User Manual

Contents

Introduction

WhatsApp4Dynamics is a solution that integrates the popular messaging application WhatsApp with Microsoft Dynamics 365 CRM platform.

It serves as a bridge between WhatsApp Business Account and Dynamics 365, enabling users to utilize WhatsApp's messaging capabilities within the Dynamics 365 environment.

- Send and receive messages and notifications directly from within the Dynamics 365 interface.
- With this integration streamline communication process and enhance customer engagement.
- Leverage automation capabilities, allowing users to set up trigger messages based on specific events, such as sending automated WhatsApp messages on CRM actions.
- It also integrates CRM data with WhatsApp Business Account, providing users with access to customer information and context-rich conversations.

Ultimately, WhatsApp4Dynamics offers Dynamics users an enhanced communication and engagement tool to leverage the power of WhatsApp within their CRM workflows.

Salient Features:
  i. Enables sending and receiving WhatsApp messages directly from within Microsoft Dynamics.
 ii. Provides prompt notifications and updates from WhatsApp Business Account on CRM, keeping users informed.
iii. Maintains a history of WhatsApp conversations within Microsoft Dynamics 365 CRM, providing communication records.
 iv. Integrate WhatsApp Business Account within Microsoft Dynamics 365 CRM to send automated messages based on CRM actions.
  v. Leverage WhatsApp4Dynamics for customer engagement, such as sending notifications, updates, or marketing messages from Microsoft Dynamics 365 CRM.
 vi. You can create leads, contact, account, any other OOB or custom entity from WhatsApp conversations.
vii. Customize the message templates approved by Twilio as per your need, including Dynamic fields of the CRM and send a message.
viii. Access WhatsApp chat interface from within the CRM records to have a seamless and integrated approach to customer communication, which can lead to improved customer service and relationship management.

Available for: Microsoft Dynamics 365 v9.1 and above, Dataverse.

Deployment: Online.

Security Roles

The next step is to assign security roles to users.

WhatsApp4Dynamics has the following security roles:

The user with **WhatsApp4Dynamics Administrator** security role is in charge of setting up of the solution. They can setup the Twilio Account by using WhatsApp Business Account and integrate it with Dynamics 365 CRM, Create Configurations, Record Types, Customize Templates, etc.

The user with **WhatsApp4Dynamics User** security role can only chat with the customer and convert the chat into lead, opportunity, etc.

Note:

- It is necessary to assign any one of the above security roles to use WhatsApp4Dynamics solution.
- System Administrator has all the rights that WhatsApp4Dynamics administrator has.
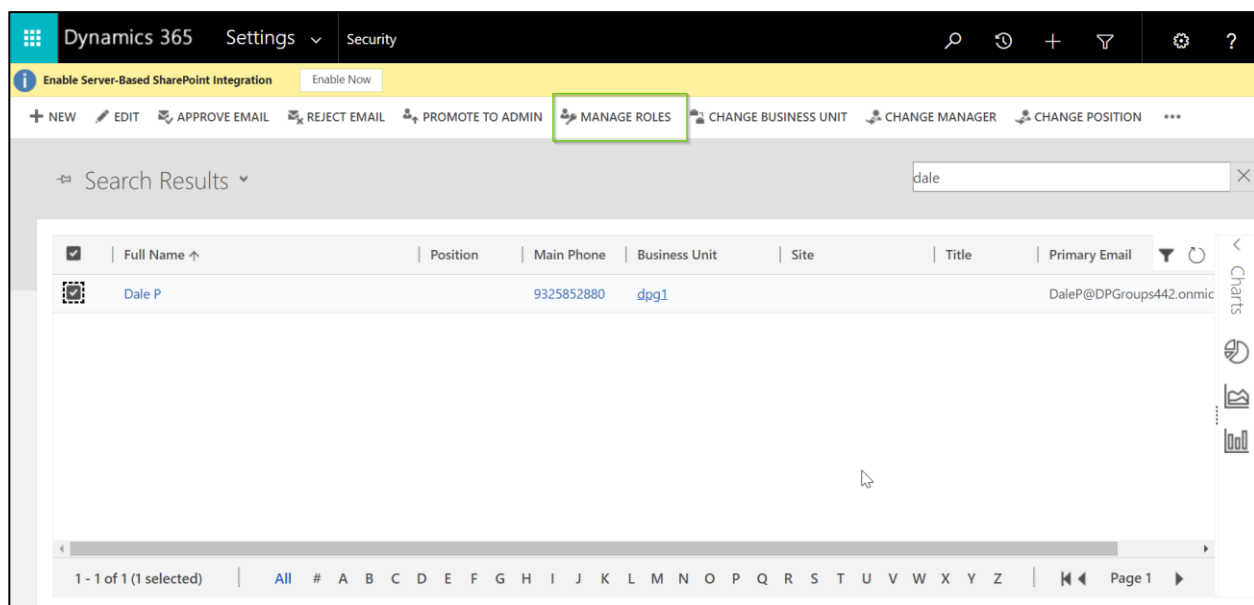
Here are the steps to assign security roles to CRM users.

- Go to Advanced **Settings** --> **Settings** --> **Security**.
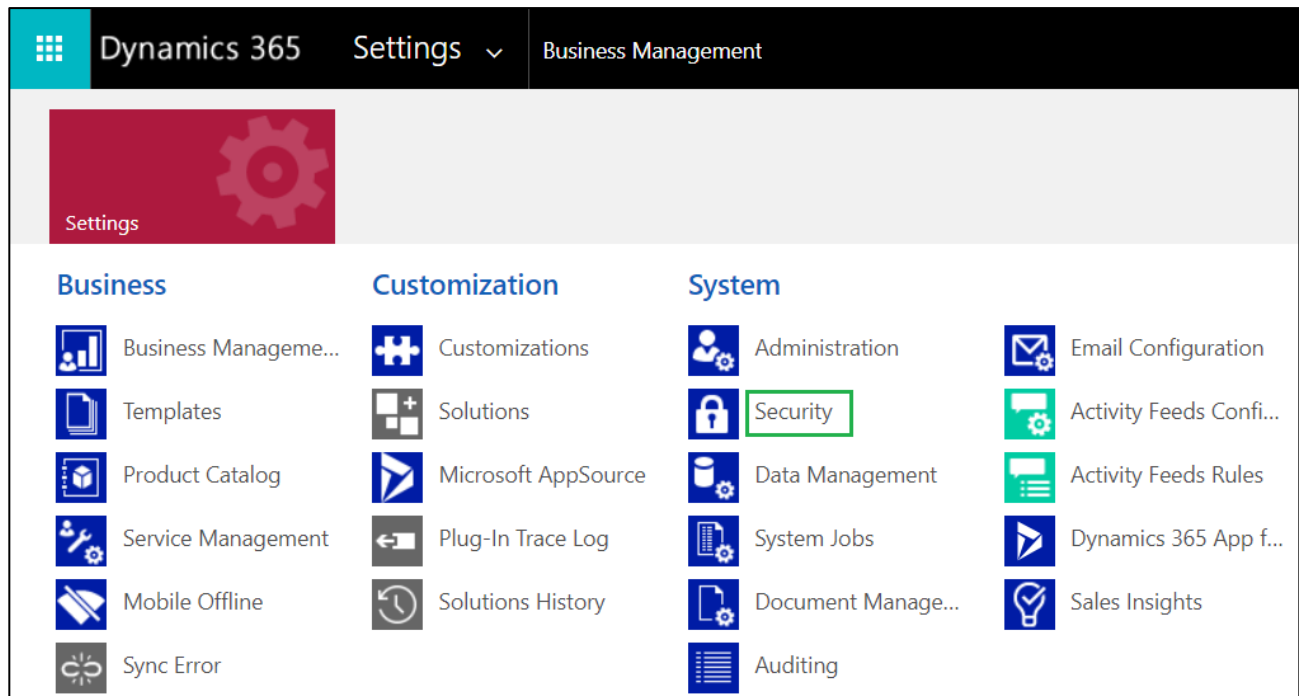
- Select **Users.**
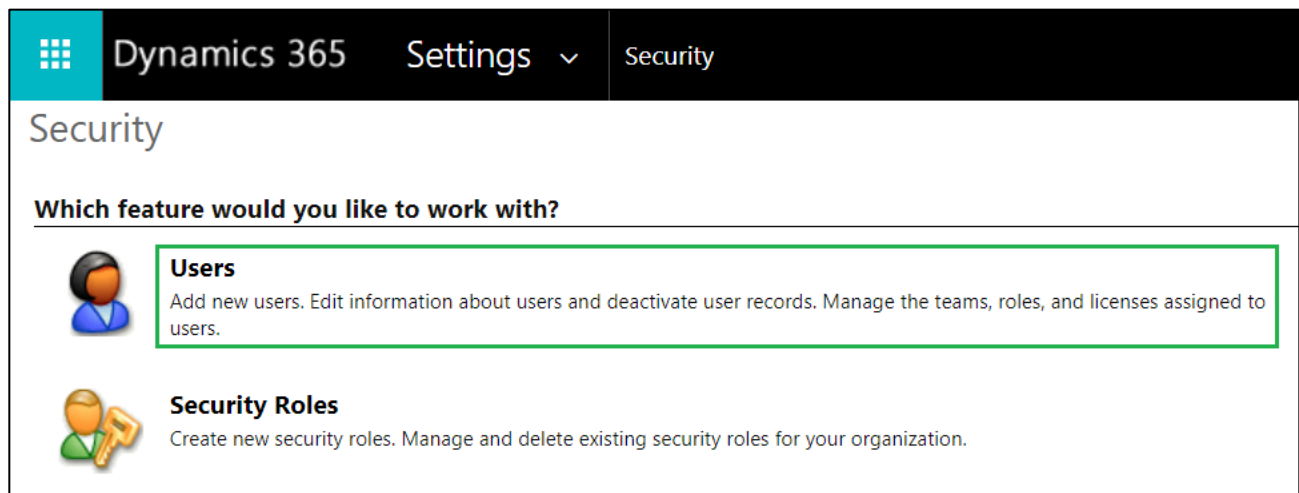
- Select user --> Click on **Manage Roles**

- Click on any one of the WhatsApp4Dynamics security roles --> Click **OK.**

Configuration

Configuring WhatsApp4Dynamics

Configuring WhatsApp4Dynamics is a straightforward process that involves setting up the integration between WhatsApp Business Account and Microsoft Dynamics 365.

Below is a step-by-step guide to help you with the configuration:
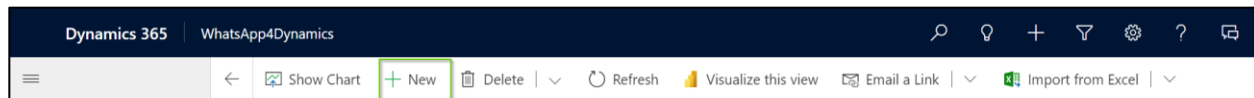
- Click **+New** to add a New Configuration.
- In General Tab, add the details such as Mobile Number, Description, etc.
- This section requires you to add Twilio Account SID and Auth Token, which will allow the CRM to communicate with the Twilio platform. You can obtain them by creating a Twilio account.
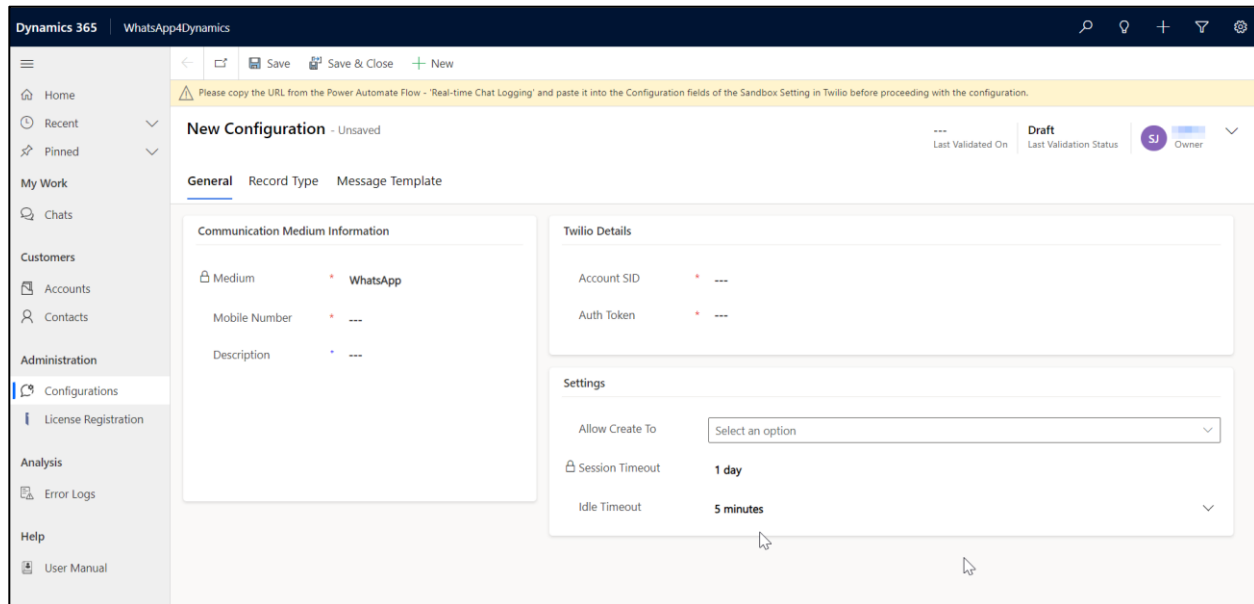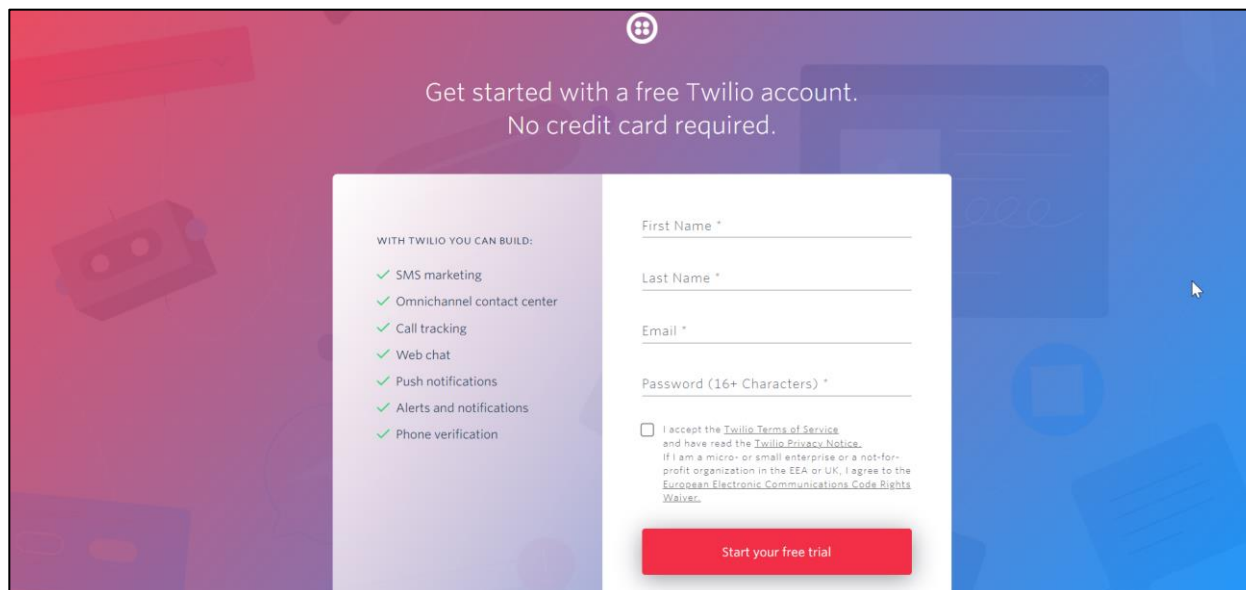
Please Note:
- While configuring, in background, we have a field to create logic. Due to this, it is extremely important that System Admins give privileges to the users.
- For testing purpose you can create a Twilio Sandbox Account, as explained further.

Create A Twilio Account (Sandbox)

WhatsApp4Dynamics leverages Twilio's WhatsApp API to enable seamless communication within the Microsoft Dynamics 365 environment. By integrating Twilio's API, WhatsApp4Dynamics allows users to send and receive WhatsApp messages directly from their Dynamics 365 interface.
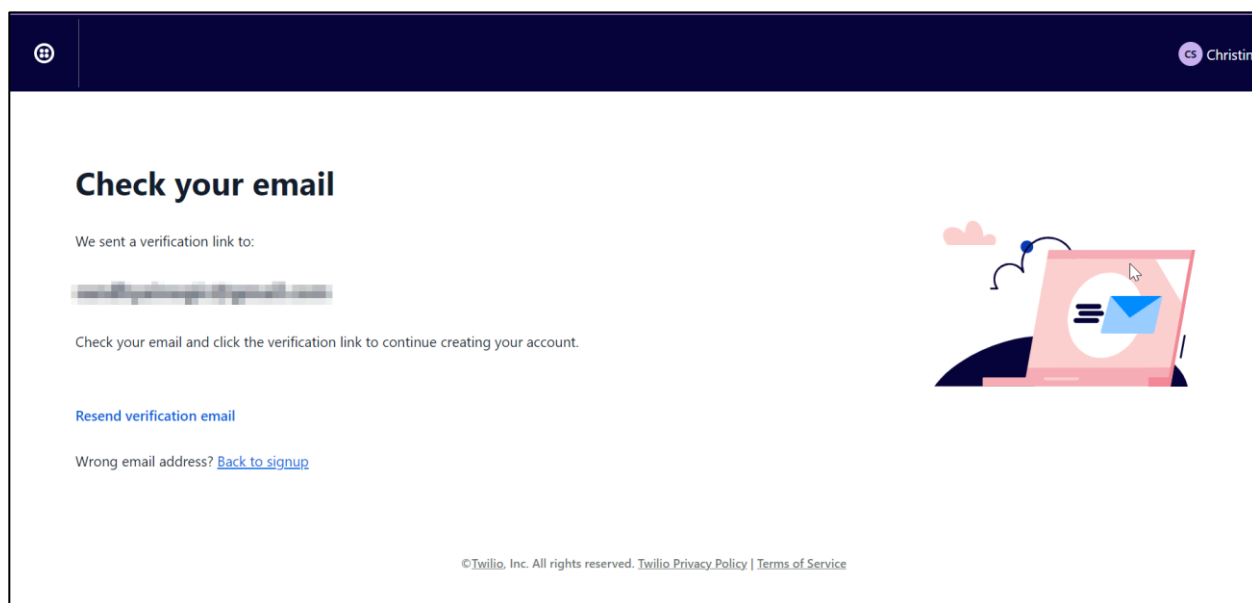
Let's take a look at how to get started with Twilio:

- Sign up on https://www.twilio.com/try-twilio
- Add your **First Name, Second Name, Email Address and Password**.
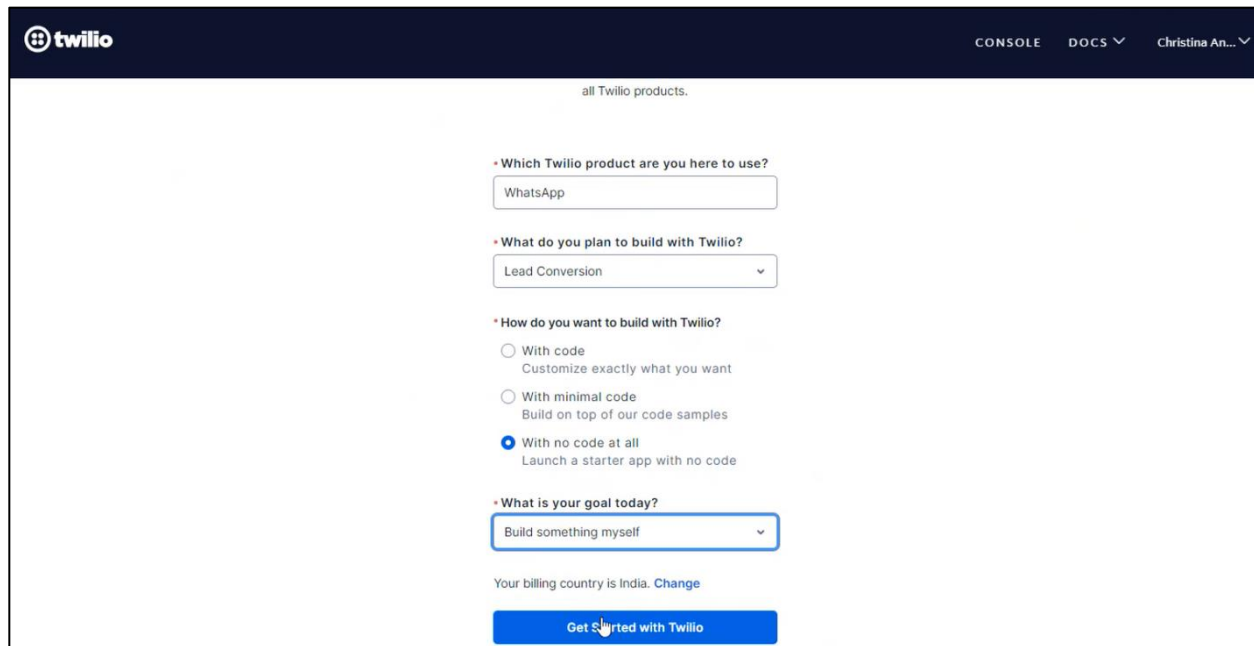- You will then be sent a verification email.

- Once verified, you need to add your phone number to setup your Twilio account and validate the same.

Please Note: During signup, the phone number provided is only for setup and verification. This number need not be similar to your **WhatsApp Business Account number / Sender Number** that you will use to communicate with your clients, and is only for setup.

After the Twilio Verification Process is completed, then you need to mention which product you would like to access with the help of Twilio.

