mean that there are no custom runs.
   c. Multiple queues with active ARC rule set up in the email's recipient or CC list. By default, an email gets added to all the queues which are listed as recipient and CC.

FAQ about modern automatic record creation

The following section provides answers to questions about migrated rule or flows in modern automatic record creation.

Why do I see two flows in Power Automate when I have an active modern or migrated ARC rule with only one rule item?

If you have an active rule with rule items, you'll see two flows, one with the name **ARC | rule name**, and another with the name **ARC: rule item name**. These flows are automatically turned on whenever you activate a rule. The ARC rule works only when these two flows are turned on.

For any inactive ARC rule, you'll see only one flow with the name **ARC: rule item name**. You won't see **ARC | rule name**, as this flow is created during rule activation. Even if you do see duplicate flows with the name **ARC | rule name** for the same rule, it won't cause any rule item issues. Even though they have the same name, only one of these flows is associated with the ARC rule, and only that flow will be invoked during run time.

What does the flow ARC | rule name do, and can I customize it?

The purpose of this flow is to evaluate all the rule item conditions to select the first match and invoke its associated flow. This flow shouldn't be customized.

I see that the ARC flow trigger is on the email update filtering on importsequencenumber attribute. Is it the reason that cases aren't being created for some emails?

No, all ARC flow triggers need to be on the update action with the **importsequencenumber** filtering attribute. This configuration isn't the reason if sometimes cases aren't being created for some emails.

Can I change the flow trigger to email create or remove the filtering attribute?

No, changing the flow trigger to the create action or removing the filtering attribute will lead the ARC flow to run during unexpected scenarios. This scenario will lead to infinite flow run issues.

When I export an ARC rule from an organization, what other required components do I need to include in the same solution?

You must include the rule item's associated flows with the ARC rules in the exported solution. You can include them by selecting the rule and then selecting **Add required components**. The rule item's associated flows need to be named as **ARC: rule item name**. Don't include flows with the name **ARC | rule name** in the solutions.

I imported a modern ARC rule with its associated flows. After I activate the imported rule, I see duplicated flows with name ARC | rule name in the Power Automate portal. Will this affect run-time issues like creating duplicate cases?

No, runtime or create duplicate cases won't be affected. The flow with name **ARC | rule name** is created during rule activation. The reason you'll see duplicates is because those duplicated flows were included in a managed solution and imported to the organization. See the previous question for what must be included while exporting or importing an ARC rule through solution.

Can I turn off or on ARC flows directly in the Power Automate portal?

No, don't turn off or on any ARC flows directly in the Power Automate portal. Only enable or disable ARC flows from Microsoft Dataverse.

See Also

Troubleshoot common configuration issues with automatic record creation and update rules

Incoming email isn't converted to a case

FAQ on AI suggestions for cases and knowledge articles

Article • 05/27/2022

A few answers to common questions about the AI-suggested similar cases and knowledge articles are listed here.

I've enabled suggestions, but smart assist keeps showing me "No suggestions found" message

This might be caused by one of the following reasons:

- If it's the first time you've enabled suggestions, it might take up to 24 hours to complete the pre-processing from your existing published knowledge articles and resolved cases before suggestions will be displayed.
- The first time pre-process operation handles up to 1,500 published knowledge articles and 10,000 resolved cases from the most recent ones. Older articles and resolved cases aren't picked up from the first time pre-processing, so they won't be surfaced as suggestions.
- Suggestions are displayed only for active cases. Suggestions are updated when an active case is created or updated.
- The case title or description isn't clear enough to describe the problem, therefore, the model can't find articles or similar cases that match what's described.

I get an error message that the selected language isn't supported

You need to make sure that your language setting matches one of the languages supported by AI suggestions. More information: Language support for AI suggestions.

I get an error message that detected language doesn't match the language settings.

The AI model is used to detect the language of the cases and conversations. If the language detected doesn't match the language in the settings or if the language isn't

supported, suggestions aren't displayed. If the case or conversation doesn't contain enough information or contains mixed languages, the AI model may not be able to detect the language correctly. More information on how language support works, see Language support for AI suggestions.

I get an error message in Suggestions settings page, "We couldn't pre-process the case records or knowledge articles". What should I do?

Check whether all the prerequisites have been met for generating the models. Particularly:

- Make sure all required workflow processes installed with the feature are activated.
- Background operations are enabled when administration mode is enabled in the environment.For information about how to update the administration mode, go to Administration Mode.

If everything is correctly enabled but the error message still appears on the settings page the next day, contact Microsoft Support.

I've added more details about the problem in an active case, but the suggestions aren't refreshed at all

You're required to reopen the case form to see new suggestions.

I can't see smart assist with suggestions expanded at all when I open a case

Make sure that the case is opened in a session tab. To open it in a session tab, select the case by holding down **Shift** while clicking.

See also

Enable AI suggestions for similar cases and knowledge articles
View AI-suggested similar cases and knowledge articles

FAQ about Omnichannel for Customer Service

Article • 09/20/2023

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Important**
>
> Support for the Omnichannel Administration app ended on April 30, 2022. The app will be removed in July 2023. We recommend that you use the Customer Service admin center app to configure the latest features, such as unified routing and voice channel. More information: **Omnichannel Administration app is deprecated**

General

What regions are supported?

See the list of supported regions at International availability of Microsoft Dynamics 365.

What platforms are supported?

