



# User Guide

Fuze Connect for MS Dynamics 365 Cloud

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# Introduction

Fuze Connect is a desktop application which automatically looks up MS Dynamics 365 Cloud data during a call, to give you the information you need about the caller at a glance.

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## Getting Started

Fuze Connect is offered as a desktop application. To install Fuze Connect on your computer, you can download the executable from Fuze servers.

1. Open your web browser and navigate to the Fuze Connect download link:
  - <https://fuzeconnect.gts.fuze.com/>

Your browser should automatically download the Mac or Windows installer that is specific to your platform.

2. Open the downloaded Fuze Connect installer, and follow the installation instructions.



## Initial Setup

Perform the following actions to set up Fuze Connect with MS Dynamics 365 Cloud

- Once installation is complete, you may start Fuze Connect.
- On first run, you will need to log in to your Fuze account.
- On this screen, enter your **Fuze User ID** and click **Next**.
- Depending on your account settings, you will either be prompted for your **Fuze Password**, or redirected to your **authentication provider** to complete your login.



### Welcome

Enter your username or e-mail to sign in

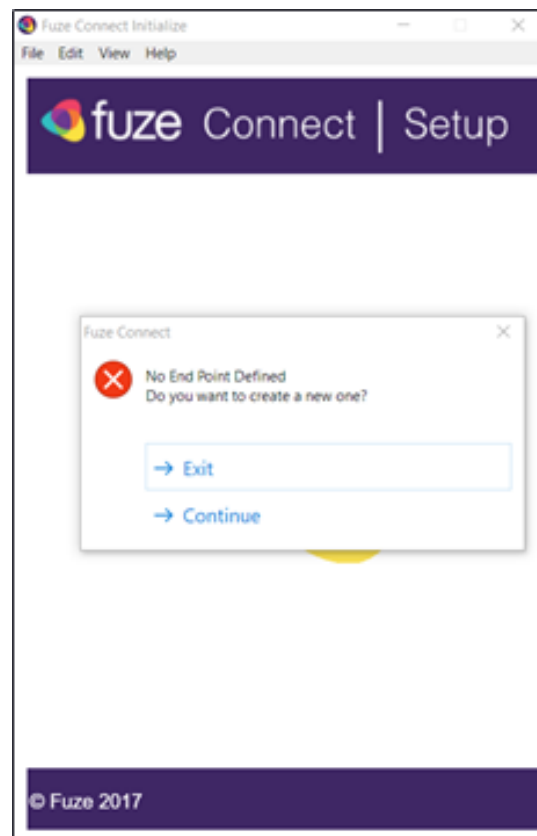
NEXT

Forgot your [username](#) or [password](#)?

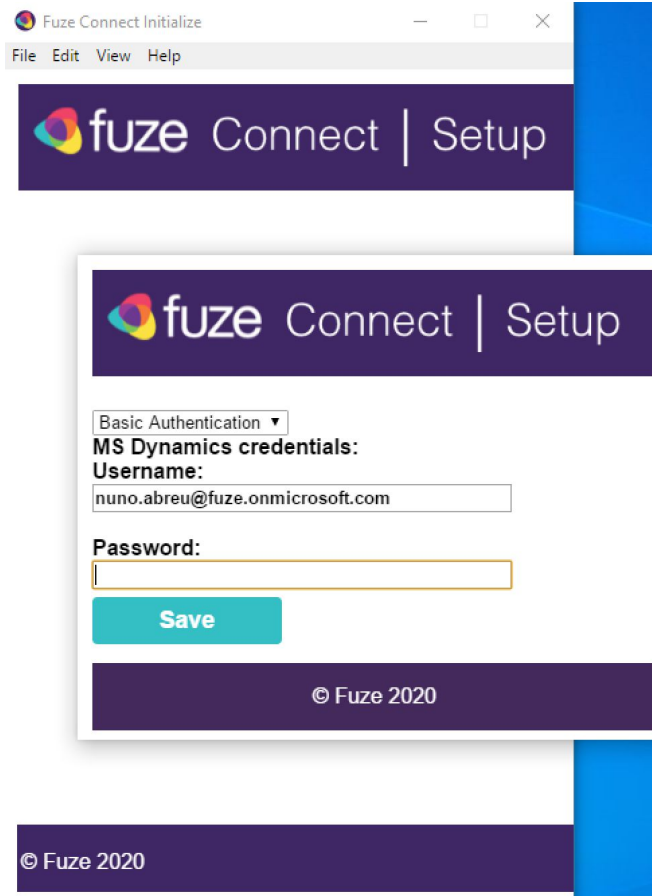
## Authorizing MS Dynamics 365 Cloud

Once you log in with your Fuze account, additional authentication will be required to complete the connection between Fuze and MS Dynamics 365 Cloud.