- Add "**WhatsApp"**, when asked which Twilio product are you here to use.
- We have added "**Lead Conversion"**, when asked what do you plan to build with Twilio. You may choose any other segment as your business preference.
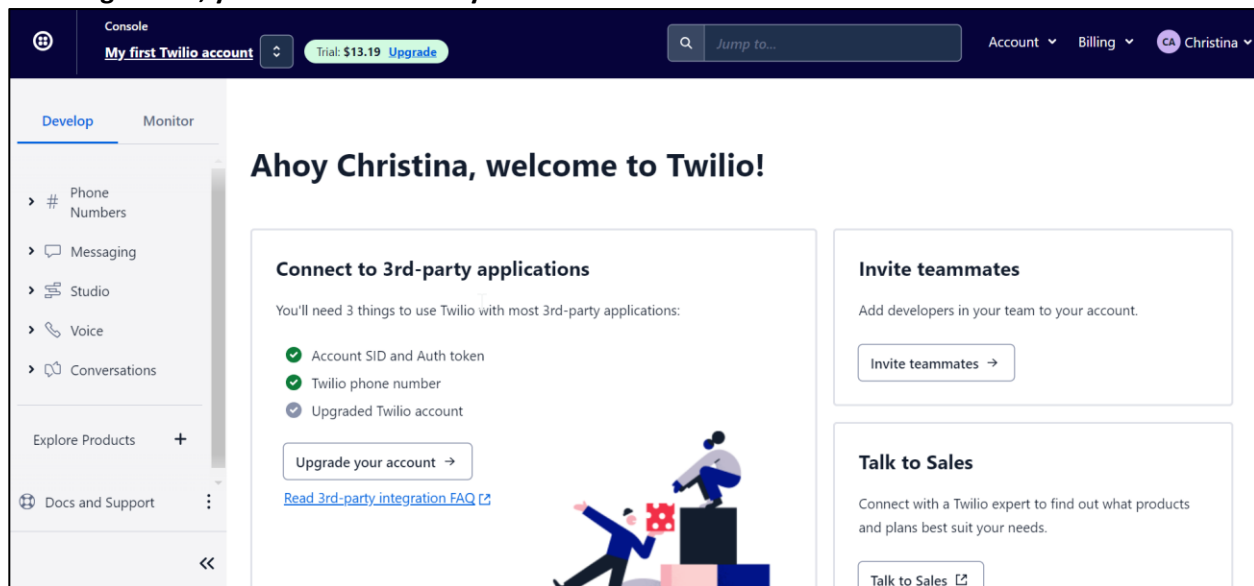
- Select, **"With no code at all"**
- And in the last section, select **"Build something myself"**
- And click **"Get started with Twilio"**

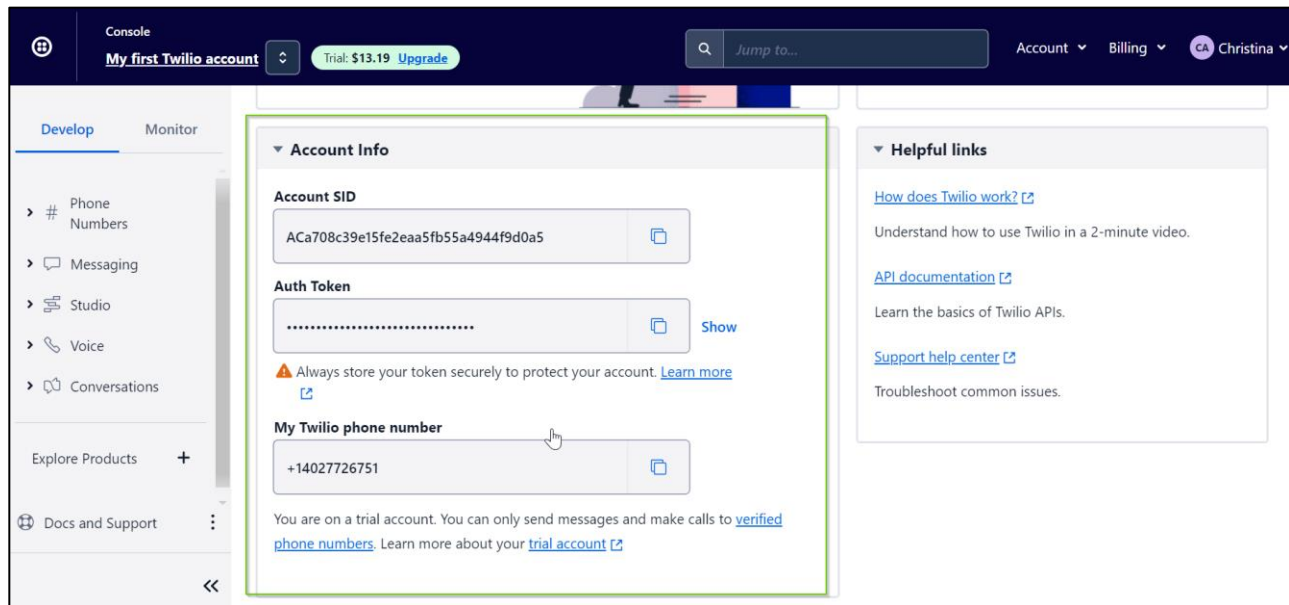**Once registered, you'll have access to your Twilio dashboard.**

Get your Twilio Account SID" and "Auth Token: In the Twilio dashboard, go to "Account Info" and take note of the "Account SID" and "Auth Token."

- **Install and configure the integration:** Follow the instructions provided by the integration solution to set up the connection with Twilio's API. This typically involves entering your Twilio Account SID and Auth Token, which will allow the CRM to communicate with the Twilio platform.
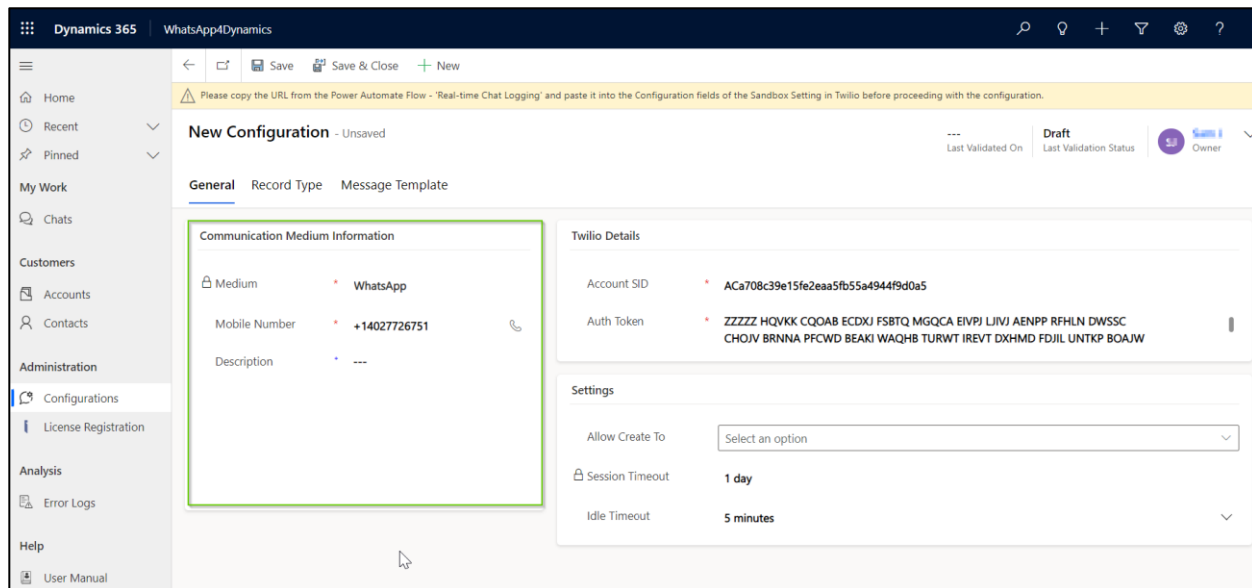
In Twilio Configuration Details
- The Account SID,
- Auth Token (Once user adds this in normal text, it will be automatically encrypted)

Once Account Info is added, update the General Setting:

- **Allow Create To -** In this section you can enable multiple entities such as Account, Lead, Contact, any OOB or Custom Entities. These entities will be available on **Chat Record** button in the Chat UI and you can easily create any OOB or custom entity record from it**.**
- **Session Timeout –** This specifies how long will a WhatsApp session be active (This is by default for 24 hours / 1 day).
- **Idle Timeout -** By default, chat notifications are only visible to the owner of the chat session. But the chat notification becomes visible to all users, if there is no activity for the specified minutes in this field.
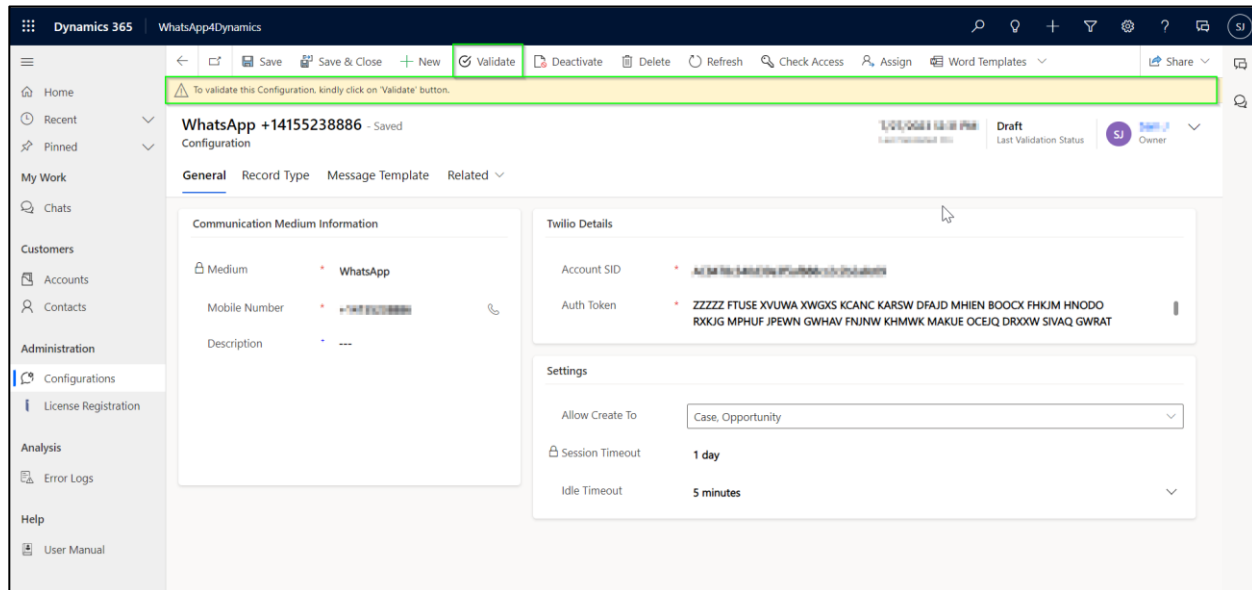

Validate Configuration

Validate the configuration in WhatsApp4Dynamics after adding the Account SID and Authentication Token

from the Twilio account. Validating the configuration helps ensure that the integration between WhatsApp4Dynamics and Twilio is set up correctly and functioning as expected.

Once the Configuration is done it will be saved as Draft and you will have to validate the Configuration.

- Click **Validate**. The Account SID & Authentication Token added from the Twilio Account will be validated by Dynamics 365 CRM. You will receive a notification for the same.
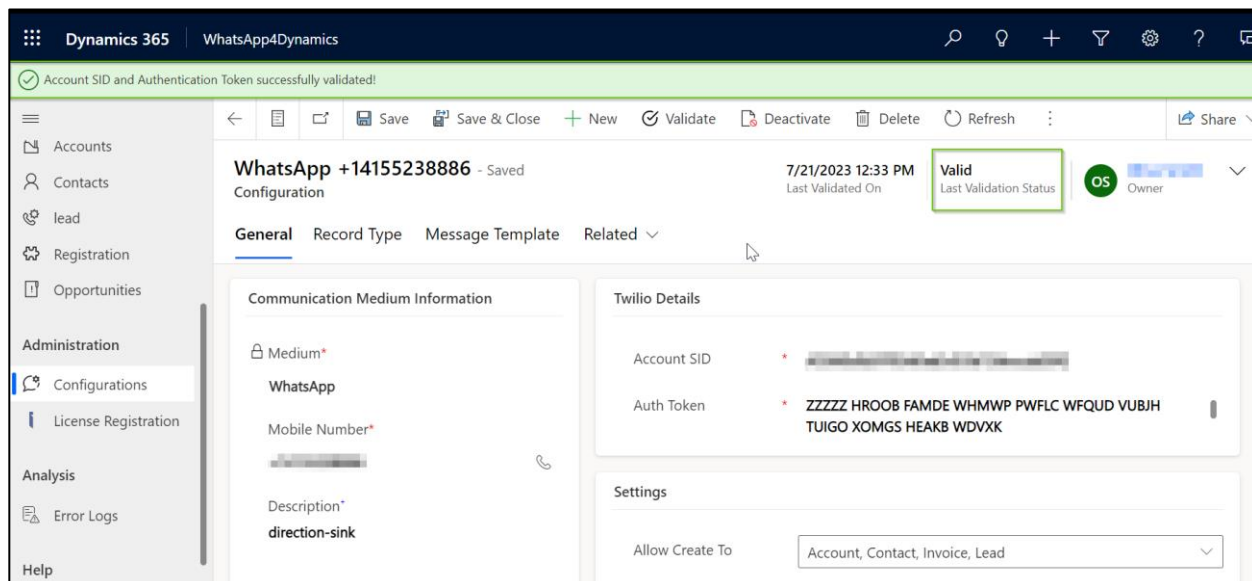
Copy URL from Power Automate Flow

Before proceeding with the Configuration, you need to copy the URL of Power Automate Flow – "**Real-Time Chat Logging**" which is shipped in our solution and paste it into the Configuration field of Sandbox Setting in Twilio.

Please Note: If this step is not performed, you will not be able to receive any messages on the CRM.

- Go to Power Automate in Dynamics 365

- Choose the environment in which the **Solution** is imported.
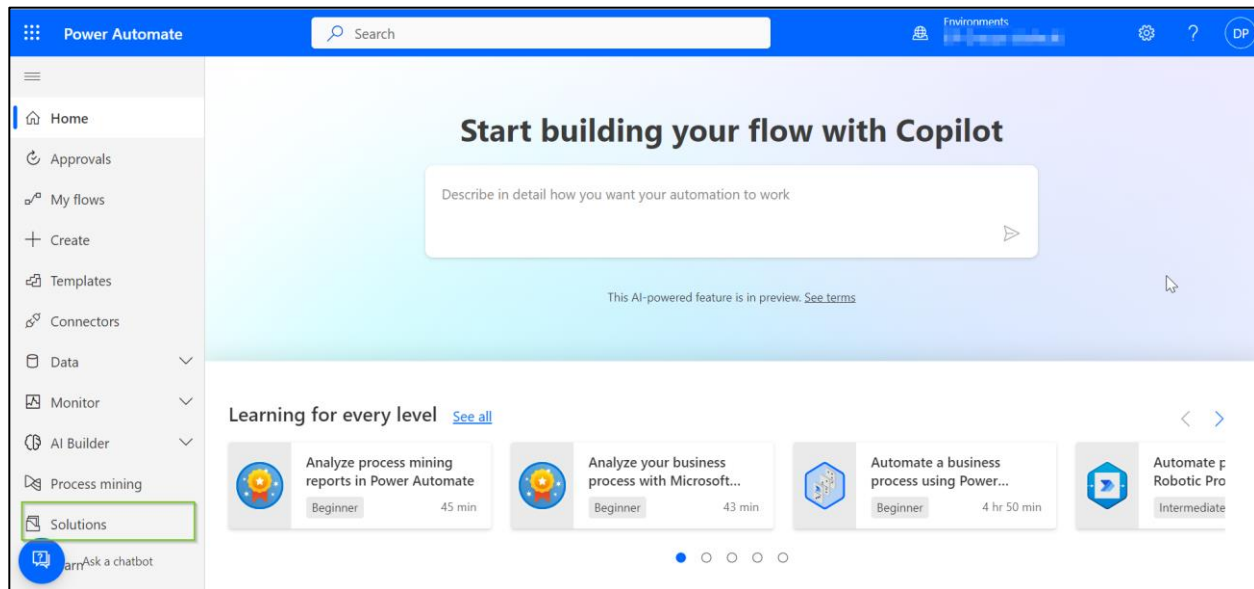
- In the list of **Solutions,** click **WhatsApp4Dynamics.**
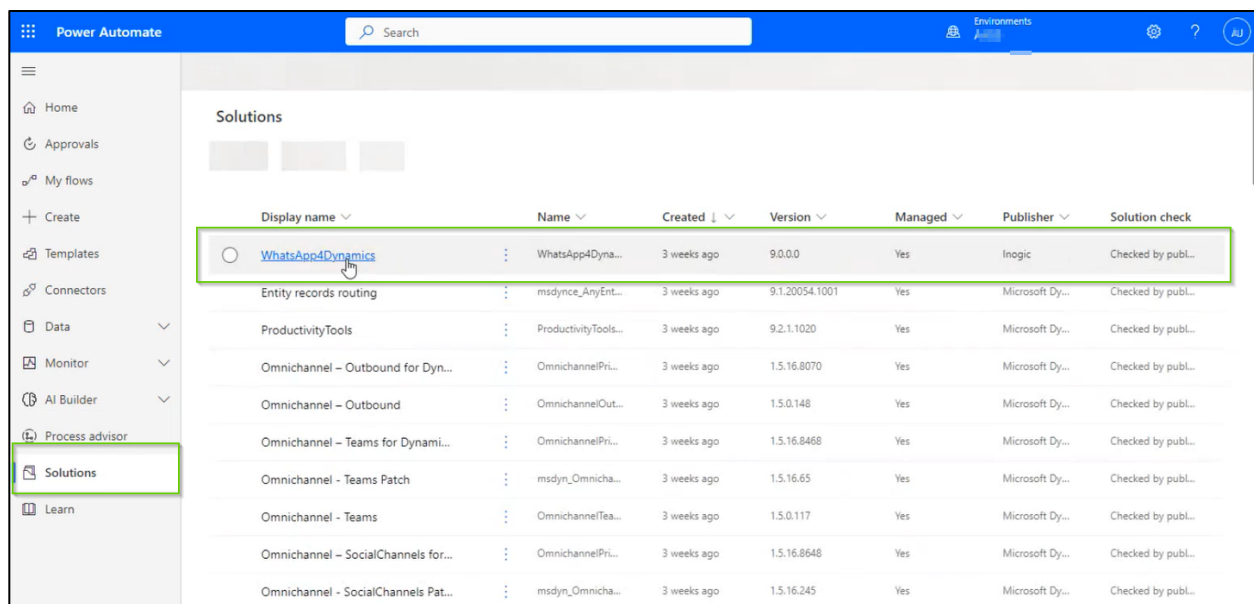
- WhatsApp4Dynamics Solution will open, then navigate to **Cloud Flows** and click **Real-time Chat Logging**.
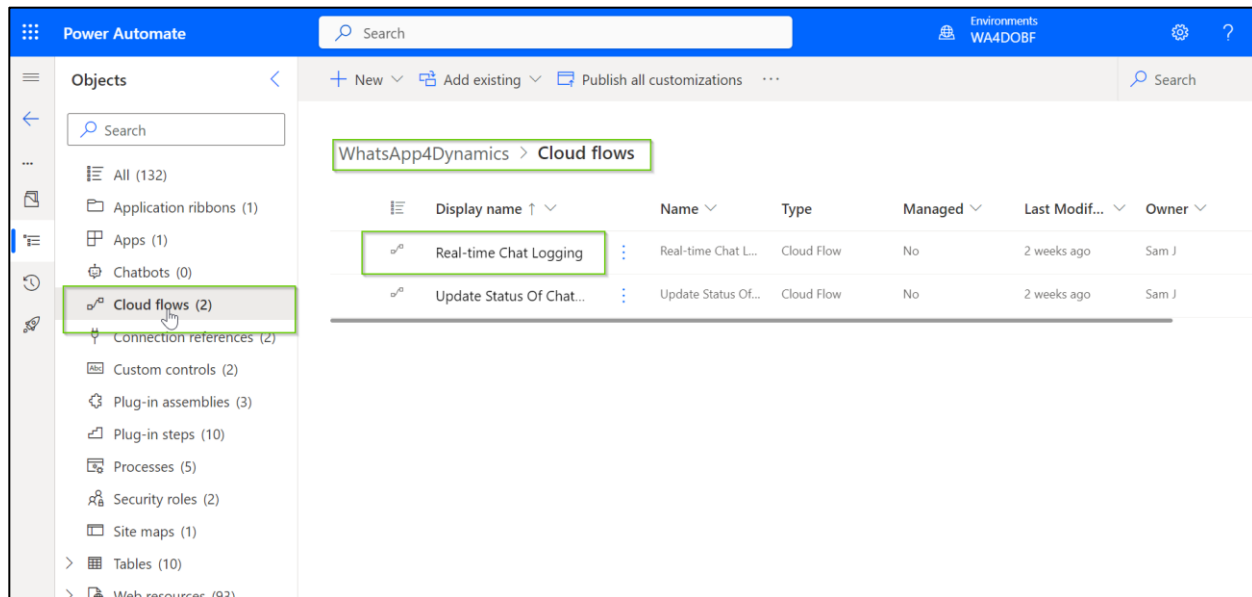
- Click on the **Edit button** inside **Real-time Chat Logging** in **My Flows**
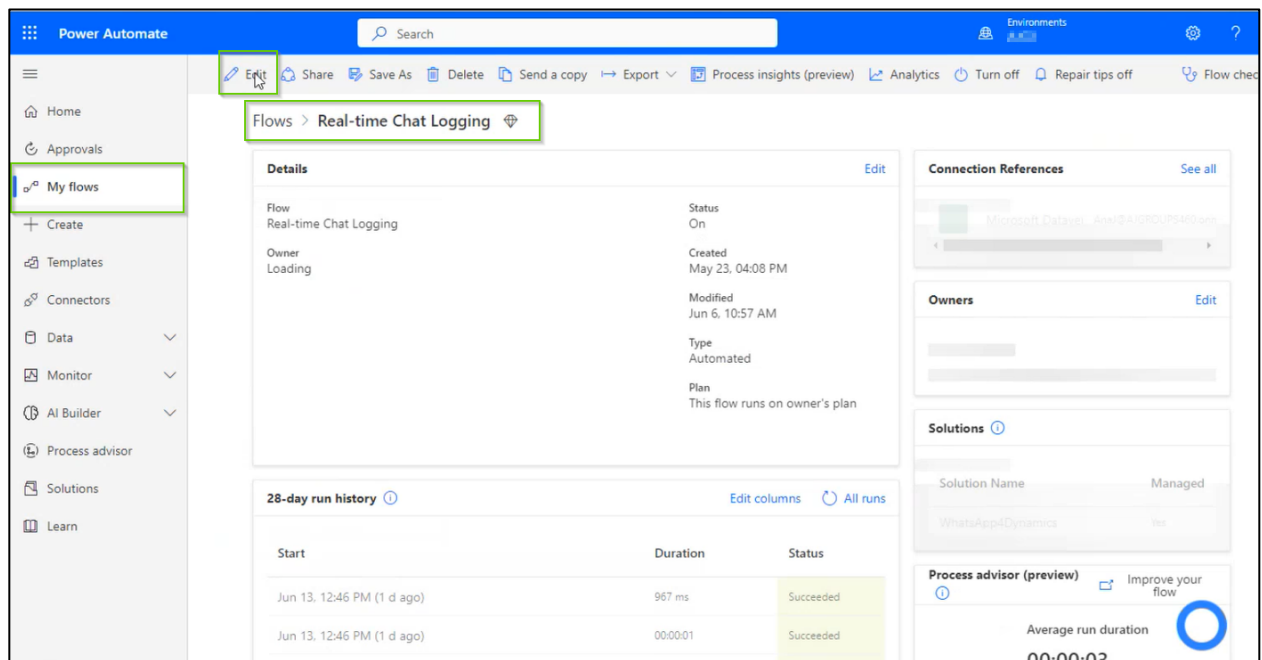
- Copy the **HTTP POST URL**
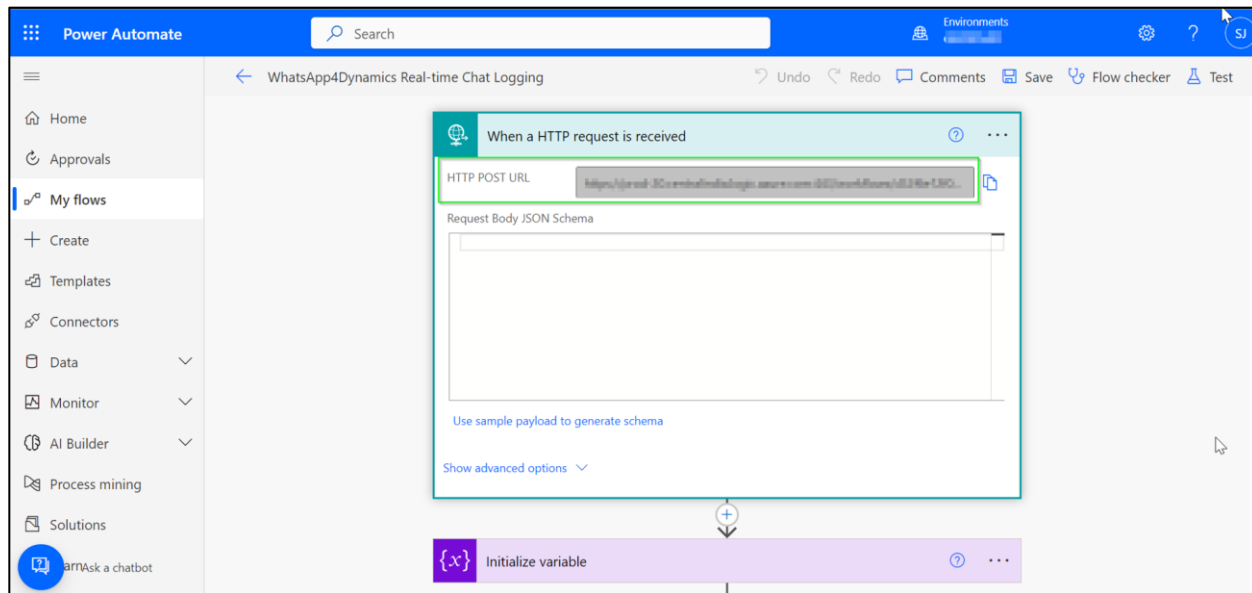
- Paste this **HTTP POST URL** in the **Sandbox Configuration** section to send and receive messages from the Sandbox to your Application.
- The same URL will be pasted on the **"When a message comes in"** section as well as the **"Status callback URL".** Both the **Method** dropdown tab should be **POST.**
- Click **Save** to save the URLs pasted.
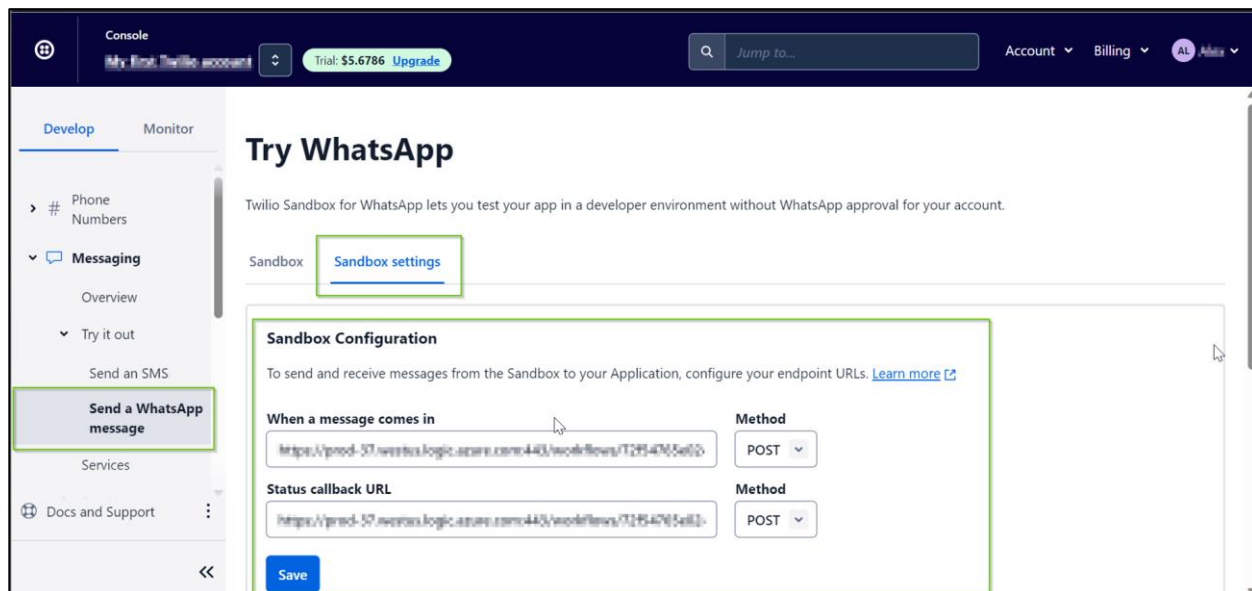
Configuring Record Type

