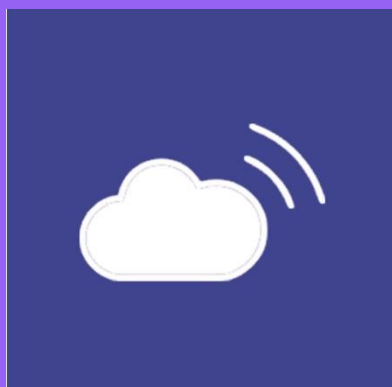




Audite Cloud | Power Omnichannel

THE POWER APPS DIGITAL CUSTOMER SERVICE
INSTALLATION AND FIRST SETUP GUIDE





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Introduction

Audite Cloud | Power Omnichannel is one of the most Microsoft-centric digital customer service solution on the market.

Native to Microsoft Power Apps and Dynamics 365 environment, Audite Cloud | Power Omnichannel lets you leverage out-of-the box Microsoft Customer Service, Sales or Marketing solutions.

With Audite Cloud | Power Omnichannel, companies can transform any Social Messaging system into a powerful corporate communication system, providing customer service operators with advanced tools for customer support.

In this guide are described the needed steps that your tenant's administrator has to follow in order to correctly install and setup Audite Cloud | Power Omnichannel. All the steps described in the following sections are a necessary precondition to correctly use Audite Cloud | Power Omnichannel in your Power Apps and Dynamics 365 environment.



Step 1 – Install the Channel Integration Framework

Audite Cloud | Power Omnichannel, in order to be correctly installed, needs the Channel Integration Framework v1 to be installed too.

Then, Channel Integration Framework (from now on, CIF) needs to be installed in your environment before importing the solution (step 2).

To do it:

- Go to <https://admin.powerplatform.microsoft.com/>
- Access the environment where to perform the CIF installation (same environment where, at step 2, will be imported Audite Cloud | Power Omnichannel solution)
- In **Resources** section, select **Dynamics 365 apps**

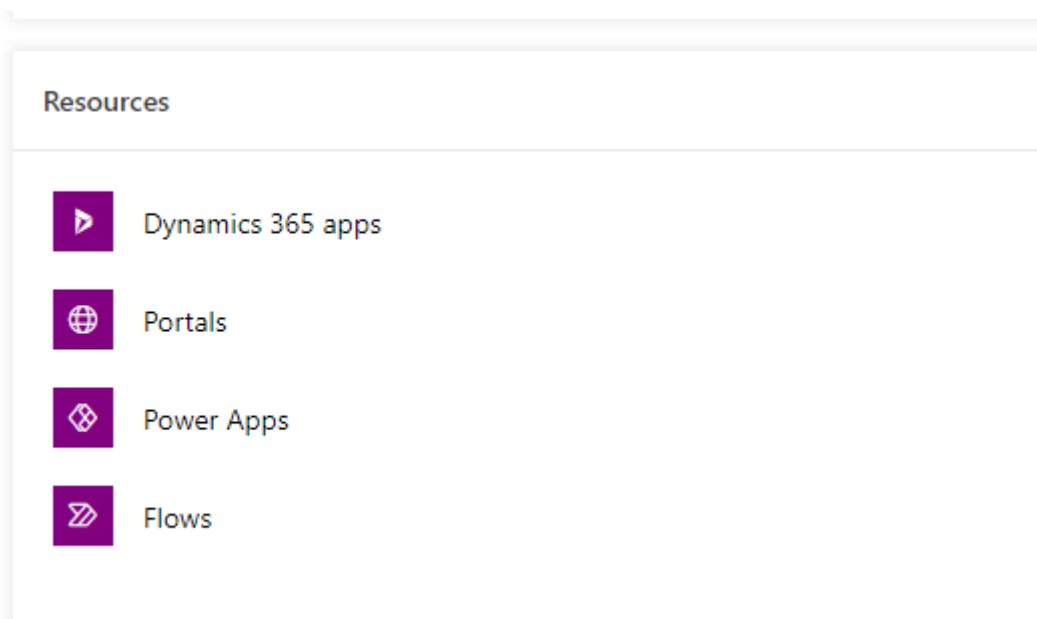


Figure 1 - Resources: Dynamics 365 apps

- Click on **Install app** button. It will be opened a right-sided panel where to search the Dynamics 365 app to be installed



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The screenshot shows the Power Platform admin center interface. On the left, the 'Dynamics 365 apps' section is active, displaying a table of installed and available apps. On the right, the 'Install Dynamics 365 apps' pane is open, showing a list of apps to be installed.