You can find information about supported platforms and other prerequisites in Prerequisites and system requirements of Omnichannel for Customer Service.

Where can I submit an idea for a new feature or enhancement?

Submit your ideas and feedback on our Ideas forum.

Is there a forum for me to engage with and discuss issues with the broader community?

Yes, our Community Forum is the place where you can engage with the community at large.

How do I get help with the issues I face?

Contact Dynamics support to get help with your issues.

What channels are supported with Omnichannel for Customer Service?

Some of the supported channels are WeChat, LINE, and Facebook. For the complete list of supported channels, see Overview of channels.

Are Chat and the associated Omnichannel for Customer Service capabilities available as part of my Dynamics 365 Customer Service license?

No, Chat and related capabilities in Omnichannel for Customer Service require a separate add-in. For more information about licenses and pricing, see the Dynamics 365 licensing guide. You can also purchase add-ins on the Microsoft 365 admin center. More information: Buy add-ons

How do I get started?

If you would like to try out Chat for Dynamics 365 for free, sign up for a trial using these Instructions. Find Get started and Prerequisites for setting up Omnichannel for Customer Service in your organization.

Agent experience

In which apps can I use Chat for Dynamics 365?

You can use Chat in the Omnichannel for Customer Service and Customer Service workspace apps.

Can I work on cases along with chats?

Yes. You can work on cases alongside customer conversations in different sessions. You can open case sessions from the dashboards and grids using gestures. For more

information on starting a session, see Manage sessions in Omnichannel for Customer Service.

Can I work on third-party communication widgets built using Dynamics 365 Channel Integration Framework in the Omnichannel for Customer Service app module?

Omnichannel for Customer Service supports Chat for Dynamics 365 and SMS channels. You should continue to use the third-party communication widgets in the single-session Unified Interface apps like Customer Service Hub. Support for integrating third-party channels is available in Dynamics 365 Channel Integration Framework v2.

Can I open Omnichannel for Customer Service in multiple browser tabs and windows?

We recommend that you don't open Omnichannel for Customer Service in multiple browser tabs or windows. The app is inherently designed to help agents work in a multisession environment wherein each session has contextual application tabs. The sessions aren't synced across browser tabs.

What happens if I accidentally close the browser, refresh the entire page, or the browser crashes?

If you accidentally close your browsers, your currently open sessions and tabs opened inside them are lost; however, if you've entered some data on the model-driven forms where autosave has been enabled, they'll be saved into model-driven apps.

Ongoing chat and voice conversations appear on your Omnichannel Agent Dashboard. You can pick the chat or voice call from the dashboard and resume the conversation. The chat or voice call conversation is preserved, and you will be able to see the previous chat messages. If you were working on case sessions, you can reopen them using the gestures. For information on starting a session, see Manage sessions in Omnichannel for Customer Service.

Does consult only work for managers and supervisors?

No. You can consult with any available agent in the queue from which the chat originated. The consult list shows you agents in the queue who can take additional chat requests.

Can an agent who receives a consult also initiate a consult or transfer?

No. Only the primary agent of the chat can initiate transfers or consults. If the chat is transferred to another agent, the receiving agent becomes the primary agent and can initiate further transfers or consults.

Why are my agents not receiving any new conversations?

New conversation requests are assigned to an agent when:

- A new chat request comes in.
- The incoming chat request is assigned to a queue that matches the agent's assigned queues. You can see the queue and workstream for an incoming chat in the Omnichannel Conversation Dashboard.
- The agent presence is set to an **Allowed Presence** for the workstream.
- The agent has capacity to receive the incoming chat from the workstream. Remaining capacity can be checked by tallying up the items assigned on the agent's dashboard – including **Active** and **Wrap-up** – against the agent's configured maximum capacity.

Who can see internal messages?

Only agents and supervisors can see internal messages.

What does the timer in the communication panel represent?

The timer in the communication panel represents how long the current session tab has been open. If the chat has moved into a wrap-up state, the timer is reset and incremented accordingly to show the wrap-up time. If the conversation is closed and reopened later, the timer is reset.

How do I open chats on my dashboard?

For information about managing work items from your dashboard, see View agent dashboard and agent work items.

Where are conversations stored and how can I access them?

Conversations and sessions are stored as activity types within the model-driven apps. For more information, see View conversation and session activity types in the Model-driven apps.

FAQ on agent presence

This section helps answer some of the questions on how presence works.

When is the manual override of presence cleared?

The system clears your manual override when you become inactive or sign out from the application.

If the agent is inactive for less than 2.5 minutes, what does the system do?

If the agent is inactive for less than 2.5 minutes, the system will retain the manually overridden presence.

What happens to the agent presence when they resume work after showing as inactive?

When agents resume work after 2.5 minutes or more of inactivity, the system clears the earlier presence and calculates the presence afresh. We recommend that you refresh the browser after inactivity.

What factors are considered in presence refresh?

If the default presence set by the administrator is "Away" or "Offline", then the system will set the agent presence to the default setting. Otherwise, the system will calculate the presence based on the agent's used or released capacity.

Administrator experience

How does Automated Record Identification work with pre-chat fields?

If you're using multiple fields for automated record identification, they must all be an exact match. To learn more, see Automatically identify customers using pre-chat responses.

What do I do if my dashboards (Omnichannel Agent Dashboard, Omnichannel Conversation Dashboard, Tier 1 Dashboard, Tier 2 Dashboard) aren't showing up?