Users need to configure **Record Types** for all those entities with whom they want to chat. Also, at times a record can have **multiple phone numbers**. WhatsApp messages will be sent to the phone numbers selected in the '**Phone Number Field'**.

Please Note:
- Against one Entity, only one Record Type can be created.
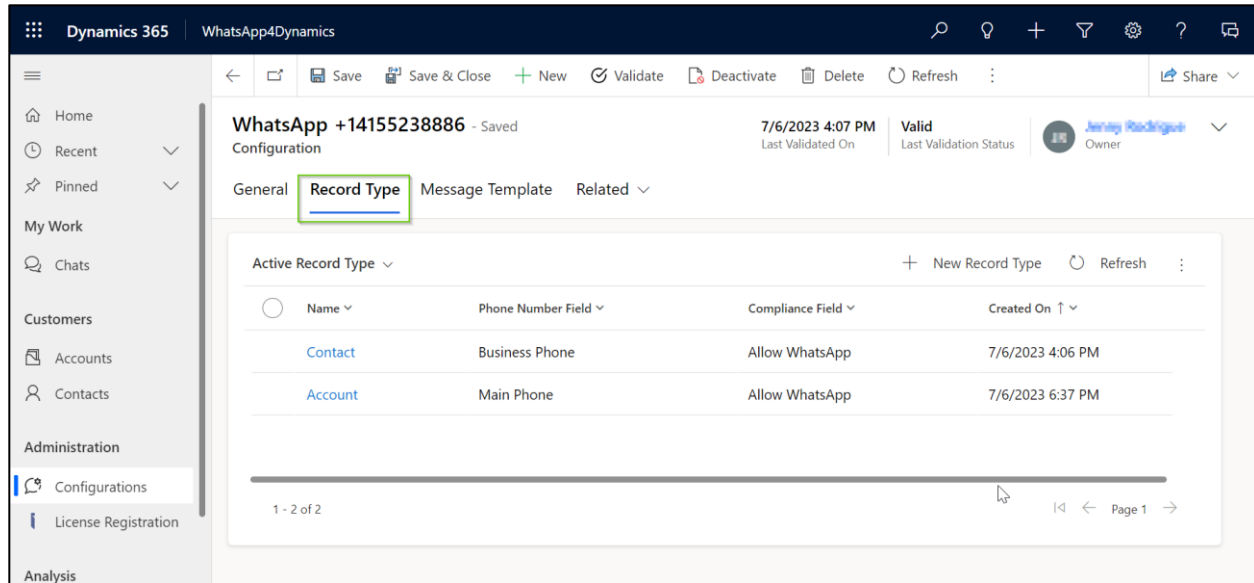
- Click on **+New Record Type** to create New Record.
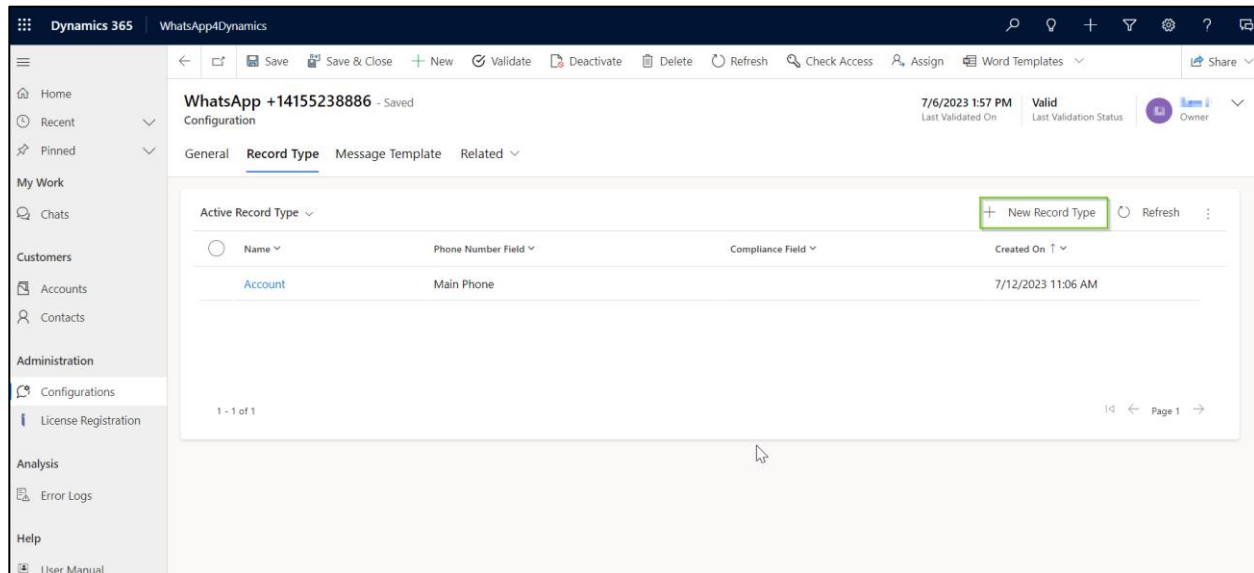
- Mention the **Record Type**
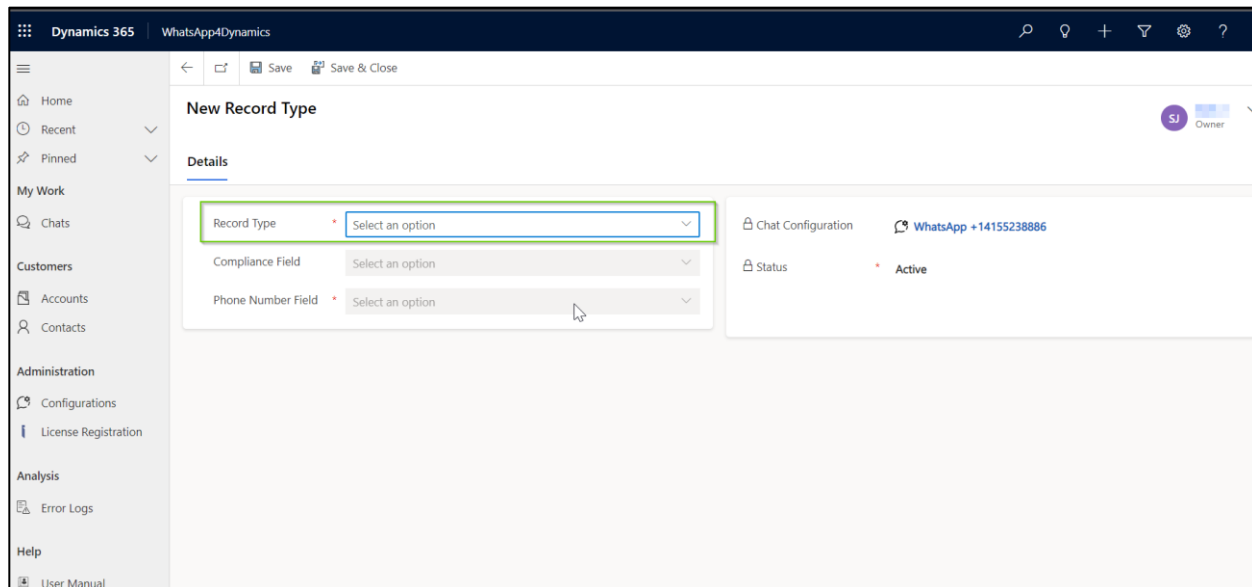
- You can choose any Entity from OOB to Custom ones. However, this is only functional on Entities that have a phone number associated with them.
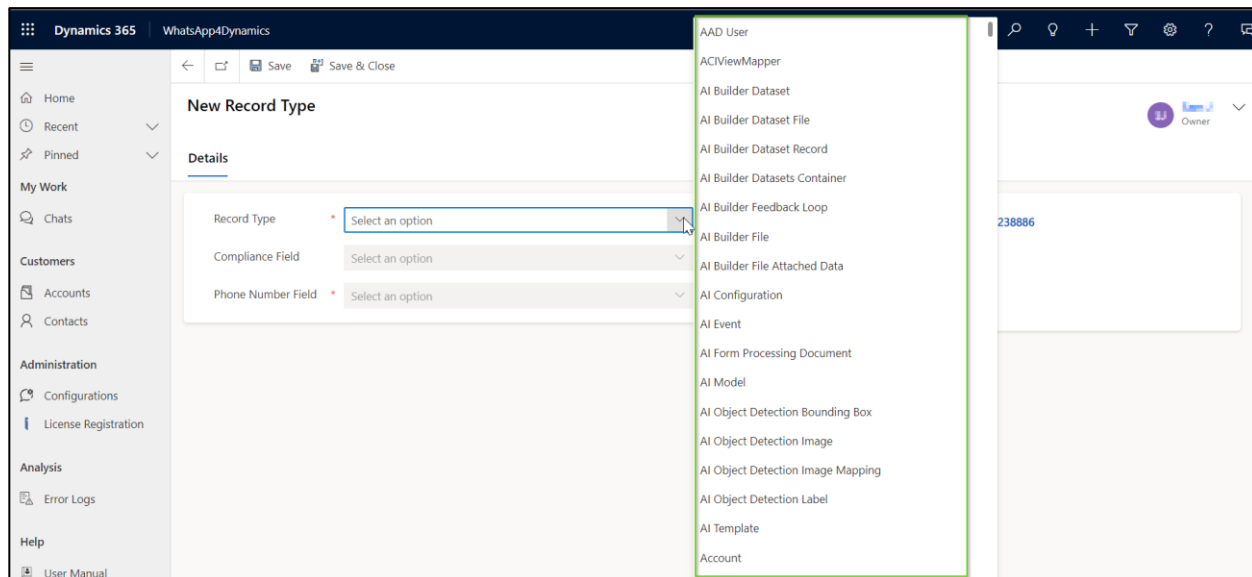
- For the system to decide, whether the message should be sent, the message **Compliance Field** is used.
- The **Compliance Field** lists all the Boolean Fields within the **Record**.
    - o   If the value is selected as **Yes,** WhatsApp messages will be sent.
    - o   If the value is selected as **No, W**hatsApp messages will not be sent.

Please Note: In case Compliance Field is not set, the message will be directly sent without validation.
In the below screenshot, we have selected **'Allow WhatsApp'**, you may select a field as per your preference.
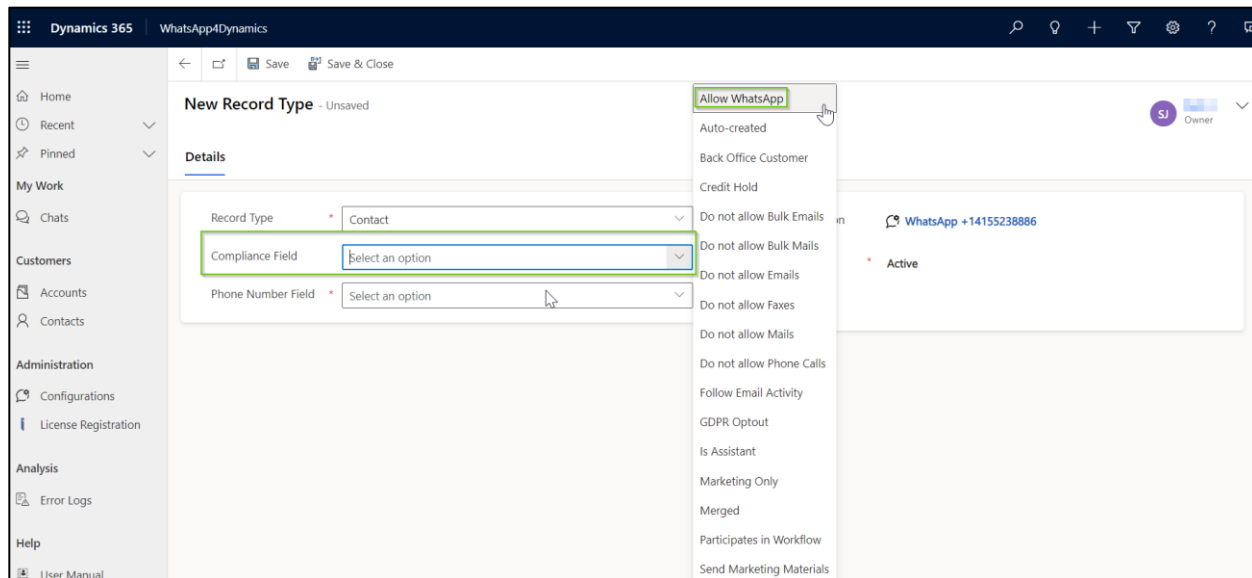
- In the **Phone Number Field**, all the multiple phone number fields within a Record are listed and you can choose whichever contact as preferred. But, please note that the particular field selected should have a working contact number.

Please Note: It is extremely important for the selected contact numbers to have **Country Codes**.
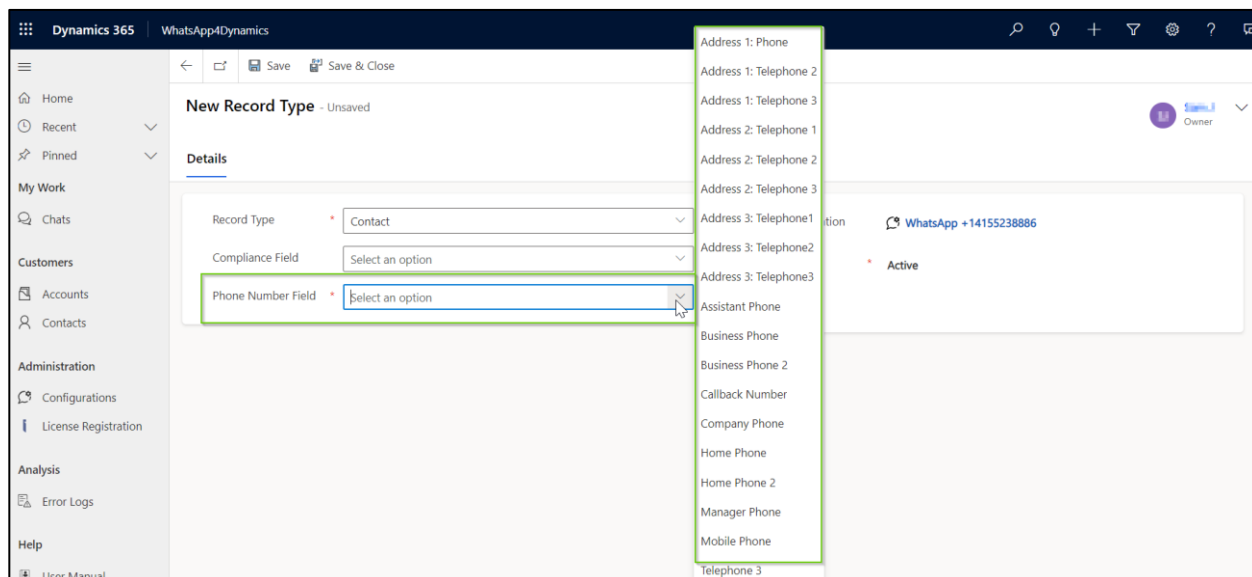
Configuring Message Templates

Configuring message templates in WhatsApp4Dynamics allows users to set up predefined message formats for commonly used responses or communication scenarios.

These templates can then be easily accessed and used when sending messages through WhatsApp from within the Dynamics environment. However, these templates need to be pre-approved by Twilio & configured beforehand.

Please Note: Although, you can only initiate a conversation by sending a message template. You have the choice to send freeform messages when a customer initiates a conversation or replies on a sent template.

To configure WhatsApp message templates in Microsoft Dynamics 365 CRM using Twilio, you can follow these steps:

1. **Login** to your **Twilio Account**, navigate to **Try it out** and then click on **Send a WhatsApp message**.
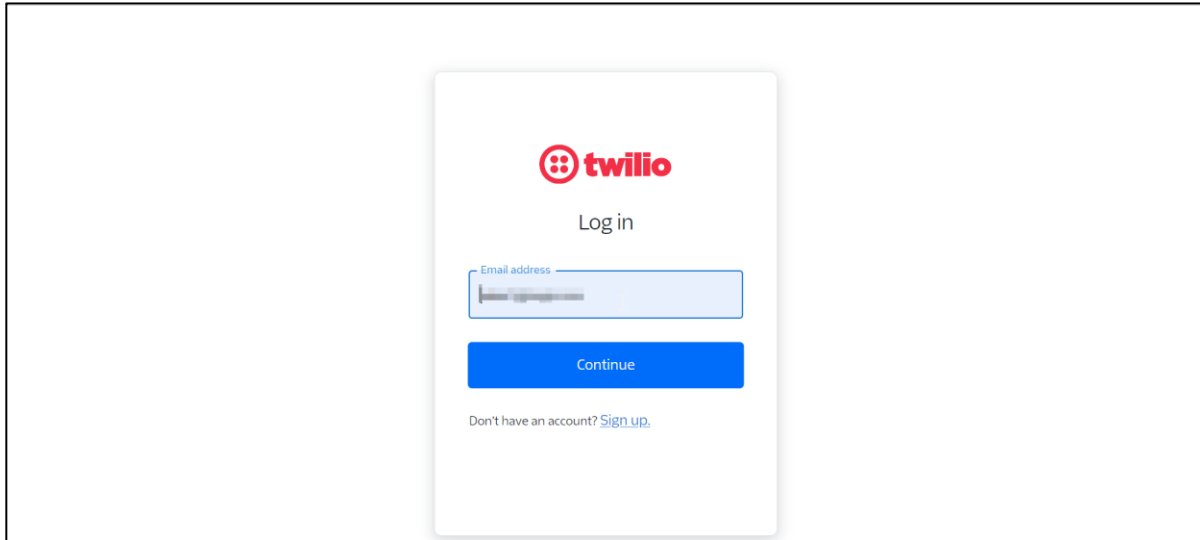
2. **Business-Initiated Messages:**

Once you have established a connection with **Twilio WhatsApp Sandbox,** you can customize the default templates under, **Business-Initiated Messages.** There are multiple **Twilio** message templates that you can choose.