Name ↑	Status	Publisher
Agent Productivity Tools	Update available	Microsoft Dynamics 365
App profile manager	Update available	Microsoft Dynamics 365
Dynamics 365 Channel Integration Framework	Installed	Microsoft Dynamics 365
Dynamics 365 Contextual Help	Installed	Microsoft Dynamics 365
Dynamics 365 Customer Voice	Installed	Microsoft Dynamics 365
Dynamics 365 Service Scheduling	Update available	Microsoft Dynamics 365
Environment variables	Installed	Microsoft Dynamics 365
Microsoft Flow Extensions	Installed	Microsoft Dynamics 365
IData v4 Data Provider	Installed	Microsoft Dynamics 365

Name ↑	Status
AI Builder for Project Cortex	Enabled
Business Central Virtual Table (Preview)	Enabled
Customer Insights customer card add-in (Preview)	Enabled
Customer Service Team Member	Enabled
CVA Solution	Enabled
DocuSign for Dynamics	Enabled
Dual-write application orchestration solution	Enabled
Dual-write core solution	Enabled
Dynamics 365 Connector for LinkedIn Lead Gen Forms	Not Configured
Dynamics 365 Connector for LinkedIn Lead Gen Forms ...	Configured
Dynamics 365 for Field Service	Enabled

Figure 2 - Install Dynamics 365 apps

- Search for **Dynamics 365 Channel Integration Framework**. Select the app and click to **Next** in order to perform the installation
- App installation process will be started. Once completed (it takes few minutes), you will find the CIF into your **Dynamics 365 apps** grid with status *Installed*

Step 2 – Import Audite Cloud | Power Omnichannel solution

Second step that you, as Power Apps and Dynamics 365 tenant's administrator, have to follow is to import Audite Cloud | Power Omnichannel solution in your environment.

To do it:

- Go to <https://make.powerapps.com/>
- Select the correct environment where to import the solution
- Click on **Import Solution**
- **Browse** the solution to be imported and start the import process

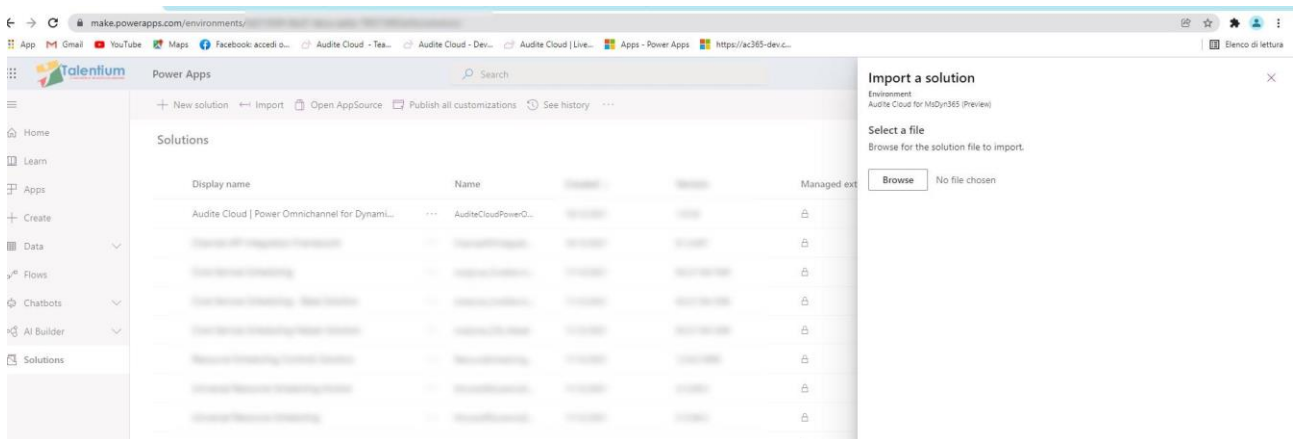


Figure 3- Import the solution

Once imported, you will find Audite Cloud | Power Omnichannel listed into the **Solutions** grid of the installation environment.