When you use the Omnichannel for Customer Service app on Unified Service Desk or on the web, the **Active Omnichannel Agent Dashboard** view doesn't show certain dashboards like **Tier 1 Dashboard**, **Tier 2 Dashboard**, **Knowledge Manager**, and **My Knowledge Dashboard**. To learn more, see Dashboards don't appear in Omnichannel for Customer Service active dashboards view.

How long does a configuration change to the Omnichannel for Customer Service and unified routing settings take to update?

All configuration changes to a feature or setting, such as updating a queue membership or workstream setting, can take up to 15 minutes to reflect.

How can I bring custom entities, forms, and dashboards into the Omnichannel for Customer Service app?

The Omnichannel for Customer Service app can be customized to include custom dashboards and custom forms the same as any Unified Interface app module. The sitemaps can be updated to include custom entities, and default forms can be changed to load custom ones for the entities. All Microsoft Dataverse entities and pages are compatible with the Omnichannel for Customer Service app.

Can I customize the Conversation Summary form?

Yes. For a list of supported customizations, see Customizations supported by the Conversation form.

Why am I not able to see the Intraday Monitoring report and datasets in Power BI service while configuring intraday insights dashboard for supervisors?

Creation of the IntradayMonitoring report may take up to 15 mins to appear in your configured Power BI workspace. While configuring the Power BI workspace in admin app, ensure that you have saved the configurations before you exit the configuration form. When you select **Save**, the creation of the report and dataset is initiated. If you missed saving the configuration, initiate the configuration for Supervisor Experience again. To learn more, see Configure Intraday insights for Omnichannel for Customer Service app on web.

What is the application ID field on the application user form?

The application ID is a mandatory field for creating application users in Dataverse. You can copy any application ID for any valid (non-expired) application created in Microsoft Entra ID for the same tenant into this field.

Supervisor experience

Can I monitor conversations for all channels?

Yes, you can monitor conversations for the voice channel and all messaging channels, including async channels.

Why am I not able to see the supervisor dashboards in my app?

Check the following:

- Make sure that the Omnichannel supervisor role is assigned to the user.
- For the Power BI intraday dashboard, ensure that the dashboard is shared with the user both on Power BI service and in the Omnichannel app.

For more information, see Configure Intraday Insights dashboard.

Why are my Chat Insights and Sentiment dashboard reports empty?

By default, the reports are installed with only a data connection. Once you start using chat and sentiment features, you'll see data come through.

How far can I go back in the historical report?

A maximum of 12 months or the most recent 100,000 records. The limitation of 100,000 records is a Power BI data limitation.

Can I customize reports?

Yes, you can customize the visualizations by editing the report in Power BI.

How frequently does the data refresh?

The dataset for the Live Monitoring report is real time; if a report is refreshed or filters are changed, the data will be updated as per the current state of the system.

The dataset refresh interval for Intraday and Chat Insights reports depends on your settings in Power BI. To learn more, see Configure Intraday Insights dashboard and Chat Insights set-up.

Why am I not able to see more than 100 agents while using filters in Omnichannel Ongoing Conversations dashboard?

By default, the application only displays 100 agents at any given time while filtering the conversation on the **Omnichannel Ongoing Conversations** dashboard. The list of 100 agents is displayed alphabetically. For example, you have 200 agents in your organization, and 100 agents have names that start with the letters A through D, the application only displays these agents. The rest of the agents with names that start with letters E through Z are not listed.

What controls are in place to limit the exposure of agent performance KPIs within my organization?

These controls are in place for exposing the data in reports:

- Access to the Power BI reports is controlled by Power BI access roles, and sharing within the Omnichannel app. To learn more, see Configure Intraday Insights dashboard
- Access to the Ongoing Conversation dashboard is controlled by the **Omnichannel supervisor** Dynamics role.

- Sentiment can be turned on or off in Customer Service admin center. To learn more, see Enable sentiment analysis

Chat widgets

Can I have the widget show on different pages or different websites?

The widget can show on any portal you want. You can copy the HTML script tag anywhere to make it appear on specific pages, a different Power Apps portals, or a custom portal as well.

If I have the widget on multiple pages or websites, what happens when I navigate across the pages with an ongoing chat?

The same widget will persist the chat as you cross different pages or websites.

Routing and work distribution

Can I route chats based on custom variables that we pass through code on my portal?

Yes, you can create custom context variables and create routing rules based on them. For more information, see the following articles:

- Understand and create workstreams
- Configure assignment methods for queues
- Manage custom context

Can routing in Omnichannel for Customer Service be used for other external channels (for example, my phone calls)?

Yes. In Omnichannel for Customer Service, routing can be used to route chat, SMS, and voice conversations.

SMS

What information from a TeleSign account do I need to enter while configuring the channel?

You'll need the customer ID, API key, and the phone number from your TeleSign account. More information: Sign up for TeleSign account

Why am I unable to validate the TeleSign account information using the Validate API key option in the admin app?

The Validate API Key functionality validates the customer ID and API key by trying to send a test message to one of the numbers provided in the **SMS phone numbers** tab. Ensure that the customer ID and API key are entered correctly, and the numbers provided in the **SMS phone numbers** tab can receive the text messages that are sent for validation. The phone number should have the country code with no plus sign (+), spaces or special characters. For example, this would be correct: 14251234567.