Please Note: Twilio (Sandbox) limits you to default message templates. Twilio templates can be used on WhatsApp4Dynamics within Microsoft Dynamics 365 CRM.
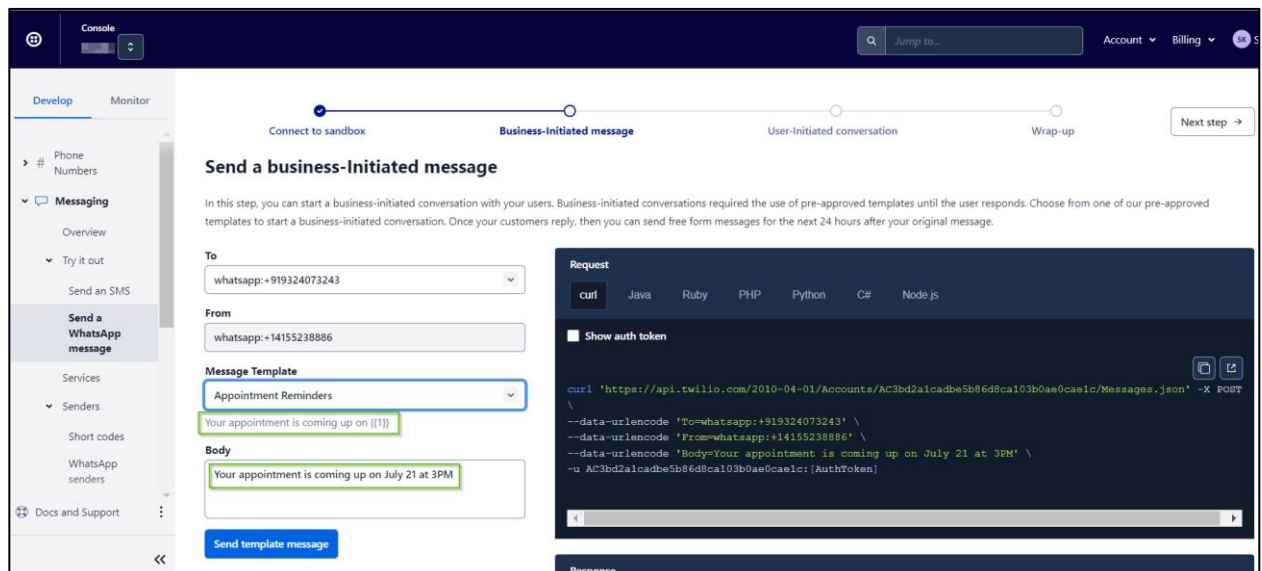
For Example: The **Appointment Reminders** template says *"Your appointment is coming up on {{1}}"* In the

curly brackets users can add dynamic values or CRM fields as values, while creating templates. However, the template cannot be changed.

Another Example: The **Order Notification** template that says *"Your {{1}} order of {{2}} has shipped and should be delivered on {{3}}. Details: {{4}}"* Similarly to the above example, in the curly brackets users can add dynamic values or CRM fields as values.

For more information, you can refer the Twilio documentation here.

3. **Create Messages Templates in Microsoft Dynamics 365 CRM:**

You can now create WhatsApp message templates on Microsoft Dynamics 365 CRM after you have done the setup and are ready to copy templates from your Twilio Account.
To do so, follow the steps;

- In **WhatsApp4Dynamics** click **Configurations**, navigate to **Message Templates**.
- Click **+New Message Template** to **create a new WhatsApp Message Template**
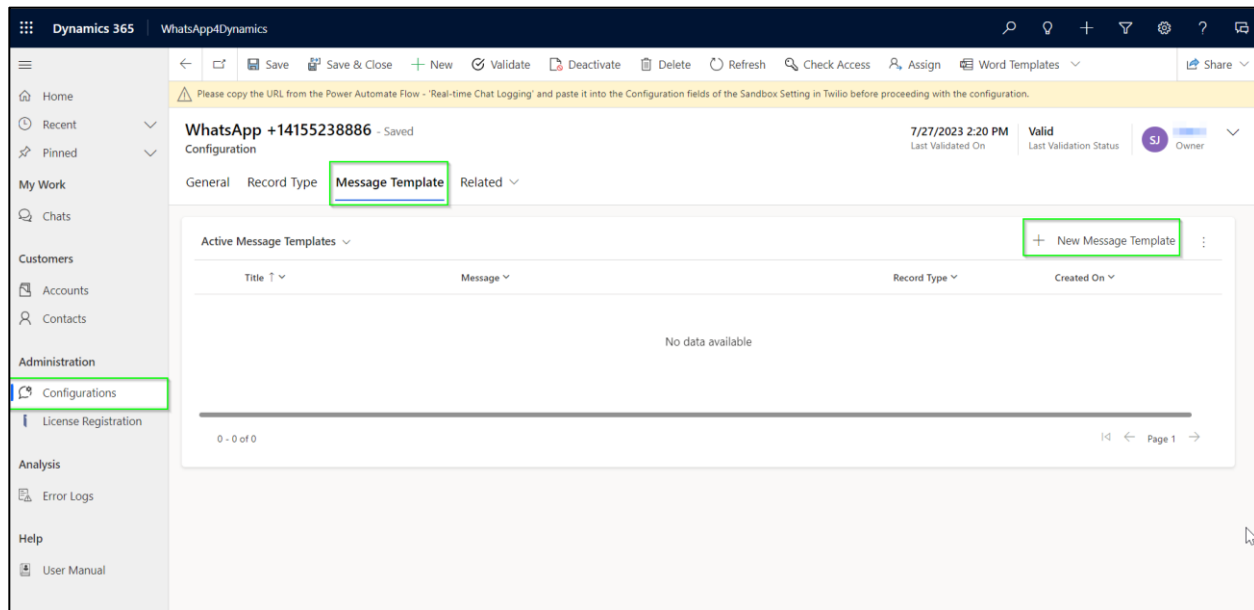
- **Fill Up All the Fields**:
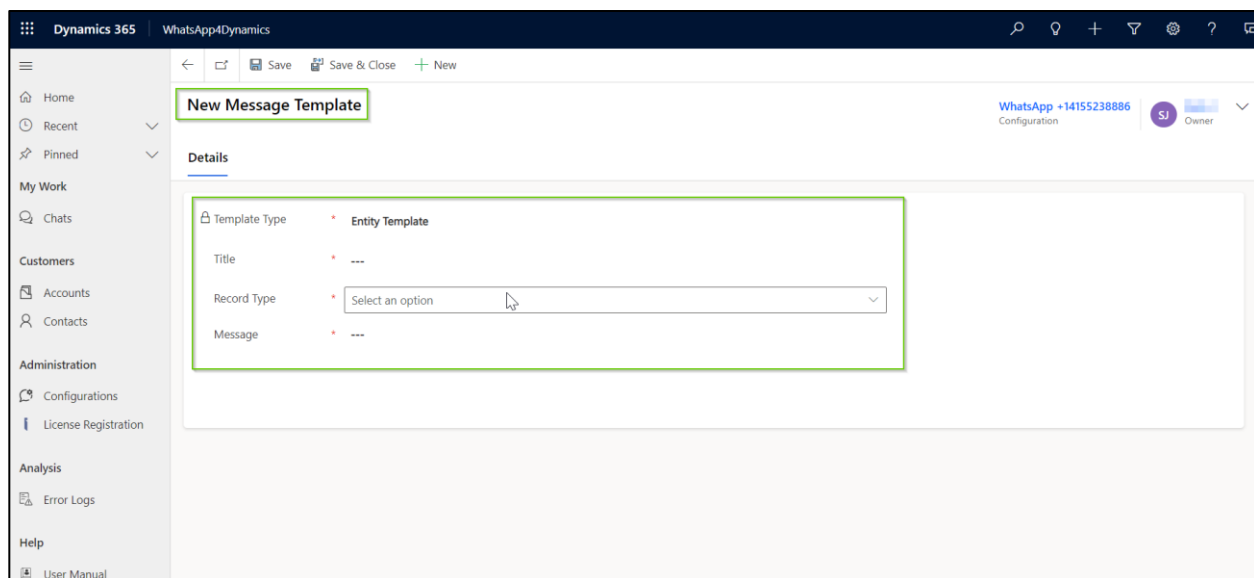
- ○ **Template Type** – Entity Template
- ○ **Title** – Add a fitting title or describe the template.
- ○ **Record Type** – Mention in which Entity the message template needs to show.
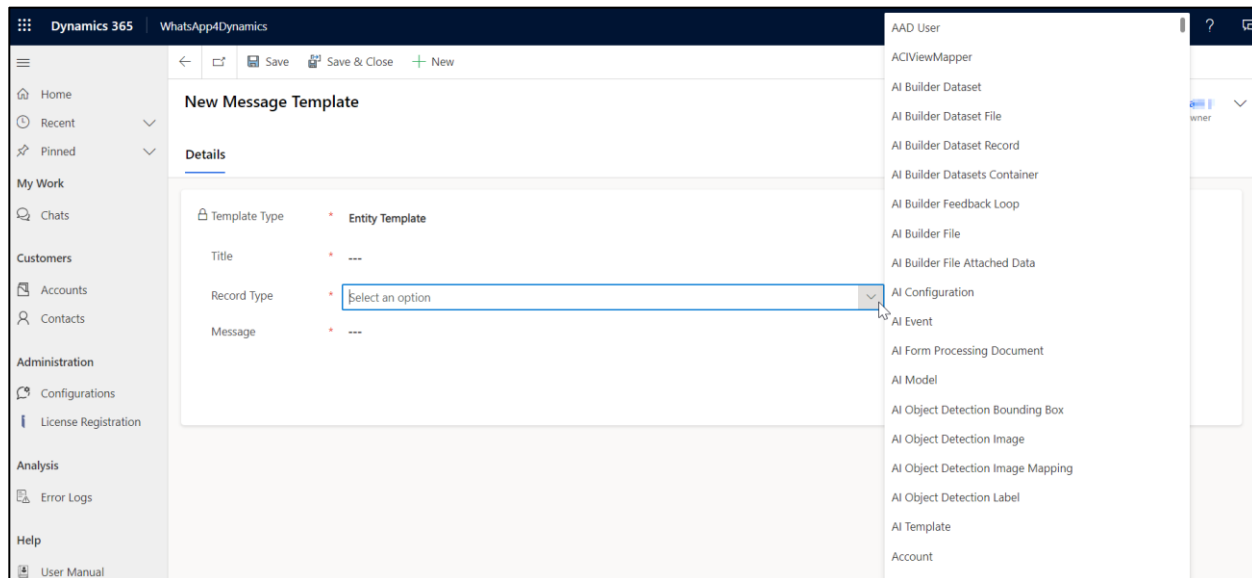
o **Message** – In the message section, copy & paste the template from Twilio and customize the curly brackets. Add dynamic values or CRM fields as values to create templates as required.

For Example: As shown in the screenshot below, the **Support** team has created a WhatsApp message reminder about the appointment for the **CRM Record (Contact).** *"Your appointment is{accountname} with{contactid}"* Here accountname & contacted are the dynamic values and can be changes as per your preference.
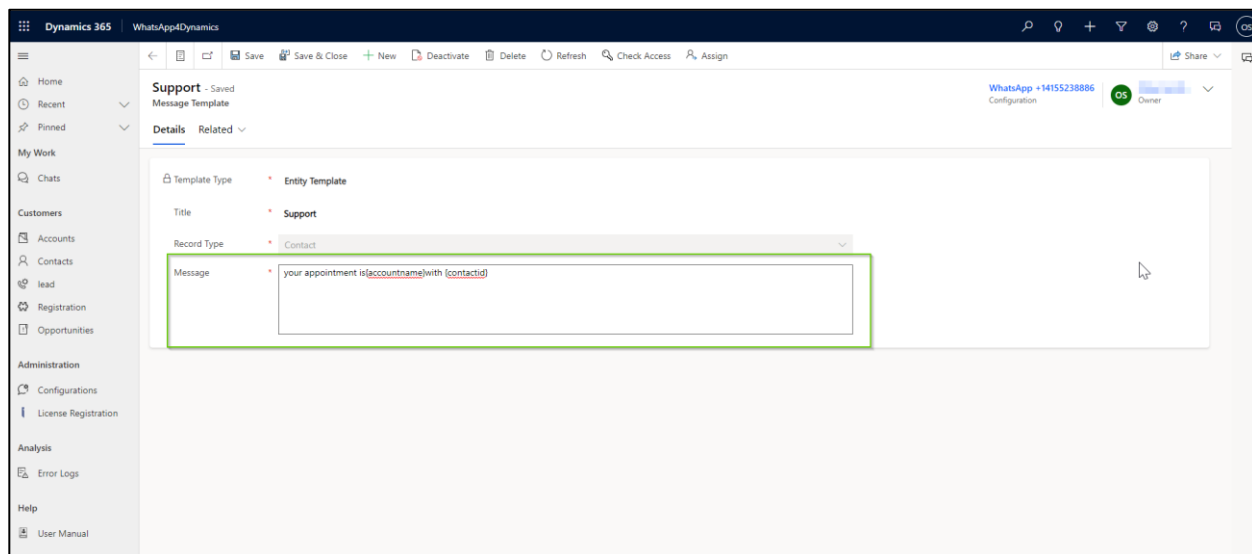
Please Note: Users can only edit the message field of the existing template.

Access Chat UI on CRM Records

WhatsApp4Dynamics provides a feature that allows users to access a Chat User Interface (UI) directly on CRM records. Moreover, having the Chat UI within CRM records enhances the overall user experience, as it eliminates the need to switch between different applications or interfaces to access WhatsApp conversations. It allows for a seamless and integrated approach to customer communication, which can

lead to improved customer service and relationship management.

I. Access Chat UI When "Regarding" of Chat Session Is Set

Chat UI is accessible from any CRM Records as well when Regarding is Set.

For Example: If a **Lead** record is associated as regarding to a particular session, then here is how you can access Chat UI from **Lead** record:

- Navigate to **Settings** --> **Customizations.**
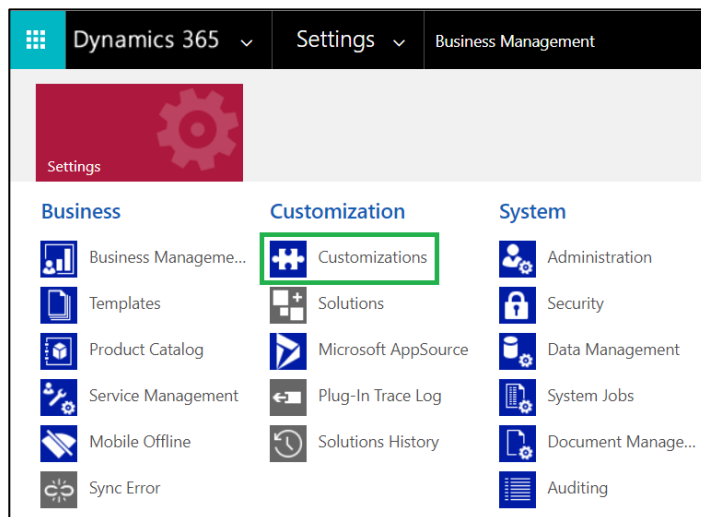
- Click on **'Customize the System'.**
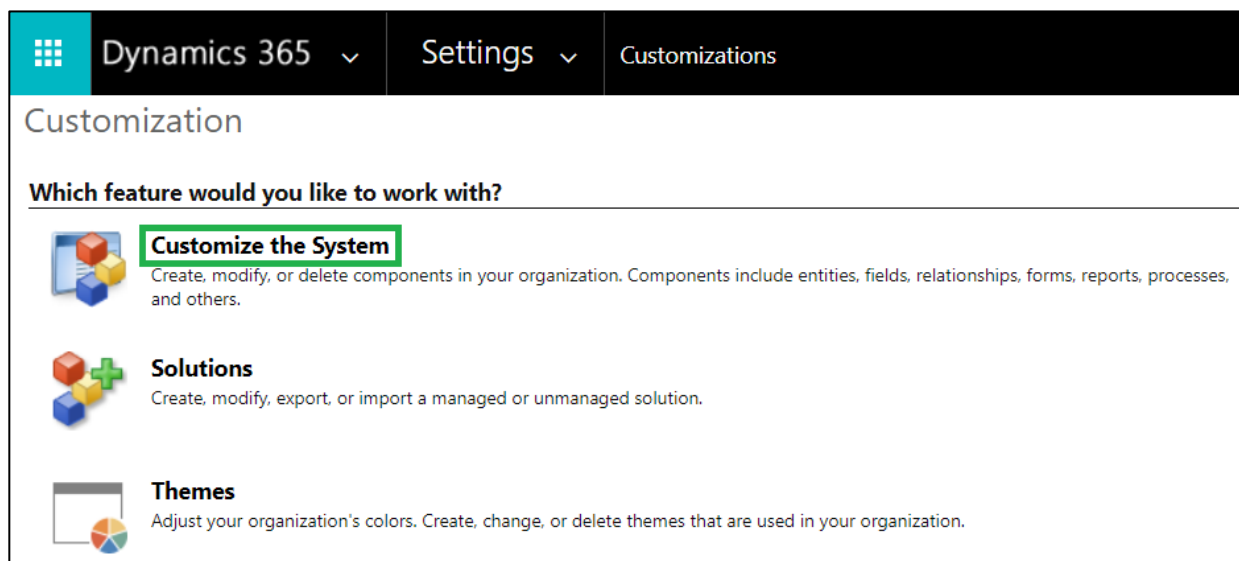
- Navigate to **Entities** --> **Lead** --> **Forms**.