**If you receive the following message, you must authorize your connected MS Dynamics 365 Cloud integration before you can use Fuze Connect:**

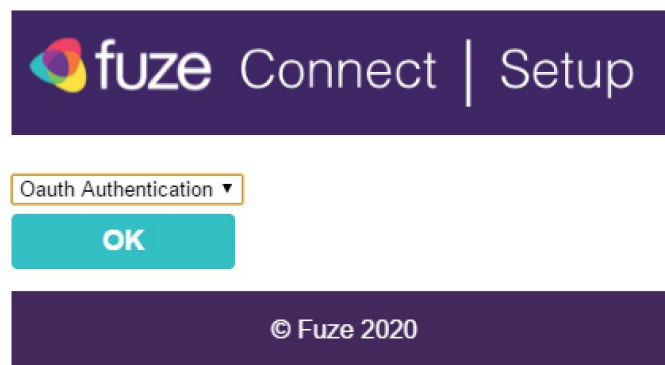


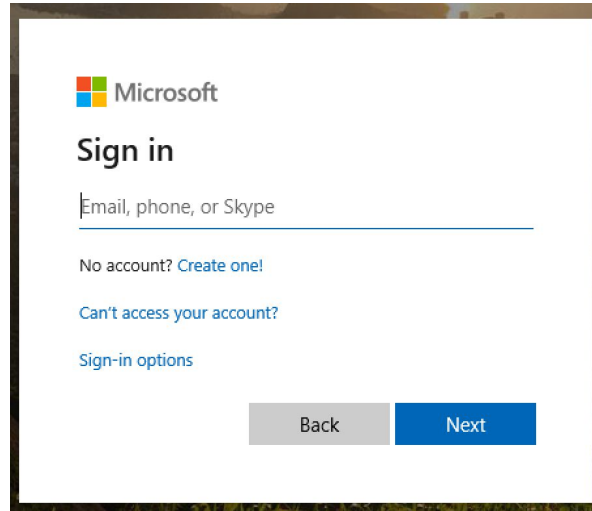
1. Click **Continue** to proceed to the next prompt



1.1 On this screen you can enter your MS Dynamics 365 Cloud username/password to authenticate and press Save.

1.2 You can also change the authentication method to Oauth and press OK so you can authorize the application logging in to dynamics on your default browser.





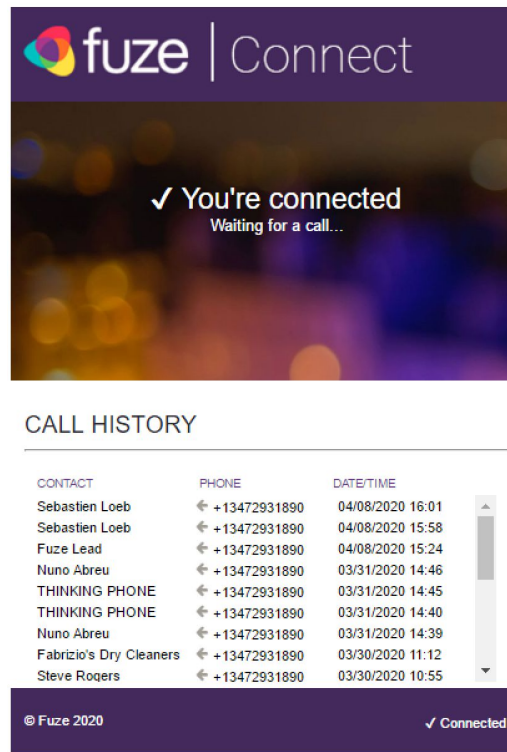
1.2.1 If necessary, log in to your MS Dynamics 365 Cloud. In some cases a screen asking for authorization for Fuze Connect to be able to access MS Dynamics 365 Cloud may appear and user should accept it.

2. After Fuze Connect validates the username/password or after the Oauth2 process is finished a Fuze Connect landing page will appear on the browser.

Once your MS Dynamics 365 Cloud instance authorizes Fuze Connect, you can begin using Fuze Connect right away.

## Idle Screen



While you are not on a call, Fuze Connect will display the following Idle Screen:



### *Fuze Connect Idle Screen*

The idle screen shows the connection status of Fuze Connect.

Below the status text and image is the Call History, which shows all calls made or received while Fuze Connect was open and active.

- A **left arrow**  indicates an **Inbound Call**.
- A **right arrow**  indicates an **Outbound Call**.

Clicking on a record in the Call History will dial that contact at the number shown.