How can I know if I can get a phone number from TeleSign in a specific country?

See the TeleSign coverage map for Two-Way SMS. For any additional queries, we recommend that you send an email request to support@telesign.com.

Which phone number types are supported?

TeleSign supports long and short codes; the use of short codes with SMS messaging is supported as long as the customer is using an enterprise account.

Can I have my customers send international texts?

Support for this scenario by TeleSign can vary based on geography. We recommend that you send an email request to support@telesign.com for your specific scenario if text messages need to be sent or received across countries.

Can I communicate with customers using outbound SMS?

Yes. To send outbound SMS, you must first configure the SMS channel using Twilio, TeleSign, or Azure Communication Services. You can then create message templates, and use them to communicate with multiple customers.

More information: Configure an SMS channel for Twilio, Configure an SMS channel for TeleSign, Configure an SMS channel using Azure Communication Services, Create message templates

Does the SMS channel automatically identify the customer?

Yes, Omnichannel system will automatically identify the customer based on the incoming phone number. It will look for phone numbers in the **Mobile Phone** field of Contact records or the **Phone field** of Account records. Ensure that the phone number in these fields has the country code along with the plus sign (+) without any spaces or special characters. For example, this would be correct: +14251234567.

Can I send automated SMS responses?

Yes. In Omnichannel for Customer Service, you can send automated messages based on system-triggered or user-defined events. More information: Configure outbound messaging

Is there anything unique about the way SMS messages are routed to agents?

All channels integrated into Omnichannel for Customer Service have the same routing capabilities, including SMS. You can create routing rule items with conditions based on Account or Contact entities. Other entities (Case, Context variable, and SMS Engagement Context) aren't supported at this time and shouldn't be used for creating conditions in routing rule items in an SMS workstream.

Bot

Can a third-party bot be integrated with Omnichannel through this feature?

Only bots created through Microsoft Bot Framework can be integrated at this time.

See also

Overview of Dynamics 365 Customer Service
Omnichannel for Customer Service system requirements

FAQ about custom time calculation of SLA KPIs

Article • 04/04/2022

Overview

This topic contains the frequently asked questions (FAQ) that you, as an administrator, might have about the custom time calculation of service-level agreements (SLAs) key performance indicators (KPIs).

When does the custom action or plug-in get initiated?

The custom action or plug-in gets initiated during the creation of a new SLA KPI instance, which also includes a SLA KPI, that has been resumed from a pause status.

How is the pause and resume scenario different from a SLA KPI creation scenario?

The pause and resume scenario includes the following two steps:

1. The custom action is initiated with requestType as `getElapsedTime`. This calculates the time elapsed between the paused and resumed state of the SLA KPI.
2. The custom action is initiated with requestType as `getEndTime`. This calculates the new `WarningTime` by adding the above `elapsedTime` to the current `warningTime`. A similar calculation is also done for `FailureTime`.

How can I override the `StartTime` for a SLA KPI instance without creating and updating the custom DateTime field?

You can override the startTime of a SLA KPI instance based on the custom logic, whereby you have to change the `startTime` parameter.

```
  // when the case priority is modified and a new KPI instance is being
created, the KPI instance needs to start from UTC instead of CreatedOn
        if ((int)(((OptionSetValue)
(caseRecord.Attributes["priority"])).Value) == 1)
    {
            startTime = DateTime.UtcNow
    }

    // use OOB SLATimeCalculation Custom Action to do actual calculation_
    OrganizationRequest requestTimeCalculation = new
OrganizationRequest("msdyn_SLATimeCalculation");
    requestTimeCalculation["startTime"] = startTime;
        ... rest code is same as previous examples
```

How can I override the defined warning or failure duration of a SLA KPI instance?

You can override the warning or failure of a SLA KPI instance based on the custom logic, whereby you must change the following parameter. Note that the value provided must be in minutes.

```
// when the case priority is modified and a new KPI instance is being
created, the KPI instance must have failure time as 1 hour.
        if ((int)(((OptionSetValue)
(caseRecord.Attributes["priority"])).Value) == 1)
    {
            newFailureTime = 60; // in minutes
    }

    // use OOB SLATimeCalculation Custom Action to do actual calculation_
    OrganizationRequest requestTimeCalculation = new
OrganizationRequest("msdyn_SLATimeCalculation");
        requestTimeCalculation["minutes"] = newFailureTime;
        ... rest code is same as previous examples
```

```
```

FAQ about the voice channel in Omnichannel for Customer Service

Article • 08/25/2023

This article includes frequently asked questions (FAQ) about the voice channel.

Why is the agent unable to make an outbound call?

The agent must be a part of the outbound voice queue to make an outbound call. See Set up outbound calling for information.

Are overflow actions like voicemail and direct callback fulfilled for fallback queues?

No, overflow settings aren't applicable to fallback queues. The settings are ignored, and the routed work item is assigned to the queue. More information: How overflow works

Does the voice channel include real-time keyword recognition or sentiment tracking while an agent is on a call?

Yes, features such as sentiment analysis, agent suggestions for similar cases or knowledge articles, are available in the voice channel.

Is the voice channel PCI DSS compliant?

The voice channel is compliant with Payment Card Industry Data Security Standard (PCI DSS) today, but support for credit card data capture over voice isn't yet available. Agents have the ability to pause or resume call recording and transcription to avoid capturing sensitive information. Agents can also pause transcription to avoid dual-tone multi-frequency (DTMF) tones being captured in the transcript. All data is stored in Dynamics 365 and can be scrubbed by the customer.