- Click on Lead Entity with Form Type Main.
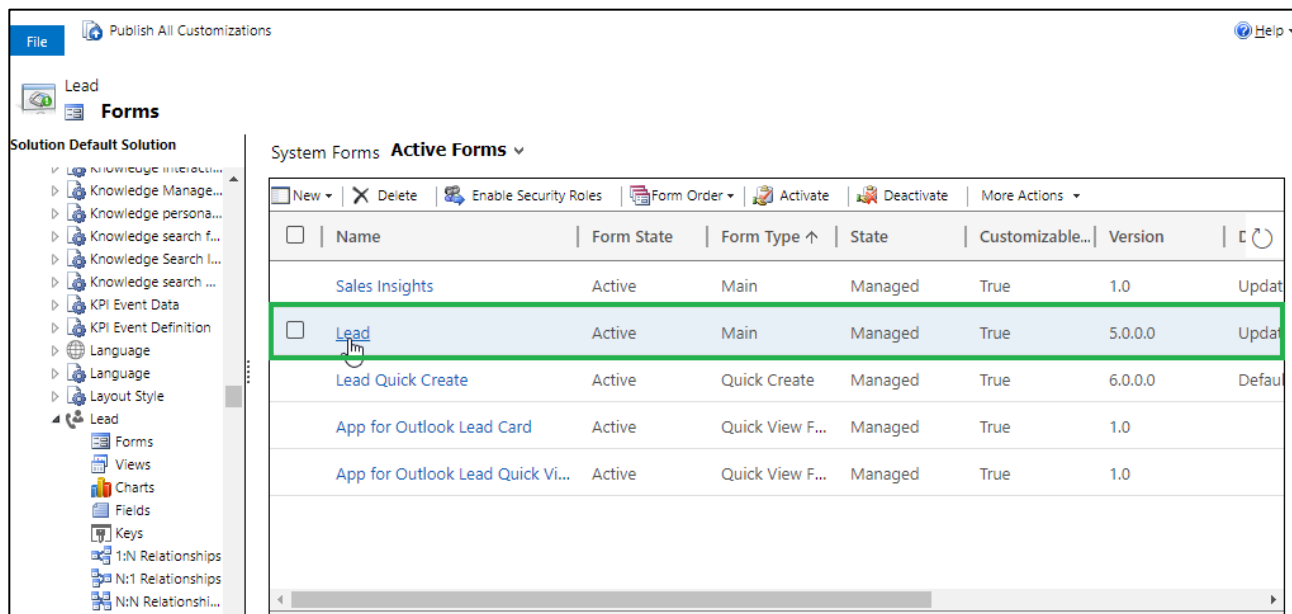
- Select (or Add) the Tab
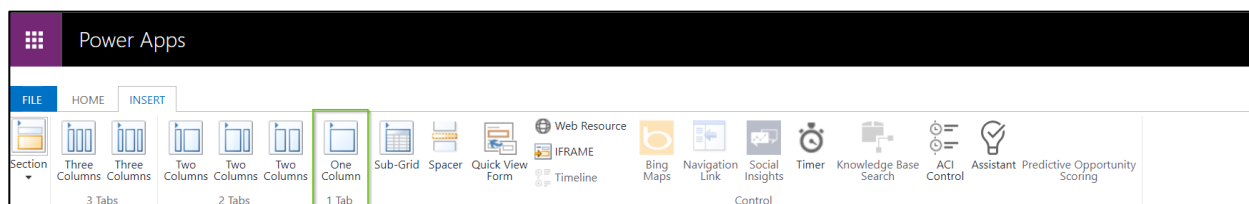
- Then Select, Subgrid.
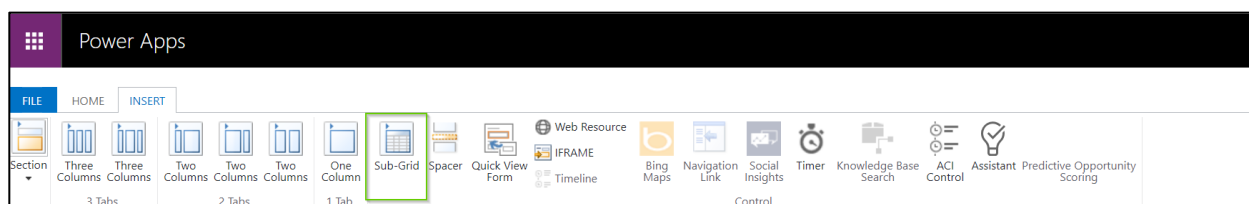
- A new window will pop up. Add the **Name**, **Label, Records** as **Only Related Records**, **Entity** as **Chat Sessions (Regarding), Default View** as **All Chat Sessions - Internal Purpose**.
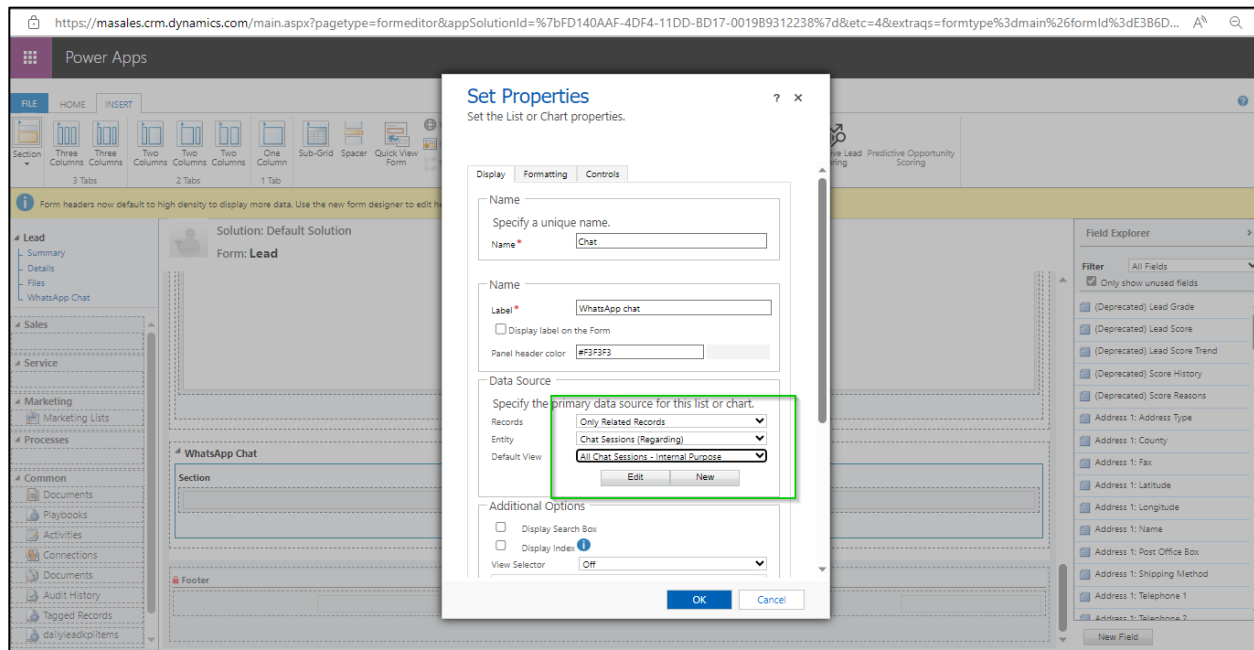
- Navigate to **Controls** and click **Add Controls.**
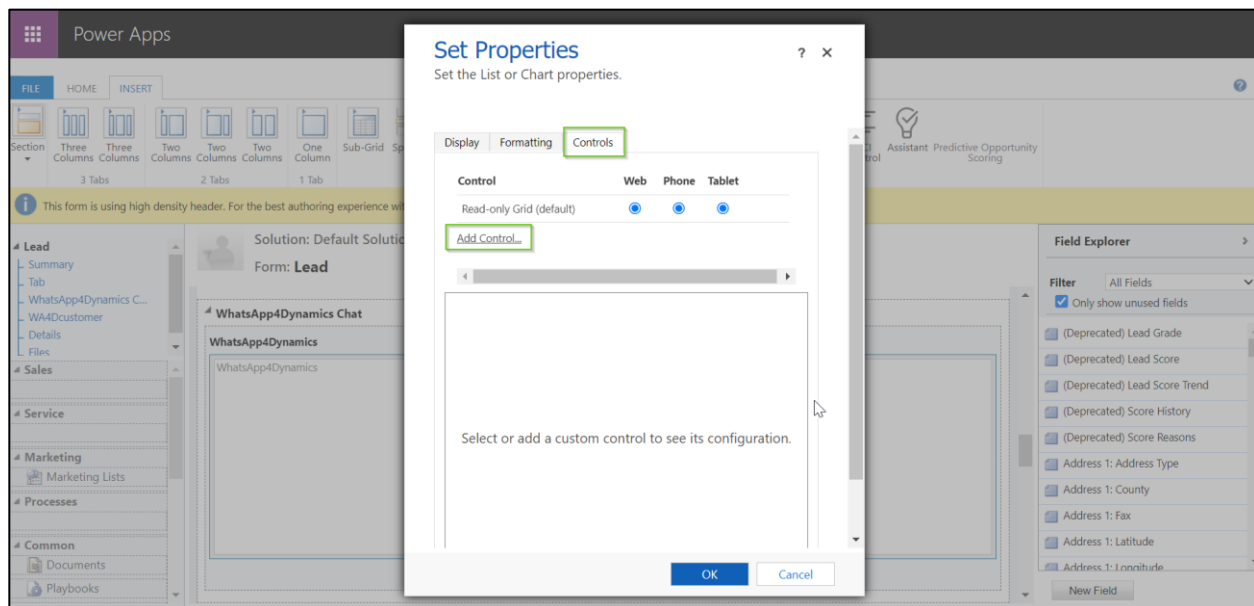
- From the dropdown list search for **Chat Systems** and add it as a control.
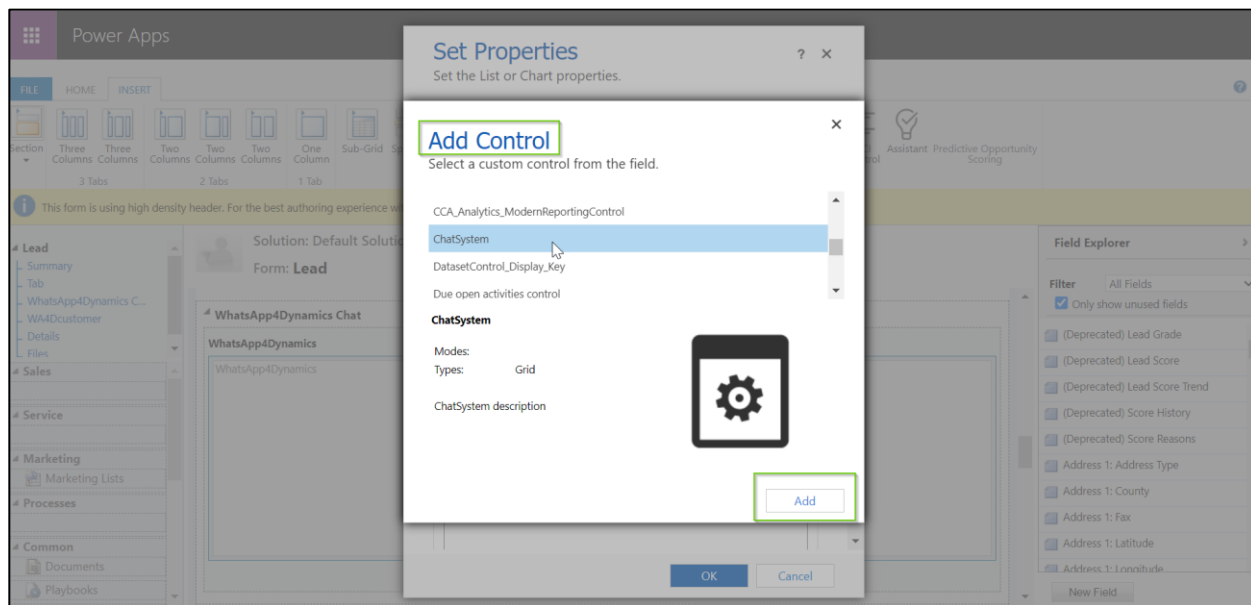
- Once done, **Chat Systems** will be shown under the **Controls Tab** and you can enable it for multiple devices to access it accordingly.
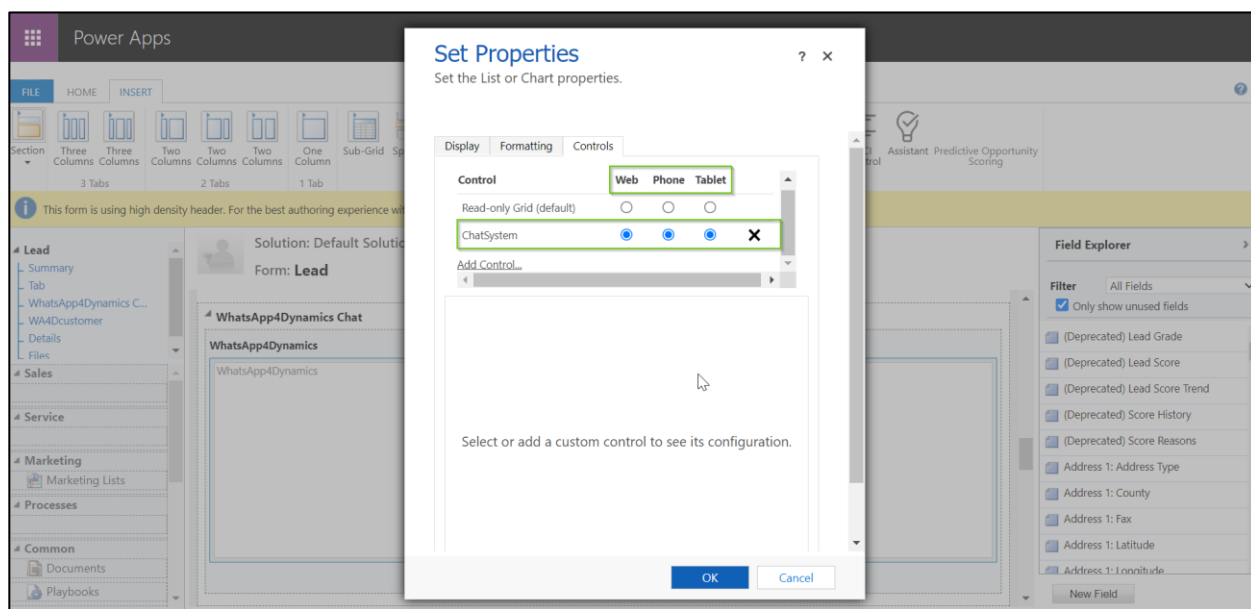
- After clicking **Ok**, and then click on **Save** & **Publish** for the grid to be visible.
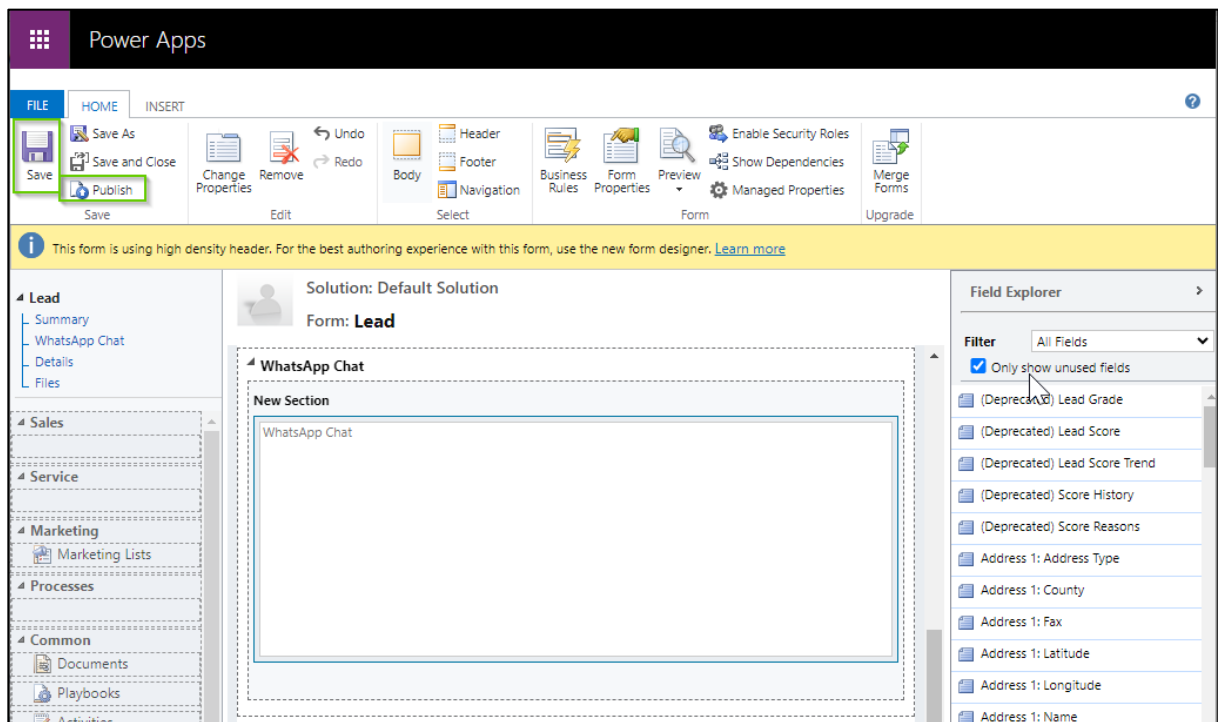
- Once done, you can view the Chat UI on the Lead Record and communicate with the customers directly, as shown in the screenshot below.
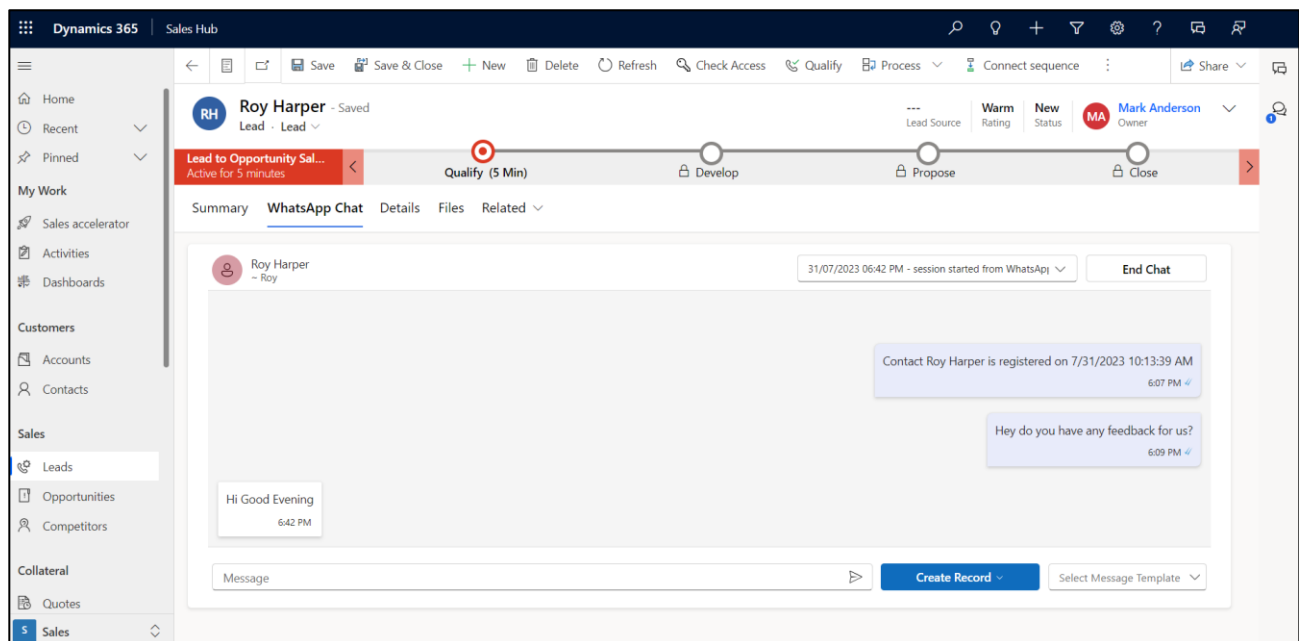
II. Access Chat UI When "To" of Chat Session Is Set

In case "To" is set in Contact field, then you can directly go in **Contact - CRM Record** and start communicating with the customers / contacts.
To do so,

- Go to **Contact, Click** Related**.**
- Navigate to **Chat Sessions**
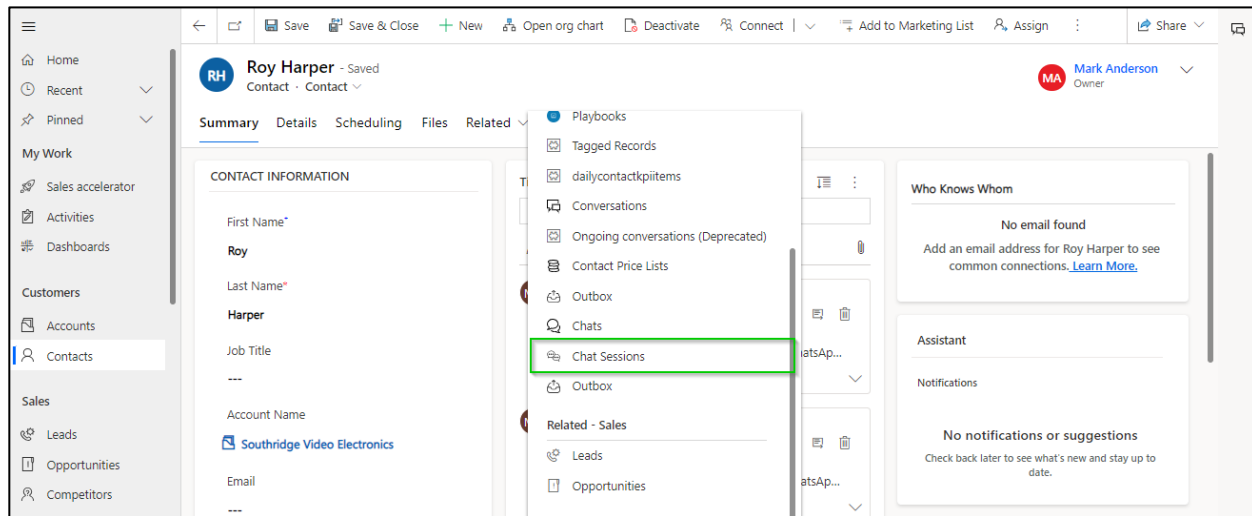
- Start chatting with the respective **Contact**.
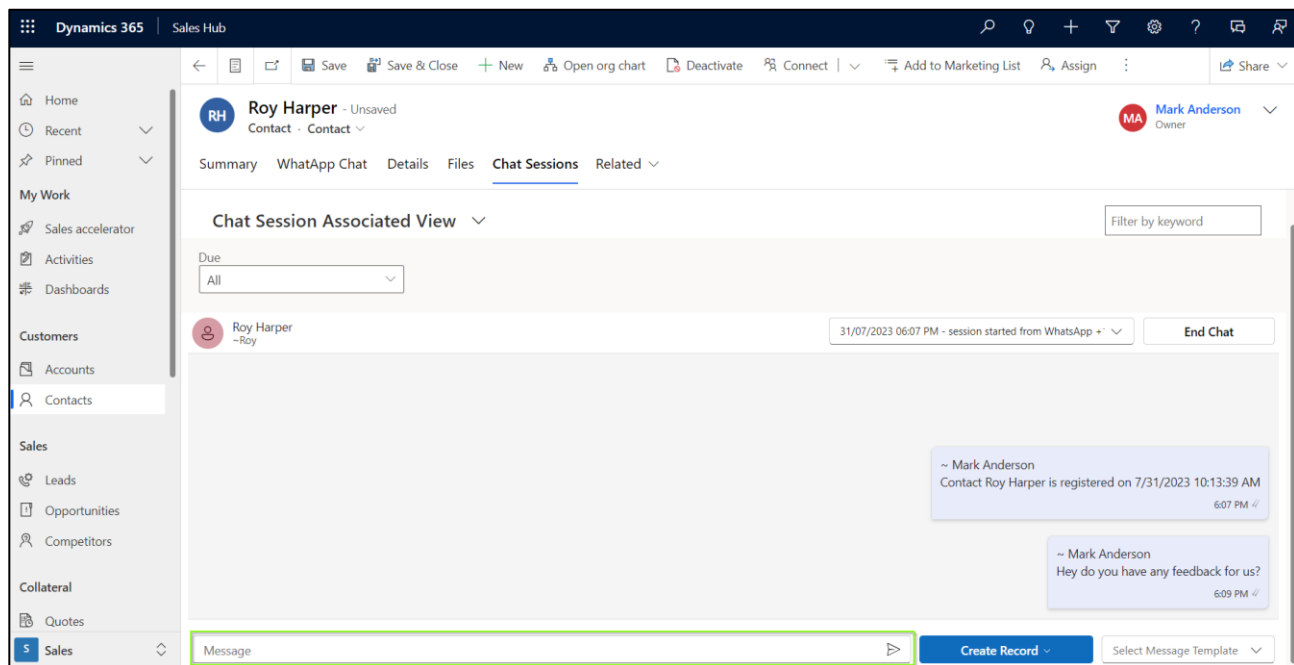
Features
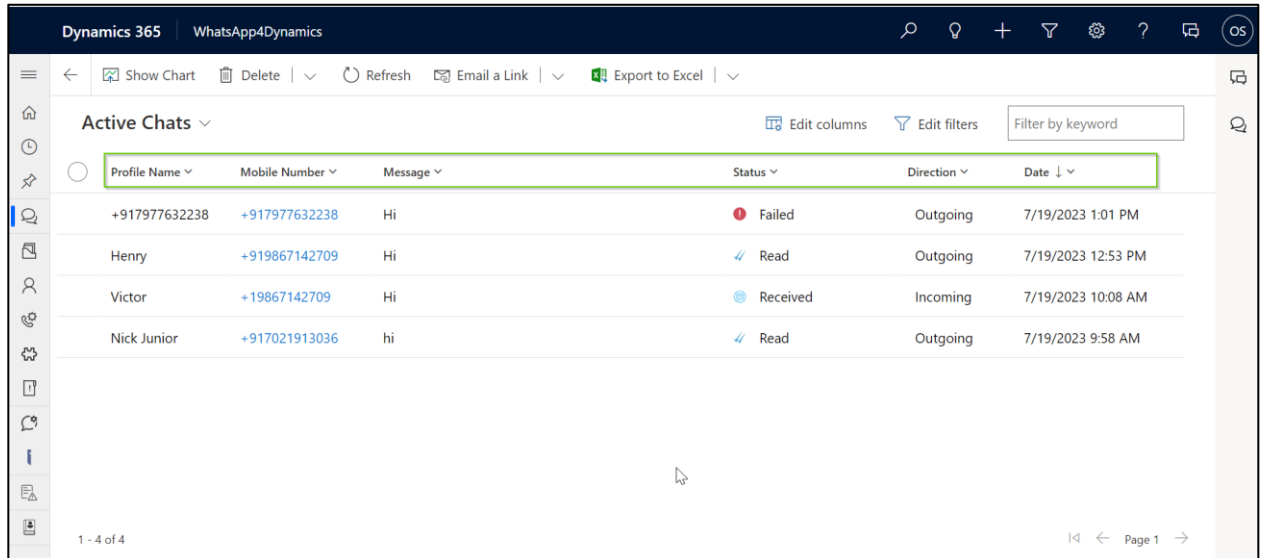
WhatsApp Conversation Manager in CRM

WhatsApp4Dynamics provides a seamless integration between WhatsApp Business Account and Microsoft Dynamics 365 CRM. It allows users to communicate with customers and partners directly within the

Dynamics environment and eliminates the need to switch between different platforms.