Step 3 – Create CIF configuration record

To work correctly with Audite Cloud | Power Omnichannel, it must be created a configuration record for the CIF.

To do it:

- Start **Channel Integration Framework** app
- Select **Channel Providers** and click on + New
- It will be opened a creation form where to create the Channel Providers record

New Channel Provider - Unsaved

Channel Provider Configuration

Name *	---
Label *	---
Channel URL *	---
Enable Outbound Communication *	No
Channel Order *	---
API Version	1.0
Trusted Domain	---
Custom Parameters	---

Select Unified Interface Apps for the Channel

Enter text here

Select the Roles for the Channel

Enter text here

Figure 4 - Channels Providers' record creation

- Insert all the needed information to create this record. In particular:
 - **Name**, name of the channel provider, e.g. Audite Cloud
 - **Label**, label to be displayed as the title on the widget, e.g. Audite Cloud



- **Channel URL**, i.e. the URL of the provider to host in the widget, i.e. <https://auditorium.auditecloud.com?orgURL=ORGANIZATIONURL>. This "ORGANIZATIONURL" will be the same as the one inserted at [step 6](#) in the solution Configuration Page
 - **Enable Outbound Communications**, leave No
 - **Channel Order**, set 1
 - **API version**, leave 1.0
 - **Trusted Domain**, an additional domain if the initial landing URL and the final domain from which the communication widget is hosted are different. Add the domain (URL) to access the Channel Integration Framework APIs. Put same domain as Channel URL.
 - **Customer Parameters**, leave blank
- Moreover, you have to specify
 - The **Unified Interface Apps** for the channel, i.e. *Audite Cloud | Power Omnichannel*

Select Unified Interface Apps for the Channel

Audite Cloud | Power Omnichannel x

Enter text here

Figure 5 - Channels Providers' record creation: Apps for the channel

- The **Roles for the Channel**, i.e. *Audite Cloud Omnichannel Agent, Audite Cloud Omnichannel Admin, Audite Cloud Integration Service*



Select the Roles for the Channel

Audite Cloud Omnichannel Agent x

Audite Cloud Integration Service x

Audite Cloud Omnichannel Admin x

Enter text here

Figure 6 -- Channels Providers' record creation: Roles

Step 4 – Create an App Registration for Audite Cloud | Power Omnichannel

After having correctly imported the solution in your environment, create on your Active Directory an app registration for Audite Cloud | Power Omnichannel.

To do it:

- Login into [Azure Portal](#)
- Search for **App Registrations** and click on **+New Registration** (same section is also accessible from **Active Directory > App Registrations**)
- Insert the needed information to create it, i.e.
 - **Name:** specify a display name for the application
 - **Account Type:** choose *Single Tenant*
 - Redirect URI: leave blank

and click on **Register** button



[Home](#) > [App registrations](#) >

Register an application ...

* Name

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (AuditeCloud only - Single tenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- ☐ Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web

▼

e.g. https://example.com/auth

Figure 7 - App Registration on Azure

- As outcome of this action a new app registration will be created. Azure AD assigns a unique application (client) ID to your app and displays your application's Overview page. Take note of your **Application (Client) Id** that will be later used in the next steps

[Delete](#) [Endpoints](#) [Preview features](#)

Essentials

Display name : Audite Cloud

Application (client) ID : 3ce5f...

Object ID : 253a...

Directory (tenant) ID : 715d...

Client credentials : [Add a certificate or secret](#)

Redirect URIs : 2 web, 2 spa, 0 public client

Application ID URI : [Add an Application ID URI](#)

Managed application in I... : Audite Cloud

Figure 8 - Application (Client) Id

- Moreover, create a **Secret ID** for the just registered app in **Certificates & Secrets** section. In order to do it, click on **+New client secret** button.