Where does Azure Communication Services provide native PSTN services?

To register as a calling provider is a legally complex and country-specific process. Azure Communication Services has a multiyear road map to provide calling plans in different

countries and regions. To see all the countries where PSTN services are available, check the country availability page.

An alternative to Microsoft calling plans is Azure direct routing that allows you to bring your own phone numbers. More information: Azure direct routing

What about countries where Azure Communication Services doesn't provide native PSTN services?

Azure Communication Services is available worldwide, even if it isn't acting as the calling provider in certain countries. For these countries, Azure Communication Services provides a direct routing for local carriers, such as AT&T and Verizon, to connect to Azure Communication Services. With this mechanism, you'll still be able to deploy and use all the features of the voice channel in Dynamics 365.

What codecs are implemented in the voice channel?

The voice channel supports the G.711 and Opus codecs for PSTN and VoIP services.

Can I bring my own phone number?

Yes, you can bring your existing numbers to Omnichannel for Customer Service in the following ways:

- **Import numbers to Omnichannel for Customer Service**

    1. You must first port your existing phone numbers to Azure Communication Services. More information: Quickstart: Port a phone number into Azure Communication Services
    2. You can then import the phone numbers from Azure Communication Services to Omnichannel for Customer Service. More information: Sync from Azure Communication Services

- **Configure Azure direct routing**

    1. Configure a Session Border Controller (SBC) that's connected to your local carrier with Azure Communication Services.
    2. Register the phone number in Dynamics 365. More information: Bring your own carrier

Can my SBC and DNS server be deployed in different regions?

No. We recommend that the DNS server and SBC are deployed in the same region. More information: Bring your own carrier

How can I acquire extra phone numbers from Azure Communication Services?

You can purchase one phone number per tenant for Azure Communication Services through the Azure portal. To acquire phone numbers in bulk or request a specific phone number, follow the instructions to create a special number request order here .

Can I keep my existing contract with my carrier?

Yes, you can.

Can I configure a third-party voice provider in Omnichannel for Customer Service?

Yes, you can use the Dynamics 365 Channel Integration Framework 2.0 connector to integrate third-party contact centers, such as Genesys Engage, Solgari, and NICE inContact.

Does the voice channel tie in with Azure Communication Services or is it an entirely different technology?

The voice capabilities for Dynamics 365 Customer Service are built on Azure Communication Services.

Do I have to buy phone numbers from Azure Communication Services?

No, you don't have to. You can bring phone numbers from another carrier to use in the voice channel using Azure direct routing. More information: Bring your own carrier

If you've already brought numbers from another carrier into Microsoft Teams via Azure direct routing, then you can reuse your SBC and existing telephony infrastructure to bring those numbers into Azure Communication Services for use in the voice channel.

> **Note**
>
> Currently, you can't bring native Teams phone numbers to use in the voice channel.

Is it possible to enable voice integrations outside of the Omnichannel for Customer Service app, such as, by adding omnichannel capabilities to a customer's Dynamics 365 app?

No, the voice channel isn't supported in the other apps of Dynamics 365. It's supported in the Customer Service workspace and Omnichannel for Customer Service apps only.

How can I set up an IVR bot in the voice channel?

See the following articles to set up the interactive voice response (IVR) bot in the voice channel:

- Configure Power Virtual Agents bots for voice
- Integrate third-party IVR systems with voice channel

Should the language of the bot be the same as the primary language configured in the Customer Service admin center or Omnichannel admin center app?

Yes, the primary language of the bot must be the same as that of the voice workstream to which the bot is attached, but you can configure different geographic locales for the bot and the voice workstream to which it's attached. Let's consider an example where English is set as the primary language for the bot and its voice workstream. You can set different locales, such as **English-UK** in the voice workstream and **English-US** in the bot; the bot will speak in English-UK as the workstream locale setting takes precedence.

You can transfer conversations from one bot to another with different primary languages. For example, you can transfer conversations from an English bot to a Spanish bot. But, if you configure different locales:

- The bot's accuracy will depend on the similarities between the two locales.
- The preconfigured entities for the bot such as postal code might not be accurate.
- A bot-to-bot transfer of the conversation with the same language but two different locales isn't possible. For example, the transfer of a conversation from an **English-**

UK bot to an **English-US** bot can't happen. As a workaround, you can make the **English-UK** bot transfer the conversation to another phone number attached to a workstream to which the **English-US** bot is attached.

Can I recover data and phone numbers from a voice trial organization after it has expired?

No, you can't recover your data and phone numbers after the voice trial organization has expired and been deprovisioned.

Is disaster recovery supported for the voice channel?

- Business Continuity and Disaster Recovery (BCDR) for production instances of the voice channel are supported on a geographical basis. In certain regions BCDR will be a fast follow. For details on the geographies that are currently supported and the geographies where BCDR is a fast follow, see Local cloud deployments.
- In supported regions, BCDR policies are based upon business continuity and disaster recovery for Dynamics 365 and SLA for Azure Communication Services. For more information, see Business continuity and disaster recovery and SLA for Azure Communication Services.

Do you provide voice quality SLA for voice in Omnichannel for Customer Service?

No, we don't publish a voice quality SLA as many factors related to voice quality like network connectivity, speed, and bandwidth, can't be controlled. The SLA published for Azure Communication Services applies to the voice channel as well.