With WhatsApp4Dynamics, you can enjoy the same experience of WhatsApp in Dynamics 365 CRM.

- Chats will show the following information:
    - o Profile Name – This shows the WhatsApp Profile name set by the user.
    - o Mobile Number – This shows the Mobile number with Country Code of the user.
    - o Message – Content of the message sent or received.
    - o Status – This field describes the Status of the message, such as whether the message is sent, delivered, received, read, etc.
    - o Direction of the message – In this field you can view if a message is an incoming or an outgoing message.
    - o Date and Time - Similar to WhatApp, you can view the date and time of when a message was sent, delivered, received, read, etc.

Chat Notification

Chat notifications in WhatsApp4Dynamics are the new incoming WhatsApp messages that you receive within the Dynamics platform. These notifications play a crucial role in keeping users informed, ensuring they can respond promptly to customer inquiries and other important messages.

While navigating from entity to entity, if you receive a notification, then the chat bubble on the right-hand side will notify the total count of unread chat message.
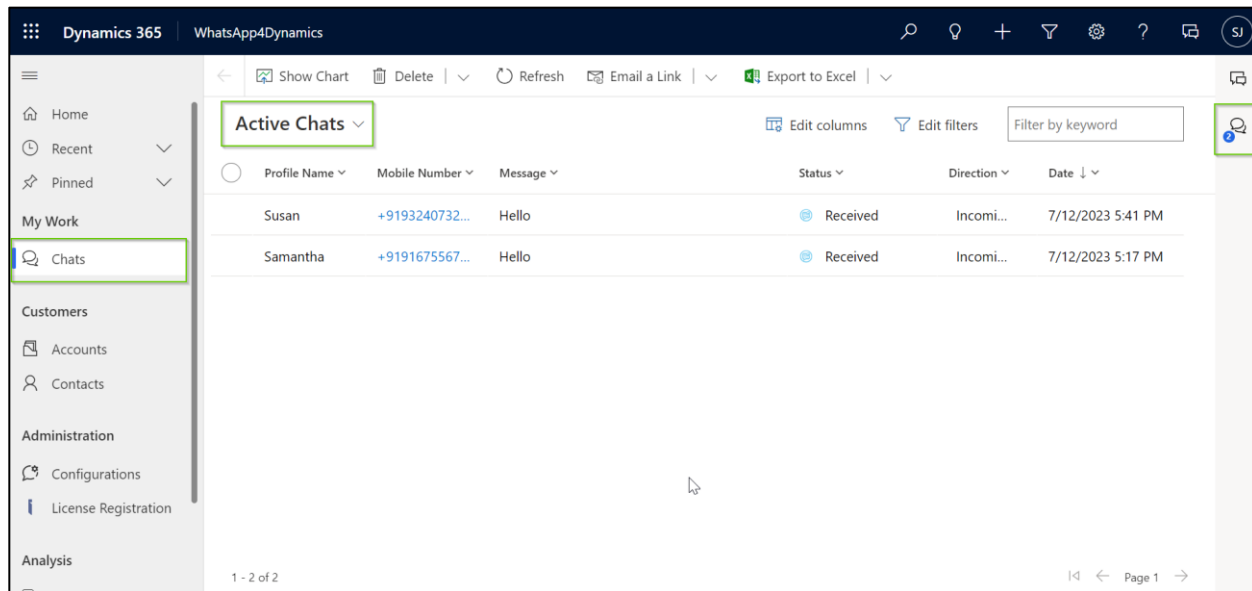
- **Once you click the Chat Bubble**, various buttons will be accessible through which you can directly go on the chat UI.
  - o In case you receive a WhatsApp message for the first time in the CRM, you need to either **Accept or Decline** the Chat.
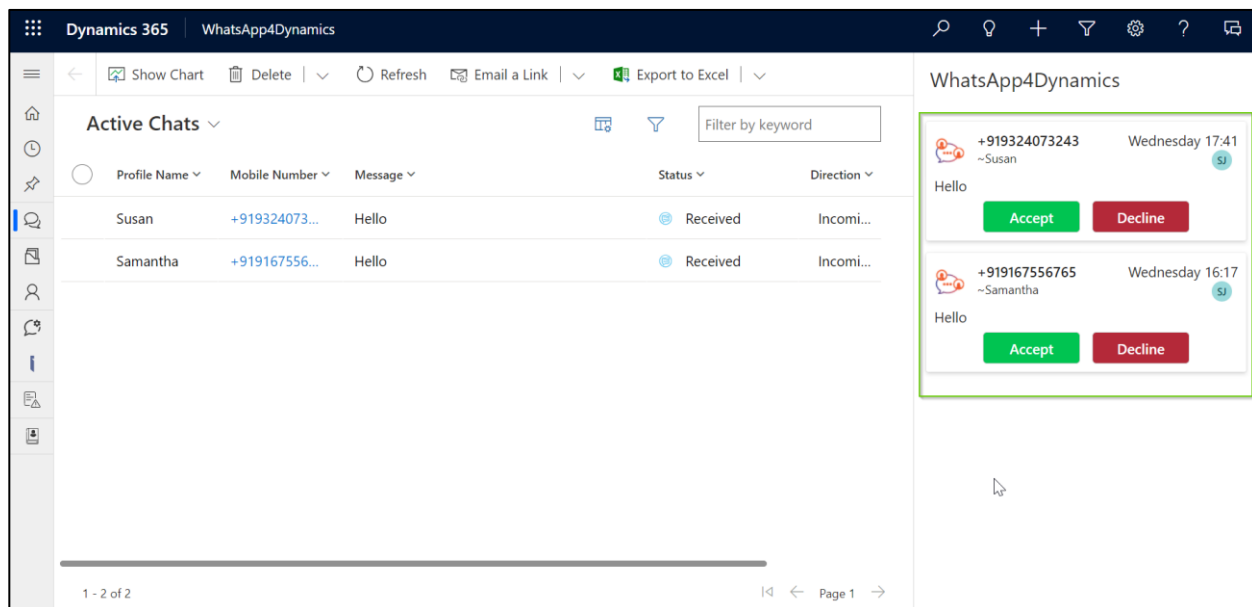
  - o Once Accepted, future WhatsApp message from the same contact will be prompted as **View Chat**.
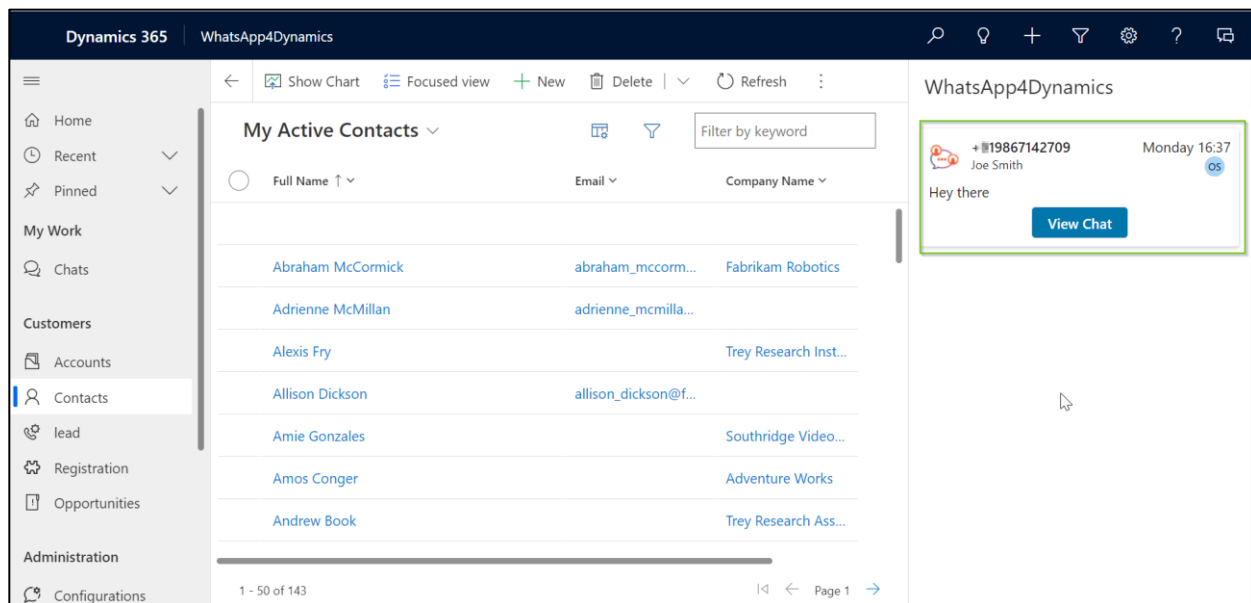
- o Even if several CRM users have logged in, **View Chat** button will only be displayed to the **Chat Session Owner**. However, if the chat exceeds idle timeout period, which was configured on the configuration record, then other users will be prompted to assign the chat to themselves with the **Assign Me** button and **Change Ownership** by confirming **Yes / No** to continue chatting.
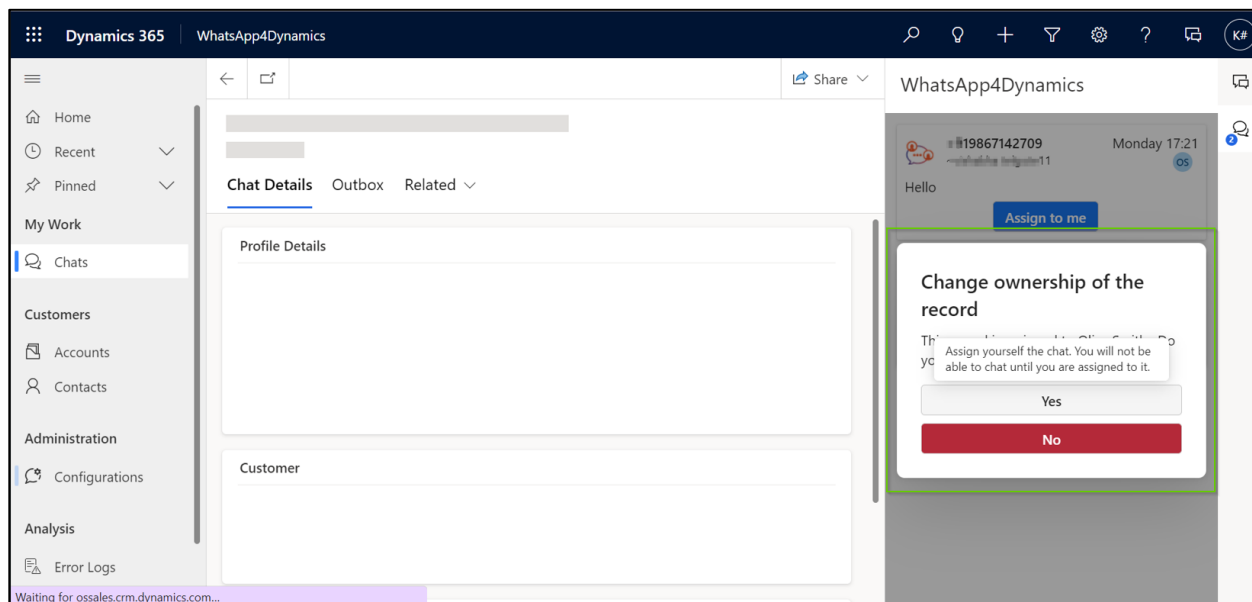
Please Note: WhatsApp notifications are fetched when the model-driven app is initially launched. However, if a user remains on a page for an extended period, new notifications will not be fetched until the user navigates to a different page.

Mapping CRM Records

Mapping CRM Records is possible with WhatsApp4Dynamics! WhatsApp4Dynamics finds CRM records (any record types created during the configuration process) and maps them with the new chats on the basis of their mobile number. This enables more informed and context-rich conversations and helps deliver personalized support.

For Example:

- In the below example, **Roy** is **Account** in the CRM that is **mapped by WhatsApp4Dynamics** from the phone number associated.

- However, Roy has also set his profile name on WhatsApp. Hence it also shows under the **Profile Name** field as well.

Please Note: In case there are multiple entities with the same phone number, preference will be given to the first record type that was created.

Easy-To-Use Chat User Interface

WhatsApp4Dynamics allows users to access an easy-to-use Chat User Interface (UI) within the CRM environment that is integrated with WhatsApp. This integration enables users to initiate and manage WhatsApp conversations with customers from a single platform.
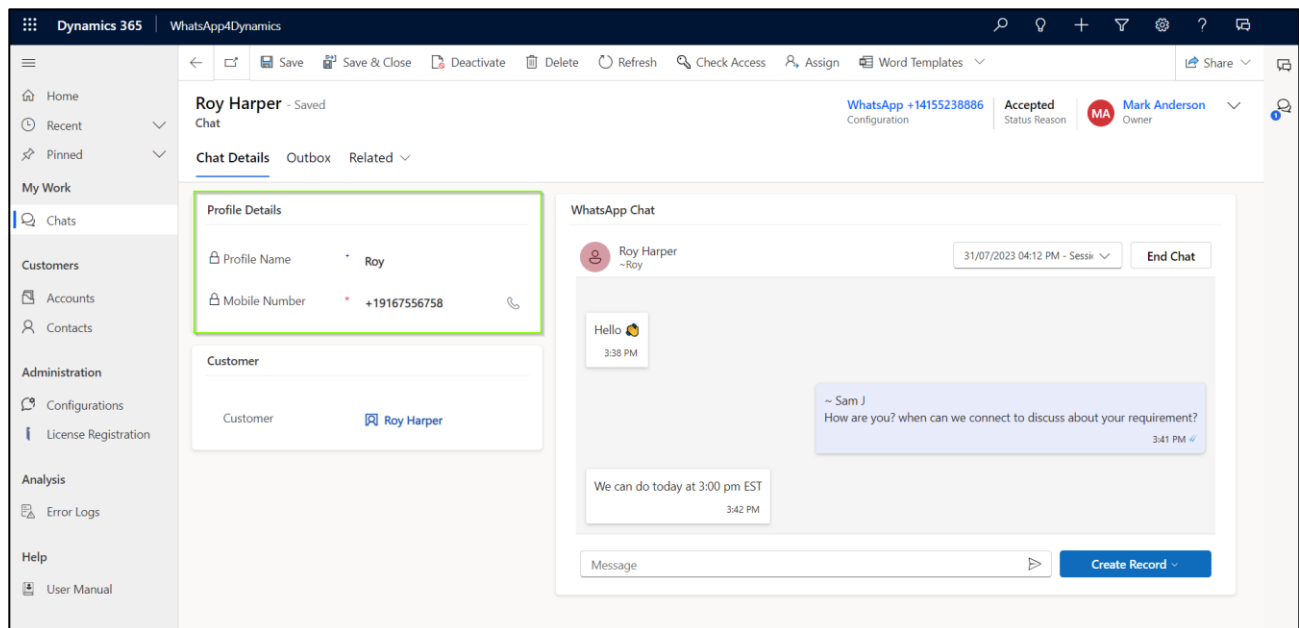
Here are some key features that you can benefit from this integration:

    I.   Communicate directly from CRM Records:

You can start communicating on WhatsApp directly from CRM Records. This feature streamlines the process of interacting with clients and provides a convenient and familiar channel for direct communication, making it easier to manage and maintain customer relationships within the CRM system.

For Example: If you want to initiate a chat with one of your contact using WhatsApp4Dynamics.

- Click on **Contacts** and select the **Contact** you want to communicate with.
- Go to **WhatsApp Chats** and sent WhatsApp messages directly to your customers from the CRM.
- Choose the configured **WhatsApp number** or the **Contact Template** to start messaging.
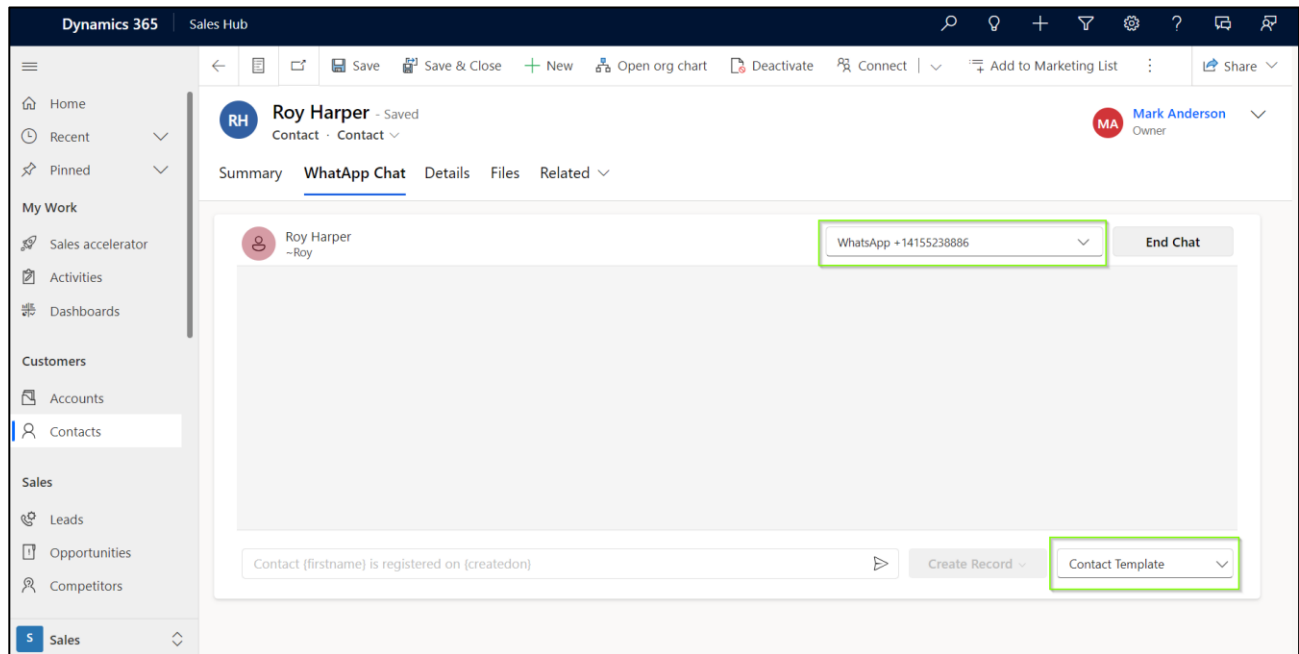
- Below is a screenshot that displays how easily you can chat with your **Contacts** from within the Dynamics 365 CRM itself and communicate with the customer on WhatsApp.
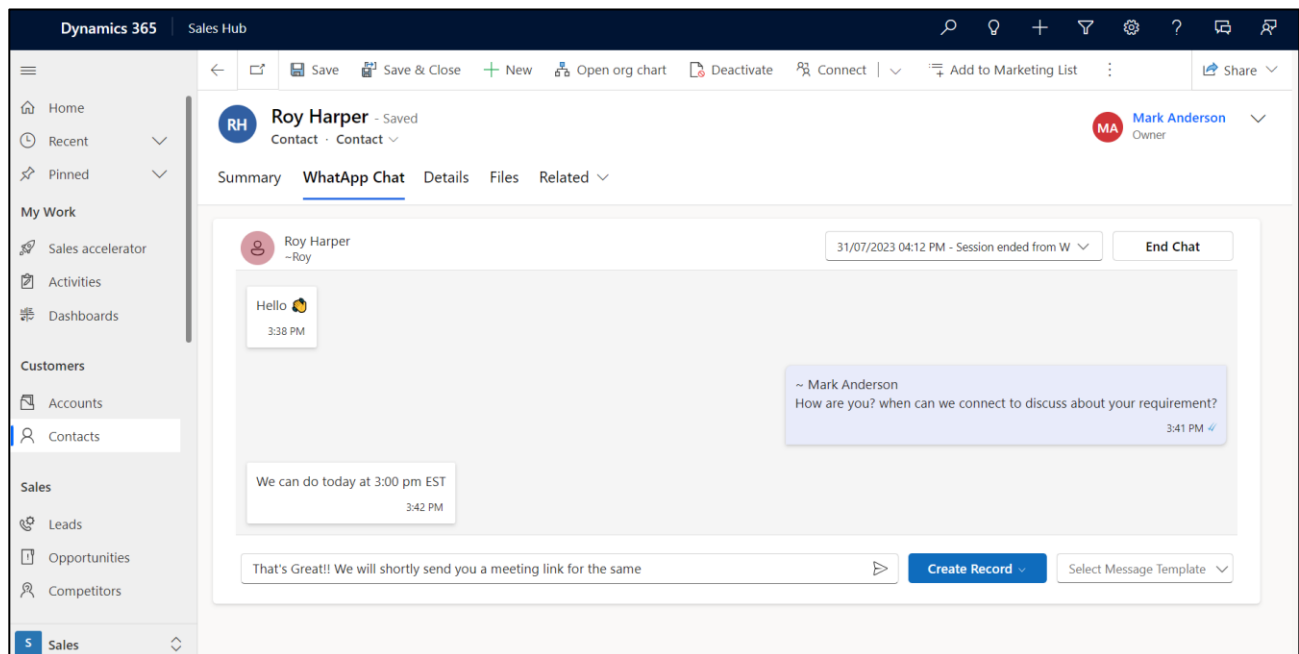
Please Note: Note: If you wish to view the Chat UI within any of the CRM Records you would have to configure it beforehand. Follow this link to know more.

II.   Create CRM Record from WhatsApp (OOB or any Custom Entity):

WhatsApp4Dynamics offers a convenient feature that allows users to create CRM records directly from WhatsApp chats. This integration streamlines the process of capturing customer interactions and converting them into actionable CRM data, making it easier for businesses to manage their customer relationships effectively.

Create CRM records from WhatsApp chats, whether in an Out-of-the-Box (OOB) entity or a Custom Entity.