In the right-sided panel insert:

- o a **description** for the secret
- o a custom **expiration date**, e.g. 12/31/2299 for the end date (i.e. no expiration)

Add a client secret [X]

Description: Enter a description for this client secret

Expires: Custom [v]

Start: MM/DD/YYYY [calendar icon]

End: MM/DD/YYYY [calendar icon]

Figure 9 - Add a Client Secret

- Like the Application (Client) Id, take note of the just generated **Secret ID** that will be later used in the next steps

Step 5 – Create an Application Service User for Audite Cloud | Power Omnichannel

It must be created an application service user that will allow the Power App to access Audite Cloud's backend services.

To create an application service user:

- Sign in to the [Power Platform admin center](#) as a System Administrator
- Select **Environment** and then select the right environment from the list
- From **Access** section, select **Users**. The system view page, where users configuration can be done, appears (or select **S2S Apps** to go directly and skip the next step).



Access

Security roles

[See all](#)

Teams

[See all](#)

Users

[See all](#)

S2S Apps

[See all](#)

Figure 10 - Access section

- Switch to **app user list** clicking on the related link

Power Platform admin center

[+ Add user](#) [Refresh](#) [Manage users in Dynamics 365](#)

Environments > Audite Cloud for MsDyn365 (Preview) > Settings > **Users**

Manage users so they can access data within their environment. This list includes users with disabled and enabled statuses. [Learn more](#)

Looking for application users? Click here to go to the [app users list](#)

To validate user permissions for specific app(s), go to [app access checker](#).

Figure 11 - App User List

- Click on **+ New app user** button
- Click on **+Add an app** and select the app for which you are creating the application user (the one in the previous step). Once selected, click on **Add**. The selected Azure AD app is displayed under **App**