What tools are available to isolate performance and quality of voice channel?

The tools for isolating voice performance and quality are available through Azure Communication Services and can be found at Azure Communication Services media quality metrics. It might take up to two hours for the data to appear in the logs.

More information:

- Enable Azure Communication Services logs
- Azure Communication Services voice and video logs
- Integrate with user-facing diagnostics

- Use media quality statistics
- Use pre-call diagnostics
- Enable logging in Diagnostic settings
- Use Azure Communication Services communication monitoring plug-in

Does the voice channel support emergency calling?

Yes, the voice channel supports emergency calling; agents can call the emergency number during a crisis. This feature is currently supported in the United States and Puerto Rico where the emergency calling number is 911. More information: How emergency calling works in the voice channel

What are the applicable pricing scenarios for using the voice channel?

To understand the pricing calculation of various call scenarios, see Pricing scenarios for voice calling.

Why do my customers sometimes hear "Sorry! We couldn't serve you" when they call the contact center number?

Sometimes, when a Power Virtual Agents bot isn't added or an agent is unable to answer the call, your customers will hear the message that they couldn't be served. We recommend agents to refresh their presence regularly to ensure their availability to customers. If the problem persists, reconnect your Power Virtual Agents bot.

See also

Introduction to the voice channel
System requirements for Omnichannel for Customer Service
Supported cloud locations, languages, and locale codes

Frequently Asked Questions about Activities and the Timeline Wall

Article • 02/15/2022

Why can't I assign or delete an activity from the timeline?

If you use the **HideCustomActions** rule to hide buttons, such as **Assign** and **Delete** in the ribbon command bar definition, then those buttons that are present in the Timeline control will not work. The buttons in the command bar are the same as the buttons in the Timeline control; therefore, when a user selects the **Assign** or **Delete** button in the Timeline control, the following error message is displayed:

You do not have permission to perform this action. Please contact your system administrator.

To mitigate the issue, show the buttons in the command bar definitions.

Why do my users see different activities and records in My activities stream or other dashboard timelines?

The **My activities** stream in the dashboard shows the records and activities that are owned by a particular user. For example, user "A" sees records and activities that are owned by "A", and user "B" sees records and activities that are owned by "B".

Can I add activities to read only rows?

Yes. You can add activities to tables that are read only such as, notes, phone calls, tasks, and more.

Why I can't see other users activities and rows in the My activities stream in the dashboard?

My activities stream in the dashboard shows the rows and activities that are owned by you (user). For example, user **A** see rows and activities that are owned by **A**, and user **B**

see rows and activities that are owned by **B**.

See also

Set up timeline control

FAQs for timeline control

Add an appointment, email, phone call, note, or task activity to the timeline

FAQs about adding users to agent experience profile

Article • 04/05/2023

This article contains the frequently asked questions (FAQ) that you as an administrator might have when adding users to the custom agent experience profiles using the **Set as default** and **Set rank and roles** options in Customer Service admin center.

Can I set the profiles that are available out-of-the box as default profiles?

No. The **Set as default** and **Set rank and roles** options aren't applicable to profiles that are available out-of-the-box.

Can I create agent experience profiles, customize them and move between environments using solutions?

Yes. You can create and customize profiles in an environment, add them to a solution and then import them to other environments.

Why I can't I edit some of the custom agent experience profiles?

You can't edit profiles that are imported from a managed solution. You can edit only the agent experience profiles that are from an unmanaged solution. Profiles with the lock icon indicate that they're exported from managed solutions and aren't editable.

Can I assign the profiles available out-of-the-box to roles or set them as default?

No. The **Set as default** and **Set rank and roles** options aren't applicable to profiles that are available out-of-the-box.

Why do I see multiple profiles with the same rank?

You can't create multiple profiles with the same rank from the Customer Service admin center. However, if you've imported profiles created in different environments, you can have two or more profiles with the same rank. We recommend that you resolve the conflict from the source environments and then import the profiles.

Can I have multiple profiles marked as default?

No. You can't have multiple default custom profiles when you're setting the default profile in Customer Service admin center. However, if you've imported profiles created in different environments, you might see multiple default profiles. We recommend that you resolve the issue in the source environments and then import the profiles.

See also

Add users to agent experience profiles
Create and use agent experience profiles
Manage session template
Overview of Dynamics 365 Productivity Tools
Overview of channels in Omnichannel for Customer Service
Overview of agent experience profiles

FAQ about setting up Teams chat

Article • 08/04/2023

View answers to questions about setting up Teams chat in customer engagement apps.

How do I turn off Teams collaboration?

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. Set the toggle to **No** for **Turn on Microsoft Teams chats inside Dynamics 365**.

3. Save your changes.

How do I turn on Teams collaboration for specific apps?

1. In Dynamics 365, go to one of the apps, and then perform the following steps.

   Customer Service admin center

   a. In the site map, in **Agent experience**, select **Collaboration**.

   b. In **Embedded chat using Teams**, select **Manage**.

2. On the **Microsoft Teams collaboration and chat** page, turn on the toggle for **Turn on Microsoft Teams chats inside Dynamics 365**.

3. Select **Turn on for selected Dynamics 365 apps**, and then select the desired apps.

   ⓘ Note

If you're using Teams chat for the first time or previously enabled the setting, Customer Service workspace and Customer Service Hub are preselected and appear in the list of selected apps.