- Suppose you want to **Create Record** from an ongoing conversation, then you can click on Case, Opportunity or any other configured entity.
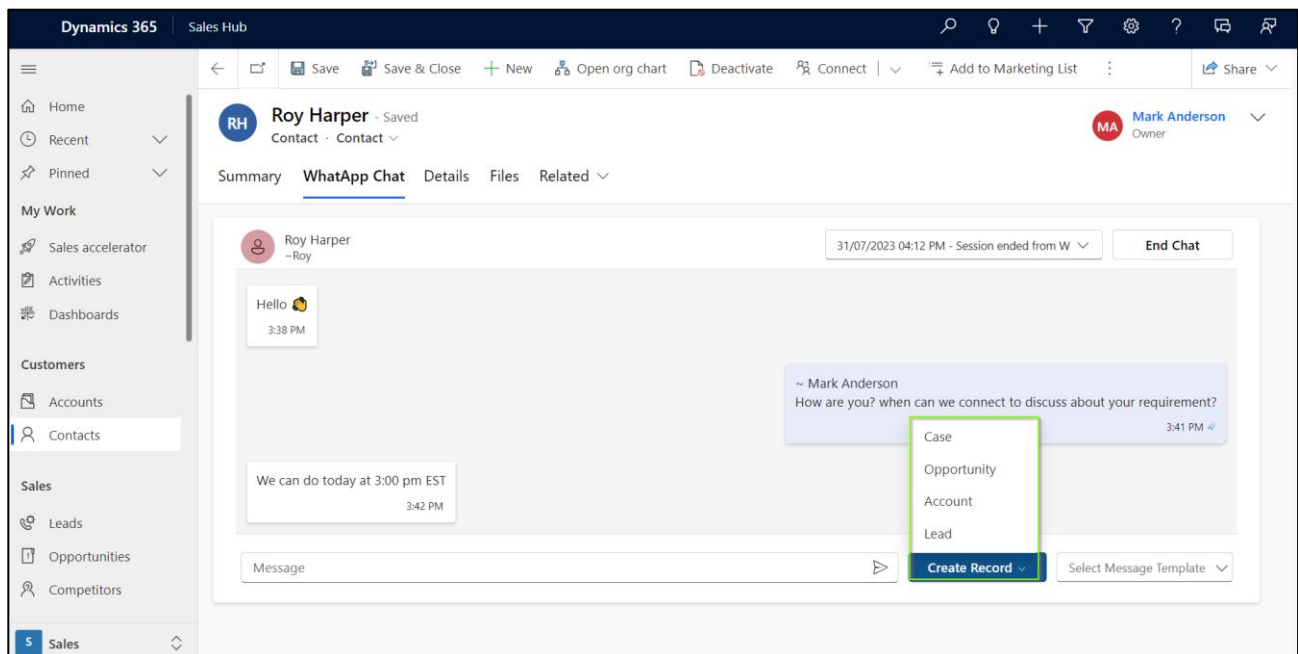
- As shown in the above screenshot, in case you would like create a **Lead** from the above conversation.

  - o Click on **Create Record** and Select **Lead**
  - o The main form of CRM will open up, fill the details and click on **Save & Close** to create a **Lead**.
  - o The Record created here will set as '**Regarding**' automatically for the related chat session.
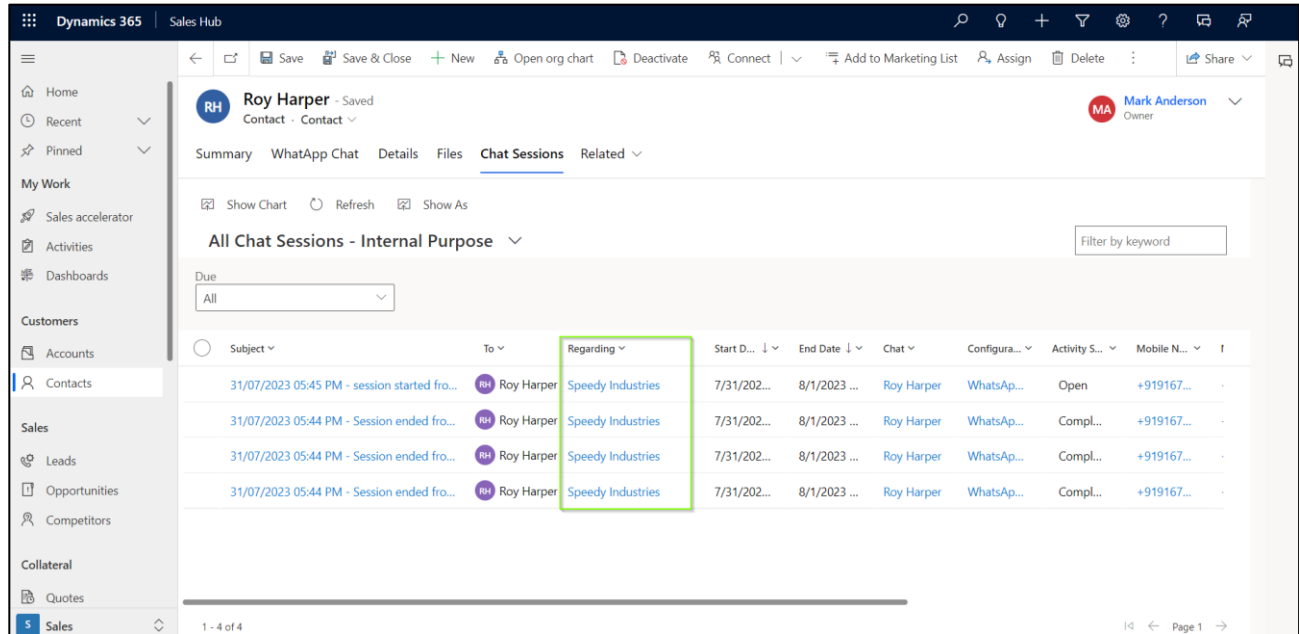
You can now directly chat with the Lead from the CRM Records as well, check the configuration here for more.

Please Note: During the configuration process, Records set in **'Allow To"** will be listed in the **Create Record** button.

III.   Supports multiple languages & file formats in Chat UI:

WhatsApp4Dynamics typically supports multiple languages and various file formats within its Chat User Interface (UI) integration. This means that users can interact with customers using WhatsApp in their preferred language and receive different types of files seamlessly within the CRM environment.

Users can send and receive messages in preferred language and emojis. As well as receive images, videos, PDF and word documents to enhance the overall user experience and accessibility.

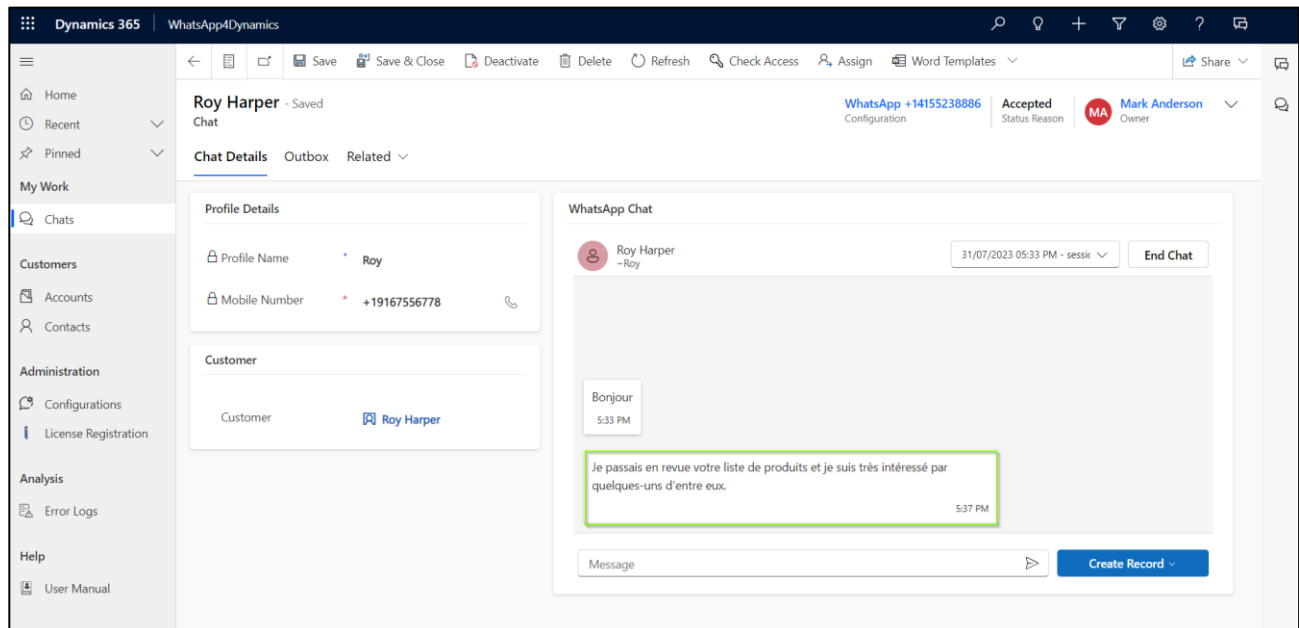These file formats can also be seen in the Chat Notification, as shown as the screenshot below.
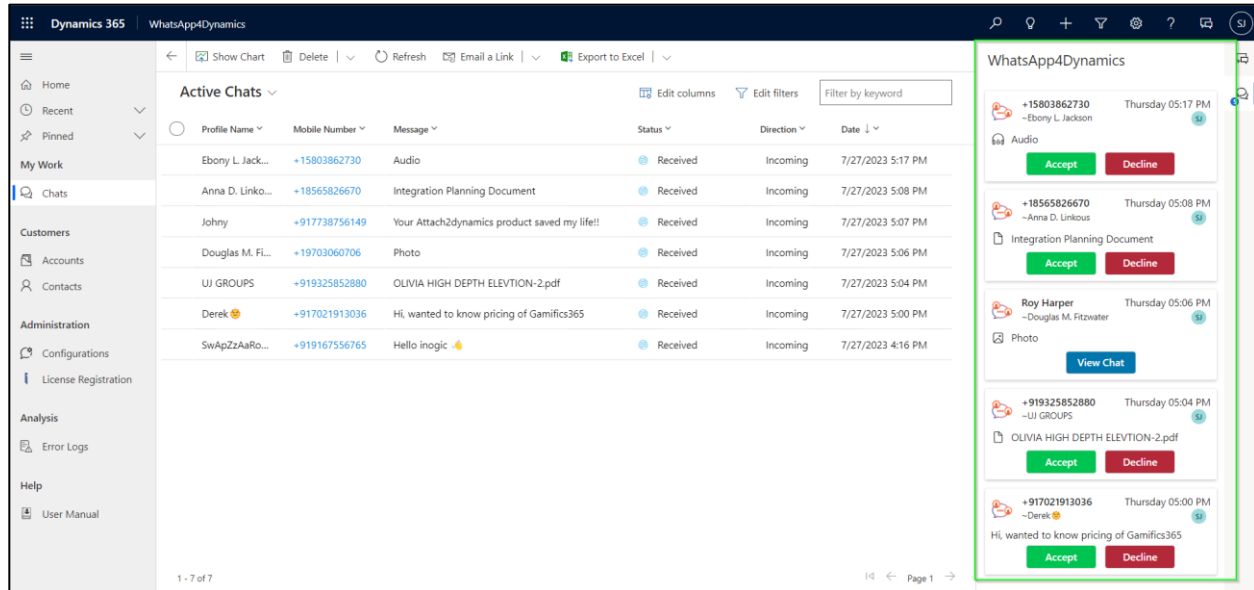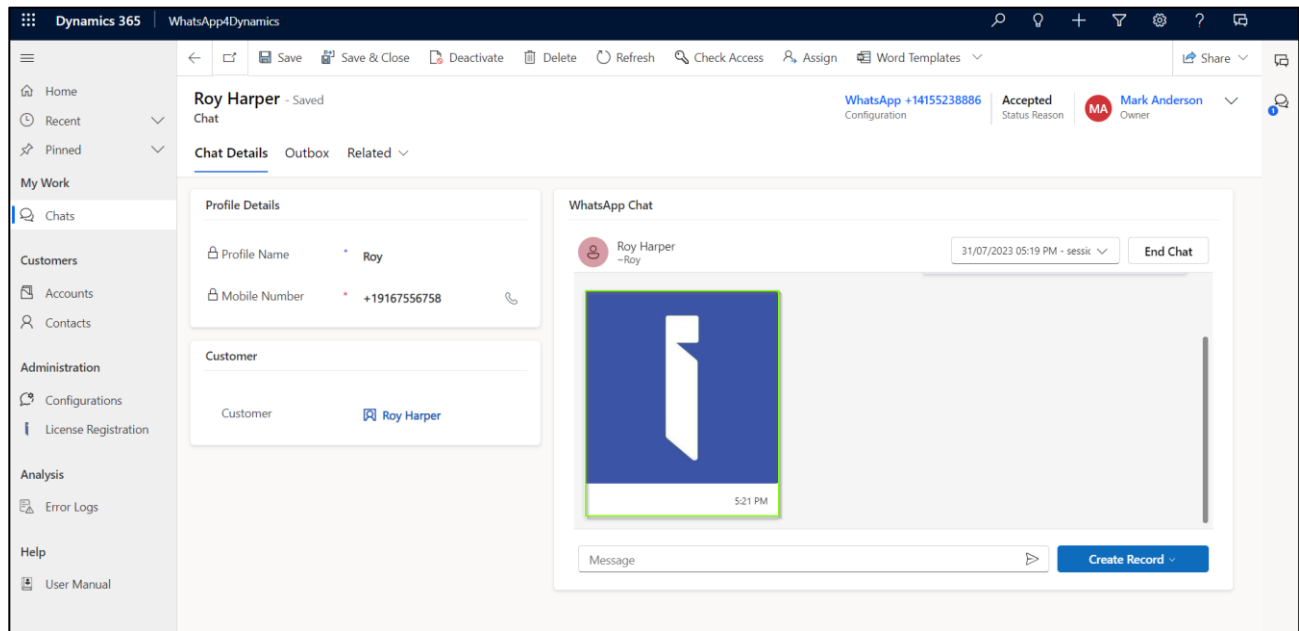
And within the Chat UI,

- Here is a screenshot that shows a **French** text from a contact.

- Here is a screenshot that shows an **Image** received from a contact.

Please Note:

- In a Chat UI, we employ polling to fetch messages at regular intervals when a message is sent. However, if a user remains on the same page for an extended period, new messages will not be fetched until the user navigates to another page and opens a specific chat record.
- We only support text messages. However, you can receive images, videos, PDF and word documents.
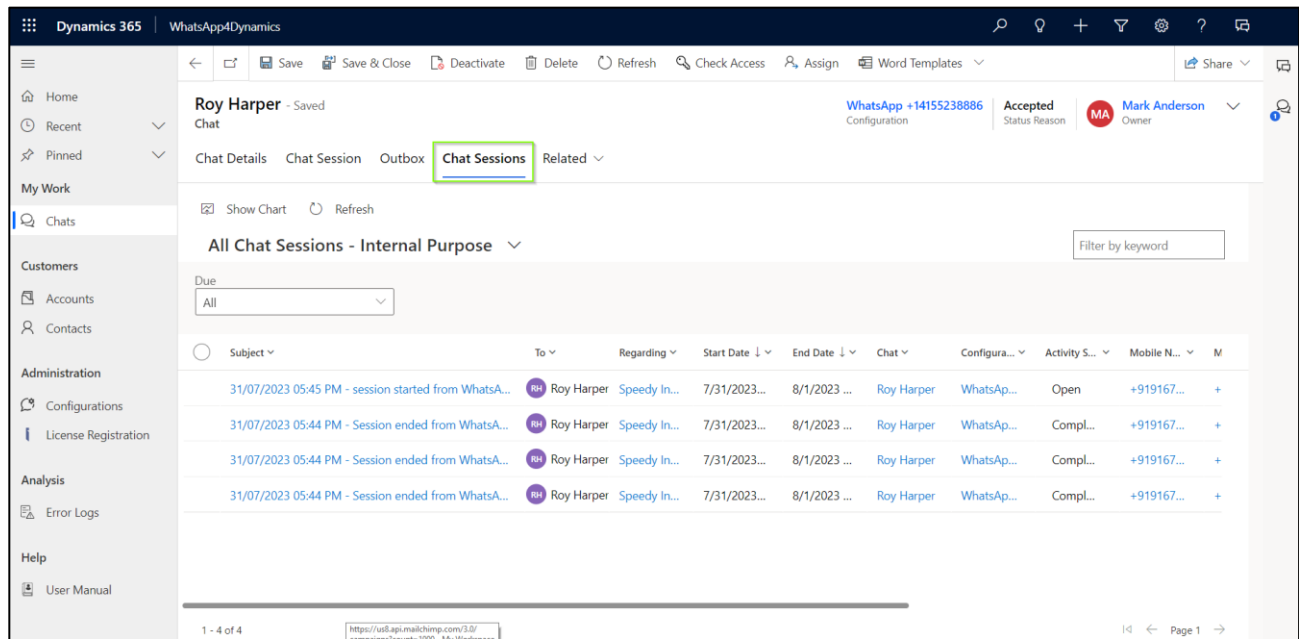
Store Chat History in Chat Sessions

WhatsApp4Dynamics provides the functionality to store chat history in chat sessions. This means that when you communicate with customers through your WhatsApp Business Account from within the CRM, the entire conversation history is recorded and stored as a chat session.

Users can maintain **WhatsApp chat history** associated to each **Record with Dynamics 365 CRM** and track communication.

- **To** means the customer/partner with whom you would be chatting.
- **Regarding** defines the associated **Record.** (Record that was created from within the Chat UI)
- "**Start /End Date & Time**" will be mentioned for each session. (Each chat session will be maintained for 24 hours as per UTC Standard Time.)
- **Configuration** describes from which WhatsApp channel you are communicating.

    Below is a screenshot showcasing the listicle view of the chat sessions.

**Chat History can also be accessed from within the Chat UI.**
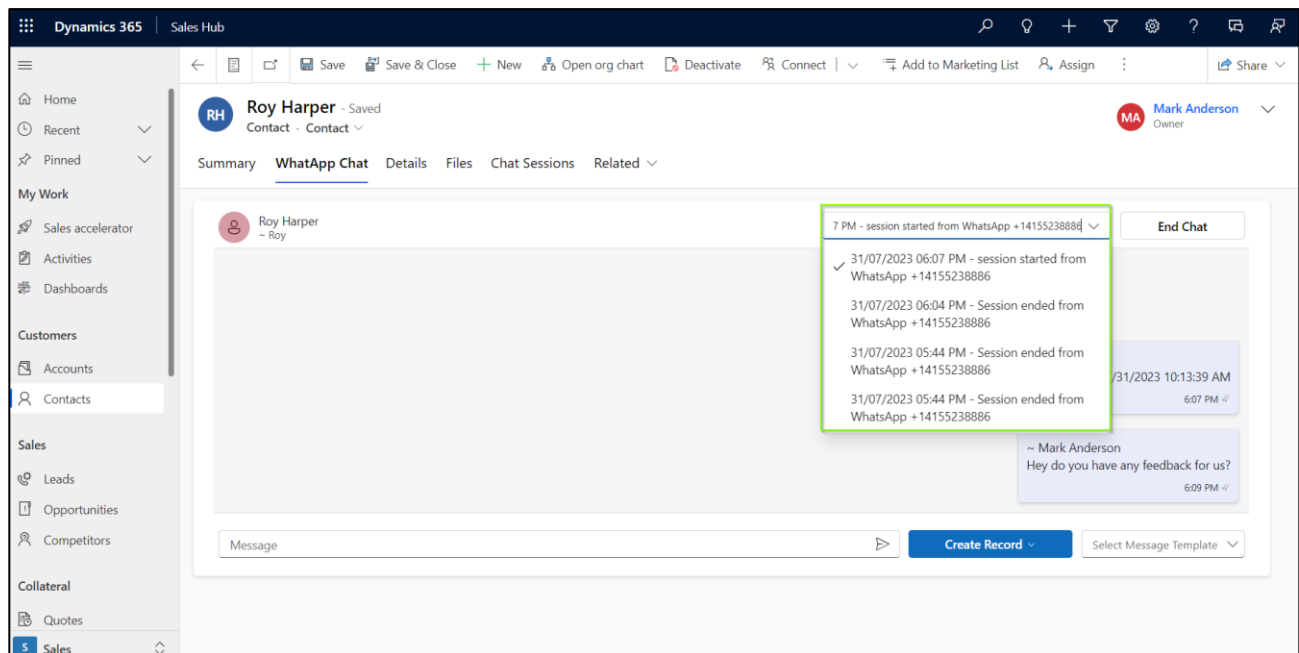
## Trigger & Send Automate WhatsApp Messages

With WhatsApp4Dynamics, automate sending messages through workflows within Dynamics 365 CRM. Users can set up triggers and actions based on specific events, such as sending automated WhatsApp messages for order confirmations or appointment reminders. This automation saves time, reduces manual effort, and ensures timely communication.

For Example: Here we have set an automated **WhatsApp Trigger** message on **Order Creation**. Which means every time an order is created in CRM, the respective contact number associated to the order will receive an automated message.