*Calls initiated in this way will be made using your preferred Click to Call device, as configured in the Fuze Customer Portal.*



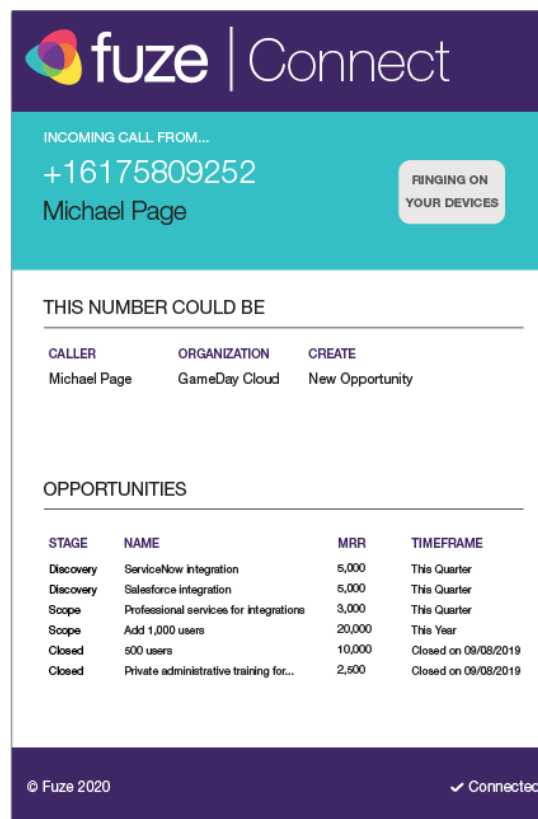
## Inbound / Outbound Calls

On an incoming or outgoing call, the Connector will present relevant information by performing a lookup in your connected MS Dynamics 365 Cloud environment based on the caller's phone number and Caller ID.

Once the lookup is complete, a table will be displayed which shows relevant data.

Fuze Connect will attempt to match the phone number to contact/leads/accounts in the connected MS Dynamics 365 Cloud environment.

Entities matched will be displayed in the primary area if found. When there is a match, the integration will display related opportunities when available.



The screenshot displays the Fuze Connect interface. At the top, it shows the Fuze logo and the text 'fuze | Connect'. Below this, it indicates an incoming call from the number +16175809252, identified as Michael Page. A button on the right says 'RINGING ON YOUR DEVICES'. The main section is titled 'THIS NUMBER COULD BE' and contains a table with the following data:

CALLER	ORGANIZATION	CREATE
Michael Page	GameDay Cloud	New Opportunity

Below this table, there is a section titled 'OPPORTUNITIES' with another table:

STAGE	NAME	MRR	TIMEFRAME
Discovery	ServiceNow integration	5,000	This Quarter
Discovery	Salesforce integration	5,000	This Quarter
Scope	Professional services for integrations	3,000	This Quarter
Scope	Add 1,000 users	20,000	This Year
Closed	500 users	10,000	Closed on 09/08/2019
Closed	Private administrative training for...	2,500	Closed on 09/08/2019

At the bottom of the interface, it shows '© Fuze 2020' on the left and a 'Connected' status with a checkmark on the right.

*Incoming call info*

## On-Call Actions

The following actions can be performed on the associated data in Fuze Connect while on a call:

- Click on the **Caller Name** to open that contact in your connected MS Dynamics 365 Cloud.
- Click on the **Opportunity** listing to automatically open that record in your connected MS Dynamics 365 Cloud.
- Click on the **New Opportunity** link to create a new opportunity associated to the contact and open it on a new window on MS Dynamics 365 Cloud.

## Call Notes and Wrap-Up

When the call ends, a Notes window will be opened for the user to be able to add call notes related to the contact/lead/account of the call and select a Wrap-Up code. If an opportunity or a new opportunity link is clicked, then the phone call entry is also associated with that opportunity.

Call notes will also include a link to the associated call recording link. NOTE: Call recordings are stored on the Fuze platform for a defined amount of time, currently 60 days. If a user clicks on a call link for a call that is older than this defined time, they will receive an error or notification that the link is expired.



The screenshot shows the 'Fuze Call Wrap-Up' interface. At the top, there is a dark purple header with the Fuze logo and the text 'fuze Call Wrap-Up'. Below the header, there is a section for selecting a wrap-up code. It says 'Select a Wrap Up Code:' followed by a dropdown menu currently showing 'Fuze Meeting'. To the right of this, the call details are displayed: 'Miguel Oliveira' and '2018-11-20 16:46:02'. Below the dropdown, there is a text area labeled 'Call Notes:' containing the text 'Need to set a meeting with Miguel for next week!'. At the bottom of this section is a teal 'Save' button. The entire interface is set against a dark purple background, and a footer at the bottom reads '© Fuze 2018'.

*Call Wrap-Up Window, displayed after each call if enabled*

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