4. Save your changes.

See also

Configure Teams chat
Install and set up Microsoft Teams integration
Use Teams chat

Omnichannel for Customer Service on Unified Service Desk

Article • 05/19/2022 • 2 minutes to read

Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels. An additional license is required to access Omnichannel for Customer Service. For more information, see the Dynamics 365 Customer Service pricing overview and Dynamics 365 Customer Service pricing plan pages.

> **Note**
>
> The topic applies when you want to use Omnichannel for Customer Service with Unified Service Desk client application.

Overview

Unified Service Desk for Dynamics 365 Customer Service apps is a client application. You need to install the Unified Service Desk client application on every agent desktop to use Omnichannel for Customer Service.

Omnichannel for Customer Service is packaged as solution that you need to deploy on a Dynamics 365 Customer Service organization. Use the Microsoft Dynamics 365 Package Deployer to deploy the Omnichannel for Customer Service solution on a Dynamics 365 Customer Service organization.

Download Unified Service Desk client application

Download the Unified Service Desk client application.

> **Note**
>
> Only Unified Service Desk 4.1 or a higher version of client application is supported to use with Omnichannel for Customer Service.

Install Unified Service Desk client application

To learn how to install Unified Service Desk, see Install Unified Service Desk.

Make sure your computer meets all requirements before you install the Unified Service Desk client application. More information: Unified Service Desk system requirements

See also

Configure recommended settings for Unified Service Desk
Deploy Omnichannel for Customer Service package on Unified Service Desk
Configure agent and supervisor configurations in Unified Service Desk
Customize Customer summary form
Customize the conversation form
Configure notification (Screen pop) for agents

Unified Service Desk Guide

Article • 04/19/2023

Get started

- Unified Service Desk overview
- Unified Service Desk concepts
- Unified Service Desk system requirements
- Install, deploy, and upgrade
- Download Unified Service Desk

Configure

- Learn to use Unified Service Desk
- Configure your agent application
- Configuration walkthroughs
- Hosted control types, action, and event reference

Administer

- Manage access control
- Manage global options
- Configure client caching
- Configure auditing and diagnostics

Extend

- Integrate with external and web applications
- Use custom hosted control in Unified Service Desk
- Create custom listeners for auditing, diagnostics and traces
- Integrate with Citrix applications

Use (customer service agents)

- Connect to the server using the client application
- Use the Interactive service hub sample application package
- Use the Web Client sample application package
- Accessibility features

Troubleshoot and debug

- Configure client diagnostic logging
- Use the Debugger control
- Debug your custom code

Migrate

- Migrate to Customer Service workspace

Related apps & framework

- Customer Service Hub Help
- Omnichannel for Customer Service Guide

- Dynamics 365 Channel Integration Framework Guide

See also

Unified Service Desk Blog

Dynamics 365 Channel Integration Framework guide

Article • 03/17/2023

General

- Choose between Channel Integration Framework version 1.0 and 2.0
- Frequently asked questions

Version 1.0 documentation

Get started

- Dynamics 365 Channel Integration Framework overview
- Architecture overview
- System requirements

Download

- Get Dynamics 365 Channel Integration Framework
- Download sample code for softphone integration (version 1.0)

How to

- Configure a channel provider for your organization
- Build a simple communication widget
- Search and open records on an incoming conversation
- Enable outbound communication (ClickTOAct)
- Add a Dynamics 365 Channel Integration Framework solution as a dependent solution
- Authenticate channel users to the channel (widget)
- Pass Dynamics 365 URL to widget library

JavaScript API Reference

- Microsoft.CIFramework
- Client-side events
- Entity reference

Version 2.0 documentation

Get started

- Dynamics 365 Channel Integration Framework overview
- Architecture overview
- System requirements

Download

- Get Dynamics 365 Channel Integration Framework
- Download sample code for softphone integration (version 2.0)

How to

- Configure channel provider using app profile manager
- Enable outbound communication (ClickTOAct)
- Add a Dynamics 365 Channel Integration Framework solution as a dependent solution
- Authenticate channel users to the channel (widget)
- Pass Dynamics 365 URL to widget library
- Manage session templates
- Manage application tab templates
- Manage notification templates
- Associate templates with scenarios
- Channel Analytics
- Support for multiple providers