- In order to set triggers and automate workflow, click on the **Settings Icon** and navigate to **Advanced Settings.**
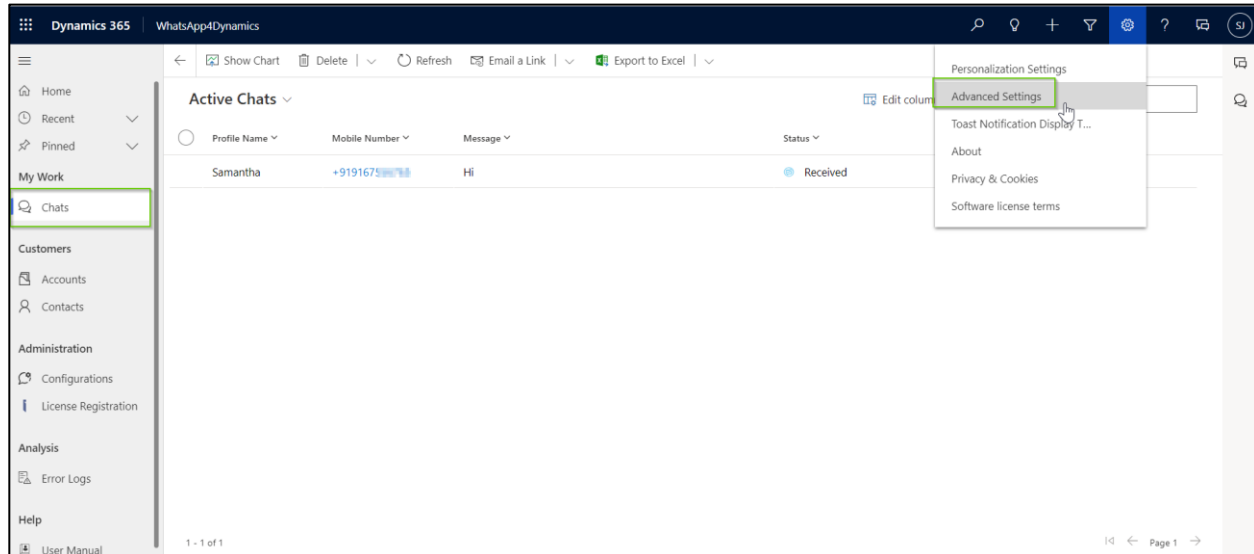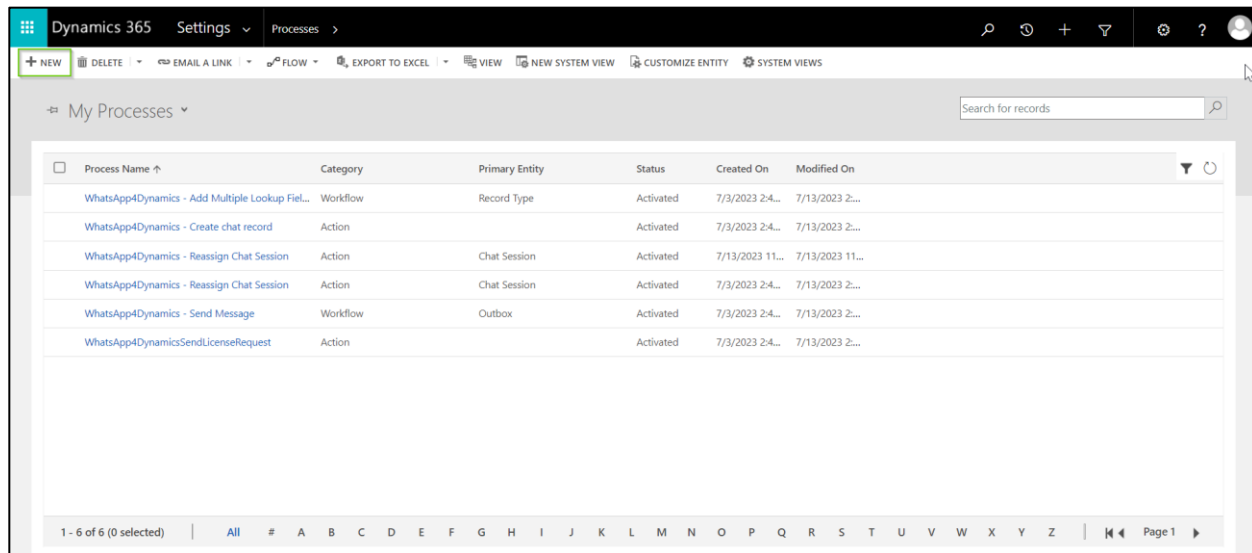

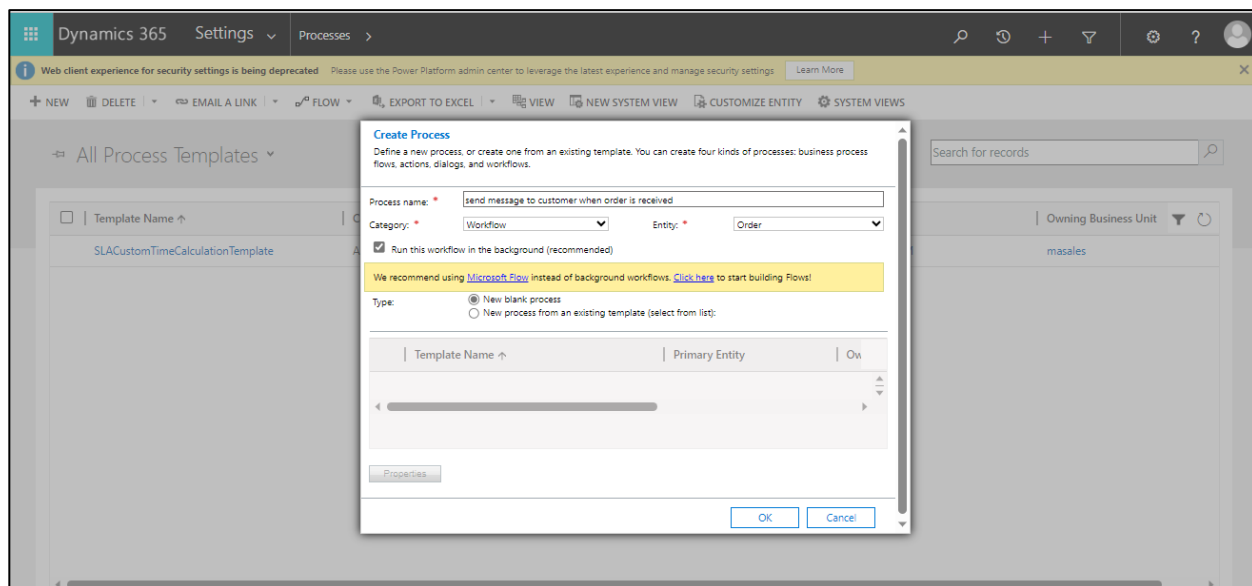- Dropdown the **Settings** and click **Processes**
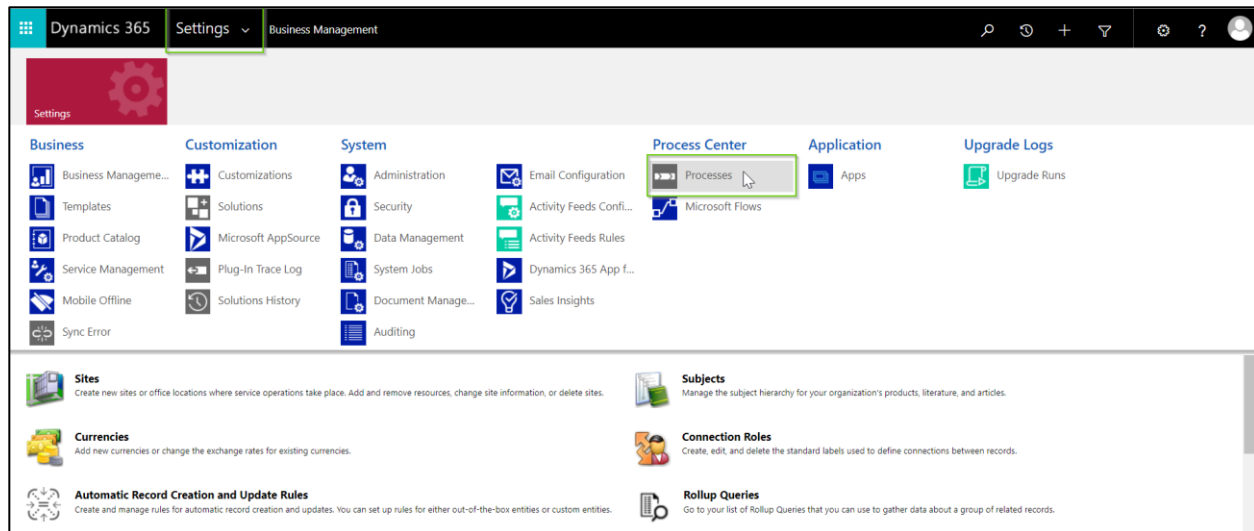
- You can create '**Workflow**' as per your requirements, by **clicking the +NEW button.**

- Mention **'Process Name'**, select **Category** as '**Workflow'** and '**Entity'** as per your preference.


- After clicking **OK**, a new window will appear, as shown below. You will already see the **Process Name, Activate As, Entity**, and **Category**, as added in the previous window.
- And configure the '**Workflow'** as per your requirements.
- You now need to **'Add Step'** in the **Workflow** to select and configure messages to be sent. The step will represent a specific task, that the workflow will perform when triggered by a defined **event /condition**. Here we have navigated to **Create Record** and selected **Outbox** to set the **Properties.**
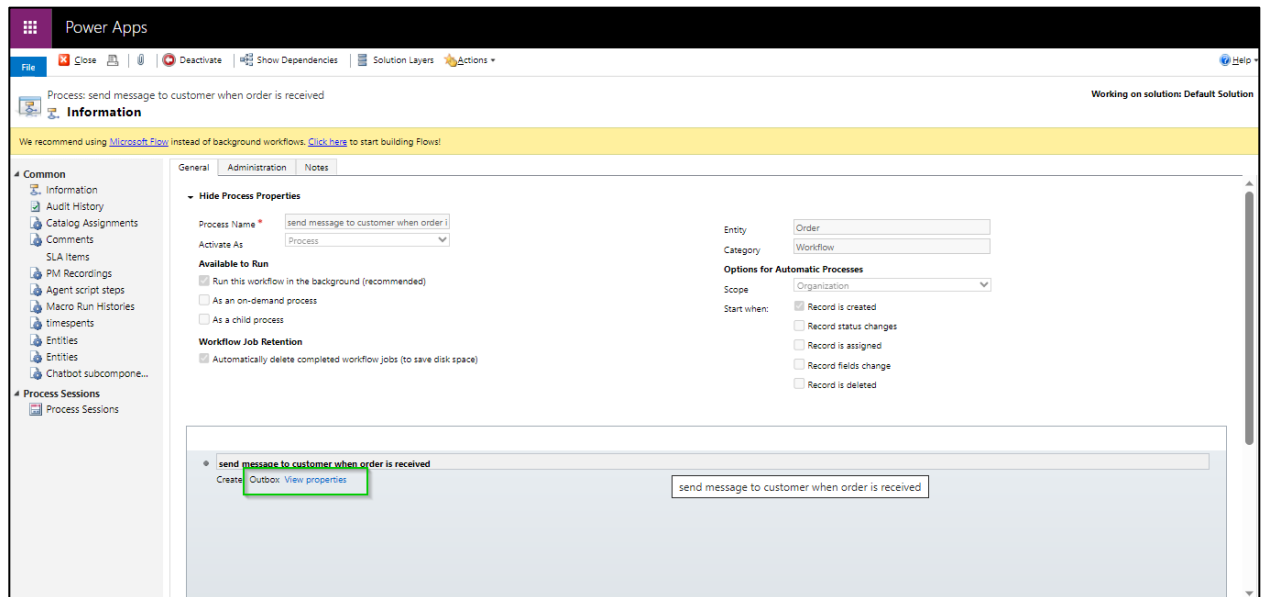
Please Note: Users can set multiple trigger points, depending on their requirements and workflows. Each trigger that you create for a selected Entity can have a customized template.

- A new window will pop up when you click on **Set Properties**, as shown in the screenshot below.
- You need to enter the details like **Name**, **Message Template, From** (the configured number) and **Regarding** as well as **To** Entities as per your requirements.
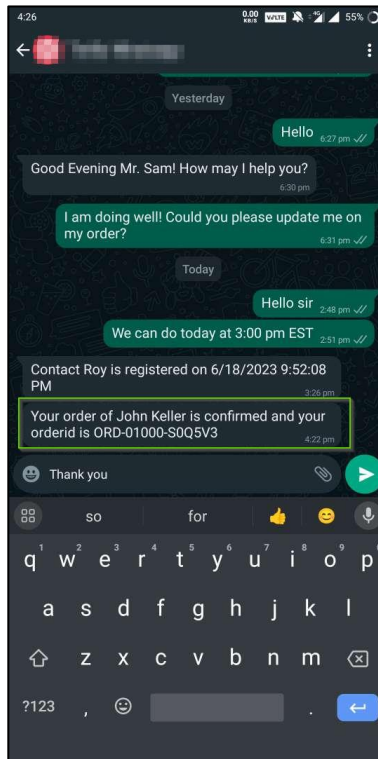- Once done, **Save and Close** the workflow.
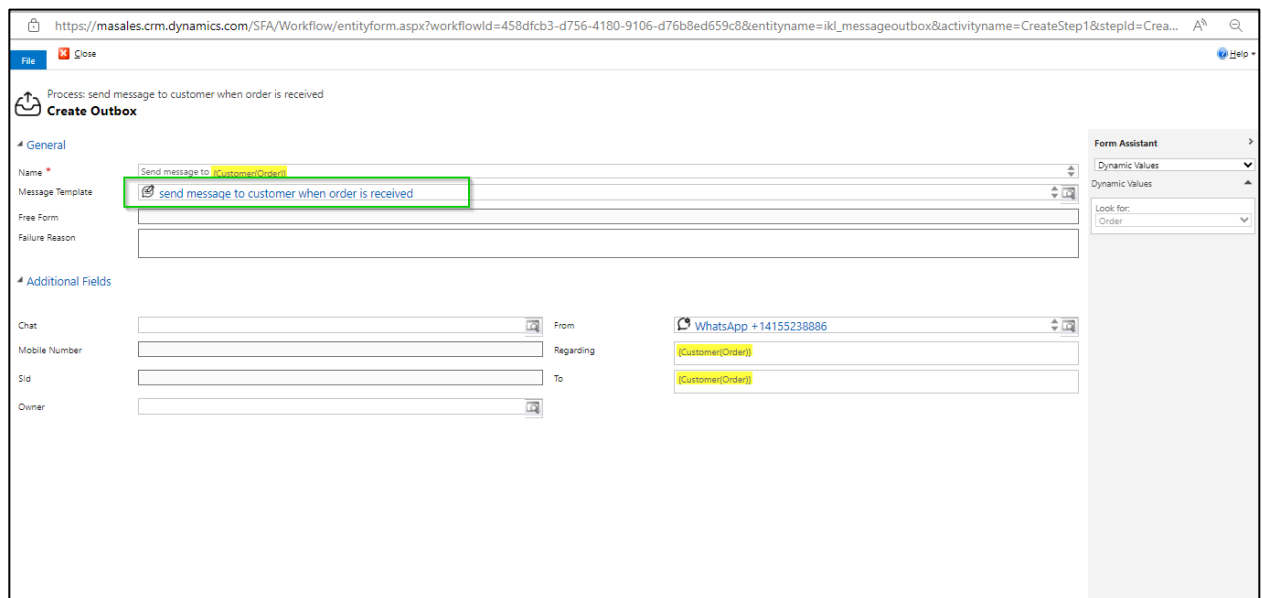
- Users can choose the preferred **Message Template**. If not created, follow this link to know how to **Configure & Create Message Template**.
- Once added, click **Activate**.
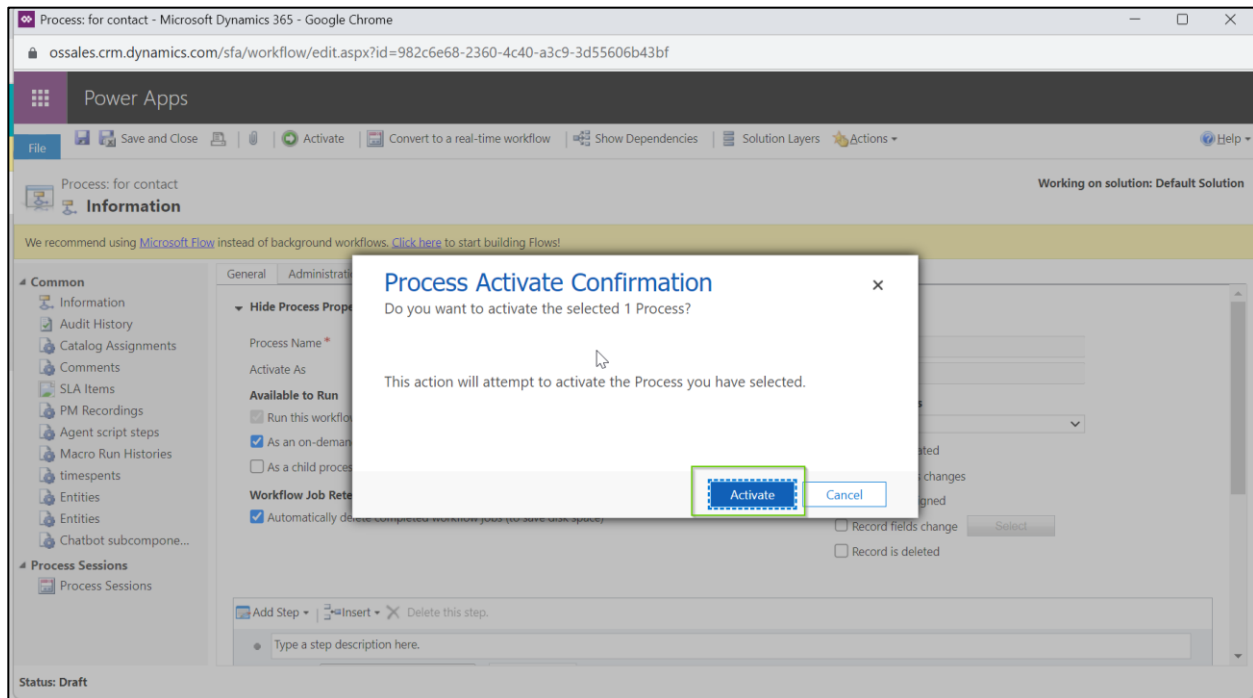
Once trigger is activated, the messages will be automatically sent on order confirmations, appointment reminders etc. as shown in the screenshot below.


FAQs

How to configure senders?

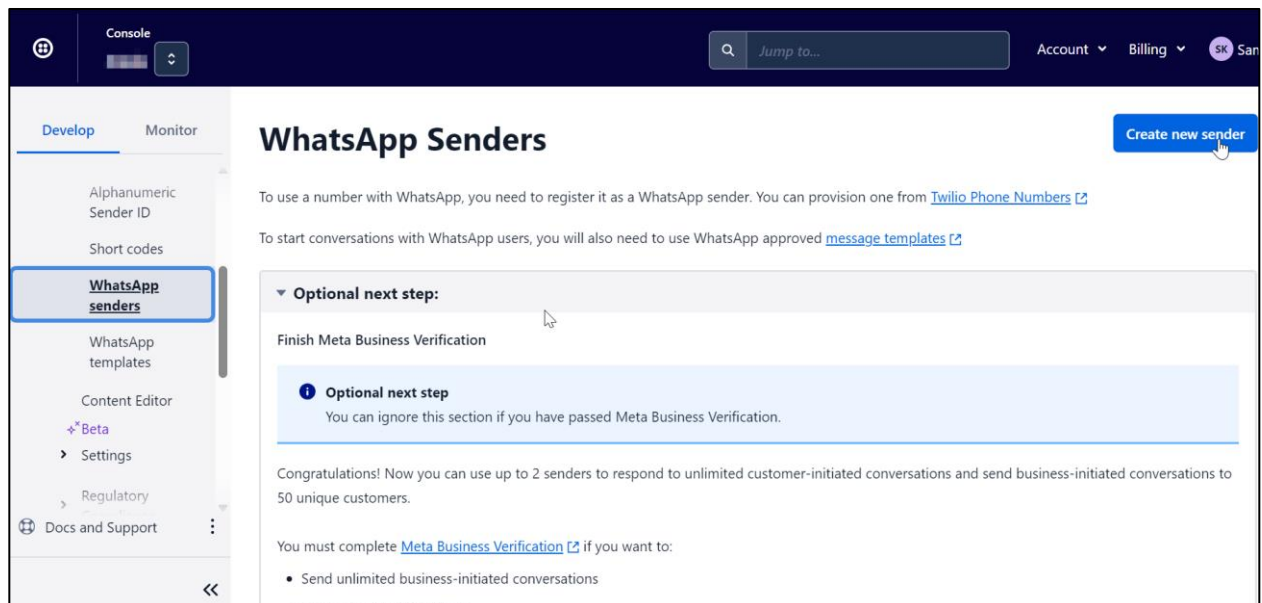Now let's look at how to configure a sender from a paid account.

Sender represents the phone number/ **verified WhatsApp Business Account** that you want to use as the **Sender ID**.

Twilio allows you to associate multiple senders with a single Messaging Service. However, to use WhatsApp4Dynamics you can currently add only one number.

- **Access the Twilio Console:** Go to the Twilio website and log in to your account. Navigate to the Console dashboard.
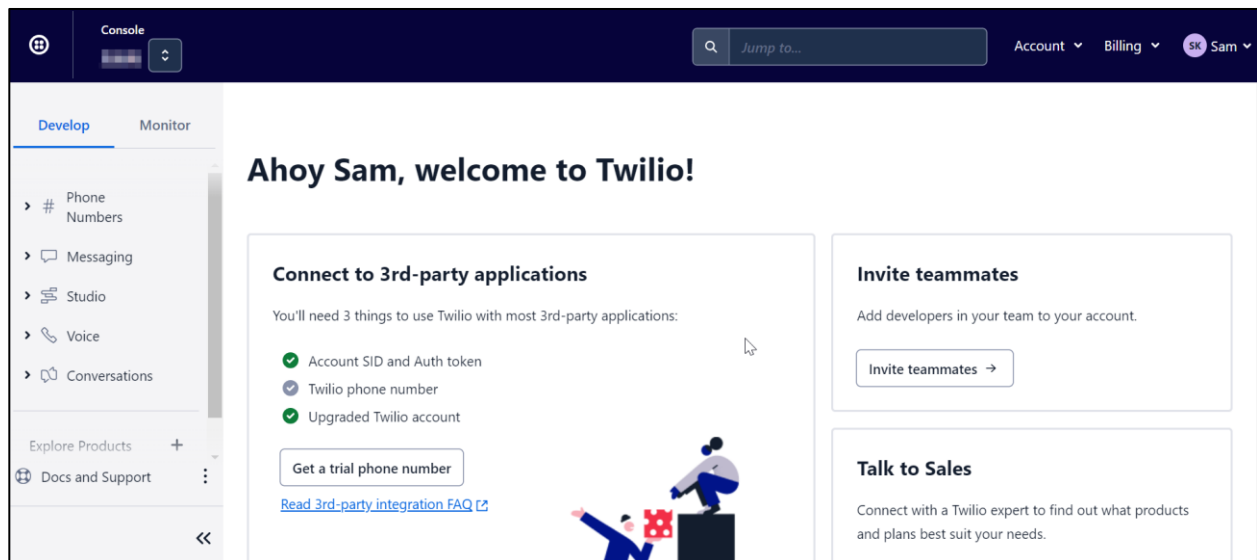
- **Add a Sender:** Go to messaging -> Senders -> WhatsApp Senders
- Click on Create New Sender

- Select **My Own phone number** and click continue.

- In link **your WhatsApp Business Account**, click on **Continue with Facebook**

For more clarification or to get a guided view, visit Twilio Help Docs here.

What are the accepted content types for media on Twilio?

In case of multiple message, Twilio doesn't guarantee that messages will be sent in a particular sequence. Also, as WhatsApp4Dynamics integrate WhatsApp Business Account with CRM using Twilio API. Hence, only messages sent from the CRM will be synced / stored in the CRM chat conversation.

Likewise, large text over character limit 1600 and text file (.txt) are not supported by Twilio.
For more information on this follow this link.

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