Audite Cloud | Power Omnichannel

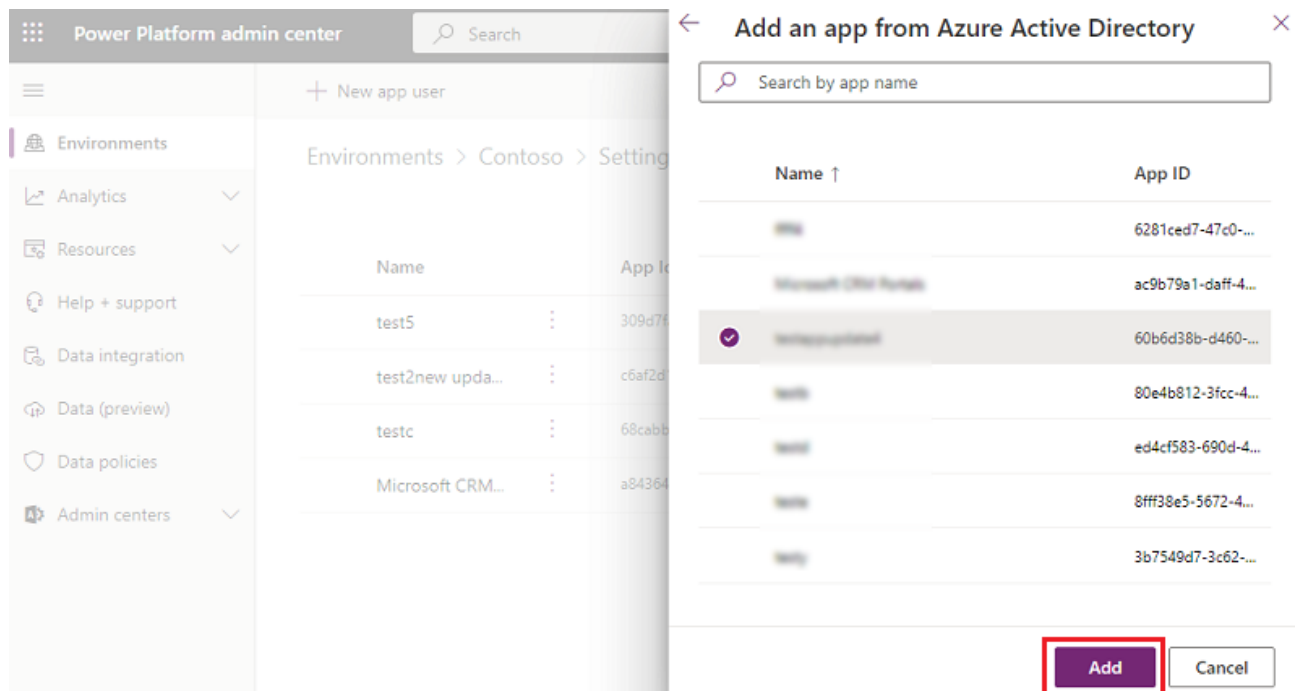


Figure 12 - Application Service User Configuration: add an app

- Select the **Business Unit** from the drop-down list

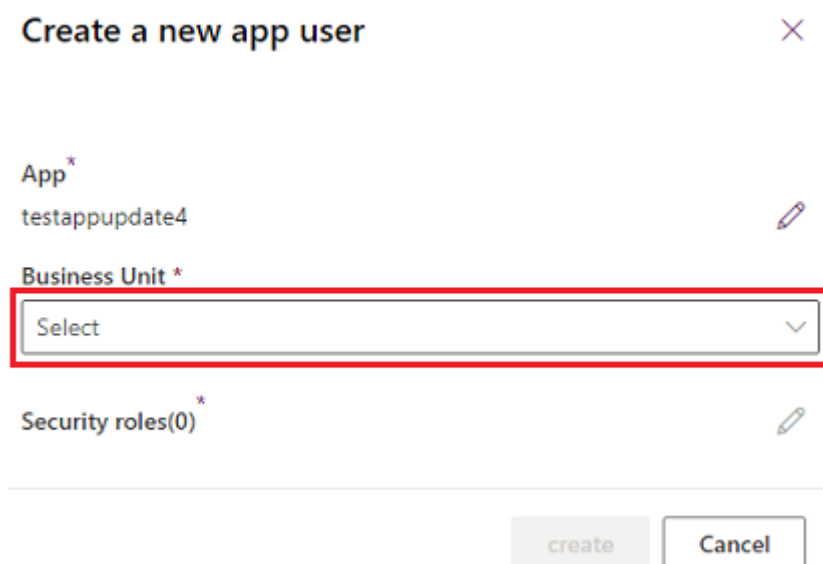


Figure 13 - Application Service User Configuration: Business Unit

- Edit the Security Roles, adding for the application user you are just creating **Audite Cloud Integration Service** role. Click on Save.



← Add security roles

Business unit: *

orgf7a7df38

Role ↑
Activity Feeds
AIB Roles
AIB SML Roles
App Profile Manager Administrator
App Profile User
☒ Audite Cloud Integration Service
Audite Cloud Omnichannel Admin
Audite Cloud Omnichannel Agent
Audite Cloud Omnichannel Test Drive
Basic User
BizQAApp
Bot Author
Bot Contributor
Bot Transcript Viewer
BusinessApplicationPlatformRole
CCI admin

Save Cancel

Figure 14 - Application Service User Configuration: Security Roles

- Once security role has been added, click on **Create**

Step 6 – Solution Configuration Page: Start Resources Deployment

Last step, in order to trigger the allocation of the resources needed by your organization, is to specify, into a Configuration Page, some parameters that are needed to this purpose.

To do it:



Audite Cloud | Power Omnichannel

- Access the **Configuration Page** and start the deploy for your organization. This configuration page will be available into the **Overview** section of your installed Audite Cloud | Power Omnichannel Solution. Click on View page link under the **Configuration Page** attribute

Power Apps Overview

Details

Display name	Package type	Description
Audite Cloud Power Omnichannel for Dynamics 365	Managed	
Name	Publisher	
AuditeCloudPo...	Talentium	
Created on	Patch	
Dec 16, 2021 6:11 PM	No	
Version	Configuration page	
1.0.0.8	View page	

Recent items

Display name	Name	Type
Audite Cloud Omnichannel Agent	Audite Cloud Omnichannel Agent	Security Role
Audite Cloud Power Omnichannel	cr4cb_AuditeCloud	Model-Driven App
Audite Cloud Integration Service	Audite Cloud Integration Service	Security Role
Audite Cloud Omnichannel Admin	Audite Cloud Omnichannel Admin	Security Role
AuditeCloud_SocialChannel	AuditeCloud_SocialChannel	Service Endpoint

Configuration page

audite cloud

Welcome to Audite Cloud.