JavaScript API Reference

- Microsoft.CIFramework
- Client-side events
- Entity reference

Related apps & framework

Customer Service Hub Help

Omnichannel for Customer Service Guide

Unified Service Desk Guide

Customer Service Insights

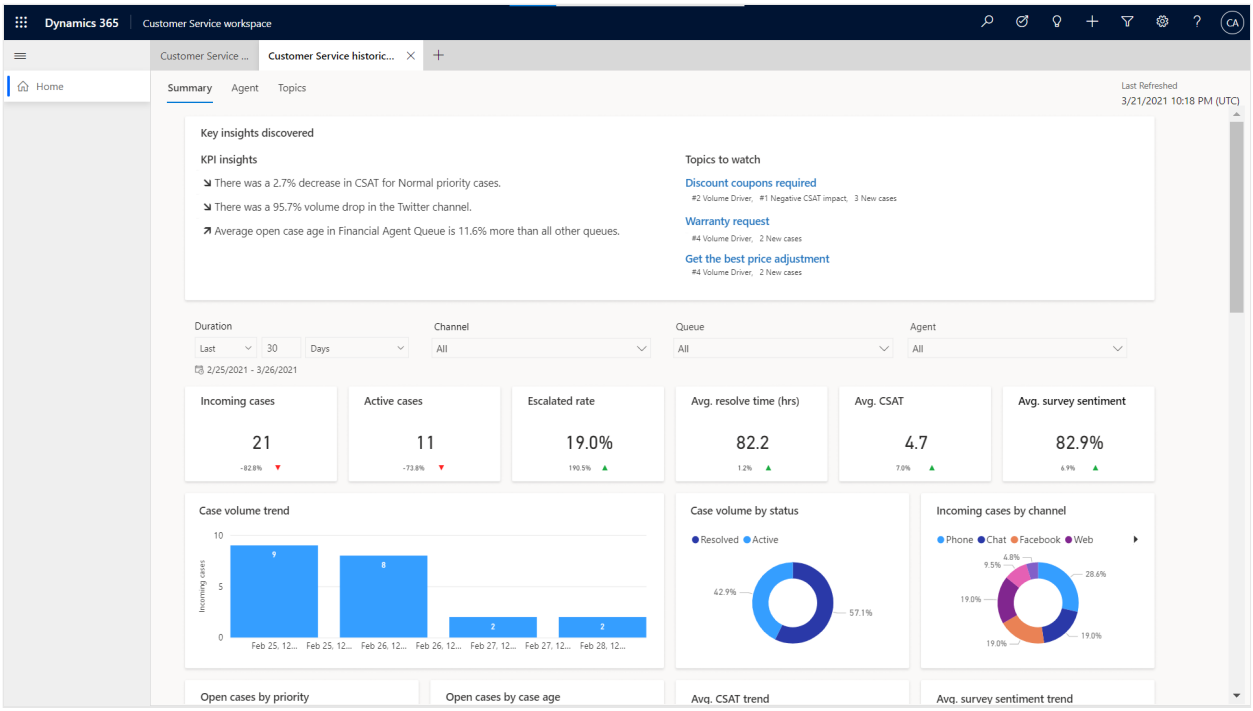
Article • 11/01/2023

> **Note**
>
> Microsoft Power BI template reports for **Customer Service Analytics dashboards** and **Omnichannel Insights** will be deprecated as of November 6, 2023. We recommend that you start using the out-of-box **Omnichannel historical analytics** and **Customer Service historical analytics**, which don't need additional Microsoft Power BI licenses. You can **visually customize** and extend these reports to add additional data sources and metrics through **data model customization**. For details on the deprecation, go to **Deprecations in Customer Service**.

Dynamics 365 Customer Service Insights helps both agents and customer service managers make better decisions and improve customer satisfaction. Agents and customer service managers can use AI and analytics capabilities for Customer Service Insights and Omnichannel for Customer Service. You can empower your teams with insights into customer satisfaction–boosting analytics and AI-powered features to spend less time searching and more time engaging with customers.

The premium AI capabilities in Customer Service Insights use advanced AI technology in natural language understanding and natural language generation to help your service team focus on what matters and guide them to success. As an agent, you can use real-time similar cases and knowledge article suggestions that are customized for the current context. The AI-driven technology allows agents to help solve customer issues more quickly, improving resolution rates, and customer satisfaction.

These capabilities are deeply embedded into the core agent and manager experiences in Customer Service and Omnichannel.



Customer Service Insights across your organization

Customer Service Insights connects with your Dynamics 365 Customer Service and Omnichannel for Customer Service data to provide your support organization with out-of-box AI and BI capabilities, such as customer service analytics, similar case suggestions and more. Different applications will surface slightly different feature sets, as detailed below.

Customer Service applications

Customer Service Insights is now embedded in Dynamics 365 Customer Service. After it is enabled, this experience allows you to start seeing historical analytics directly within the Customer Service environment. Several reports and dashboards can be viewed by your management team.

For more information on the Customer Service offerings, see the following capabilities.

- Customer Service Historical analytics
- Topic clustering for cases
- Customer Service analytics in Power BI
- Knowledge search analytics
- AI Suggestions for similar cases and knowledge articles

Omnichannel for Customer Service

Customer Service Insights for Omnichannel for Customer Service brings many of the same key operational metrics and features right into your daily contact center operations. Real-time customer sentiment analysis, combined with contextual AI suggestions of relevant cases and knowledge articles, helps agents reduce customer frustration and case resolution times. With the sentiment analysis dashboard, you can use the real-time sentiment data to gain a better understanding of how customer interactions drive KPIs and satisfaction scores.

For more information on the Omnichannel for Customer Service offerings, see the following topics.

- Analyze real-time customer sentiment
- Enable AI suggestions for similar cases and knowledge articles
- Dashboards overview

Important

If you're a customer who uses the Customer Service Insights standalone web application, your current working environments will be terminated and inaccessible by December 8, 2021. You can no longer use the standalone service after this date. The embedded Customer Service Insights features in the core applications will continue to be available and supported. For users who hold Customer Service Enterprise licenses, you can no longer create new workspaces, but you'll retain access to existing ones. Meanwhile, the standalone app guide contains documentation for the web application.

See also

Configure Customer Service analytics and insights
Configure Customer Service Analytics dashboards in Power BI
Send a survey automatically when case is resolved
Configure Omnichannel historical analytics
Configure AI topic clustering for conversation