Transform Power Platform into the most powerful and versatile Contact Center platform by adding Social Messaging & Conversational AI capabilities.

Logout has been successfully completed

Sign in

Close

Figure 15 - Solution Overview: Configuration Page sign-in

- **Sign in** into the Configuration Page. This is needed to automatically retrieve some parameters needed for resource allocation (see the next step)
- Insert the needed configuration parameters to start the provisioning of the resources for your organization. In particular, the needed information to correctly setup your environment is:
 - **Subscription Id:** Unique identifier of your Audite Cloud | Power Omnichannel subscription. To be manually set
 - **Organization URL:** Instance URL of Dynamics 365 environment. To be manually set
 - **Tenant id:** automatically retrieved and not shown to the user as input parameter
 - **Application (Client) Id:** the one created at the [fourth](#) step. To be manually set
 - **Secret ID:** the one created at the fourth step. It can be found in the App registration > Certificates & secrets section. To be manually set
 - **Application User Id:** automatically retrieved and not shown to the user as input parameter



Configuration page ×

👤

Hi, welcome to Audite Cloud, we will guide you through the application setup.

Below are the needed steps your tenant's administrator has to do in order to correctly setup Audite Cloud - Power Omnichannel solution:

- ▶ Create an application registration on Azure
- ▶ Create an application user into Audite Cloud Power App and configure its role.
- ▼ Setup and deploy your Audite Cloud organization.

Having trouble following the steps? Go to [the complete user manual](#).

Figure 16 - Configuration Page details

Organization deploy will actually start when the form will be submitted, after clicking on **Submit** button. A confirmation message about the correct setup of the organization's resources will be returned to the administrator when this setup is done. Once submitted, this information cannot be modified (they become read-only), if the setup went fine. Otherwise, there will be the possibility to edit and submit the form again. In particular, there are several scenarios for which the resource allocation process may fail. They are the following:

Error Code	Error Description
D001	Invalid Application Id
D002	Invalid Secret
D003	Invalid PowerApp Url
D004	Invalid Tenant Id



D005	Unauthorized, check PA Url or application user roles
D006	Application user not found
D007	Channel Integration Framework not found

A user-friendly message will be returned to the user if one of the above-mentioned events occur.

Step 7 – Activate Processes

Ensure that the following processes are activated in Audite Cloud | Power Omnichannel:

- OmnichannelSession_CaseUpdate
- OmnichannelSession_CustomerUpdate
- OmnichannelSession_PostClose
- OmnichannelSession_PostCreate

In order to activate the above-mentioned processes, in your Audite Cloud | Power Omnichannel Power App go to **Advanced Settings > Processes** (under **Process Center** section).

You will find each process in *Draft* status: to activate, click on **Activate** button in the command bar.

Repeat this activation step for all these four processes.



File Save and Close Activate Convert to a background workflow Show Dependencies Solution Layers Actions Help

Process: OmnichannelSession_CaseUpdate Working on solution: Default Solution

Information

Common

- Information
- Audit History
- Catalog Assignments
- PM Recordings
- Comments
- Agent script steps
- Macro Run Histories
- Chatbot subcompone...

Process Sessions

- Process Sessions

General Administration Notes

Hide Process Properties

Process Name *

Entity

Activate As

Category

Available to Run

☐ Run this workflow in the background (recommended)

☐ As an on-demand process

☐ As a child process

Workflow Log Retention

☒ Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope

Start when: ☐ Record is created

☐ Record status changes

☐ Record is assigned

☒ Record fields change

☐ Record is deleted

Execute as:

☒ The owner of the workflow

☐ The user who made changes to the record

Figure 17 - Process Activation