



 Documentation Vocalcom

MS Dynamics 365 integration

Installation guide

HUCC 6.3.2

 **VOCALCOM**

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Documentation last update: March 10, 2025

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Integration of HUCC into MS Dynamics 365 organization

Steps

You will find below a summary of the steps to follow to integrate HUCC into a MS Dynamics 365 organization:

1. Install the "Dynamics 365 Channel Integration Framework" plugin, to be able to add a call center to a MS Dynamics 365 organization.
2. Import the "HUCC_PackageDynamic" .zip file into your MS Dynamics 365 organization, to automatically create the user and phone call custom fields.

The user custom fields, once filled, allow the mapping between the agent created in Hermes and the user in MS Dynamics 365.

The phone call custom fields are automatically filled with statistics retrieved from calls.

3. Create and configure a call center.
4. Configure a user in MS Dynamics 365, by filling the custom fields.

These steps are detailed in the following sections.

After completing these steps, the user will be able to see the CTI toolbar in MS Dynamics 365, and use its features.

Prerequisites

Before proceeding to the configuration of Ms Dynamics 365, it is mandatory to respect the following prerequisites.

HUCC

It is necessary to have installed and configured HUCC.

For more information, you can refer to the specific guide.

Hermes

It is necessary to have created:

- an agent in Hermes, with their mail address,
- a station in Hermes.

MS Dynamics 365

It is necessary to have:

- Dynamics 365 9.1 and later,



For more information about system requirements, you can check [Microsoft Dynamics 365 documentation](#).

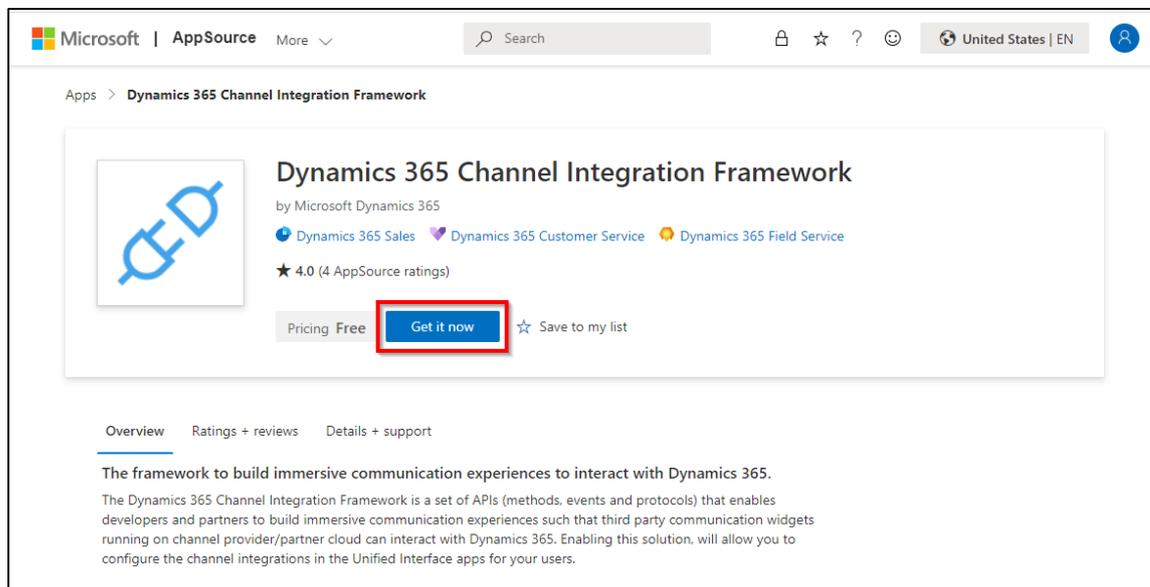
- created an organization in MS Dynamics 365.

1 - Install the "Dynamics 365 Channel Integration Framework" plugin

The "[Dynamics 365 Channel Integration Framework](#)" plugin allows to add a call center to MS Dynamics 365.

To install the "Dynamics 365 Channel Integration Framework" plugin:

1. Log-in to your MS Dynamics 365 organization.
2. Download the "Dynamics 365 Channel Integration Framework" plugin from the Microsoft AppSource, by clicking on the **Get it now** button.



3. Follow the installation steps.

You have installed the "Dynamics 365 Channel Integration Framework" plugin.

2 - Import the "HUCC" package specific to MS Dynamics 365

The import of the **HUCC_<version_name>** package specific to MS Dynamics 365 into your MS Dynamics 365 organization automatically creates the user and phone call custom fields.



Tip

You can find this package in the HUCC installation folder:

HUCC\ProxyHermesCRMPackages\MsDynamics.

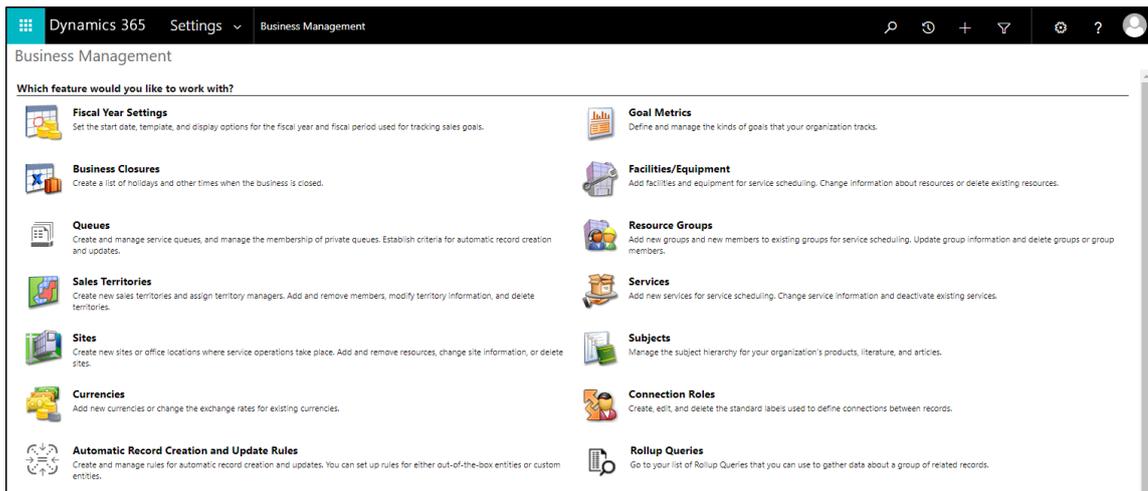
The user custom fields, once filled, allow the mapping between the agent created in Hermes and the user in MS Dynamics 365.

The phone call custom fields are automatically filled with statistics retrieved from calls.

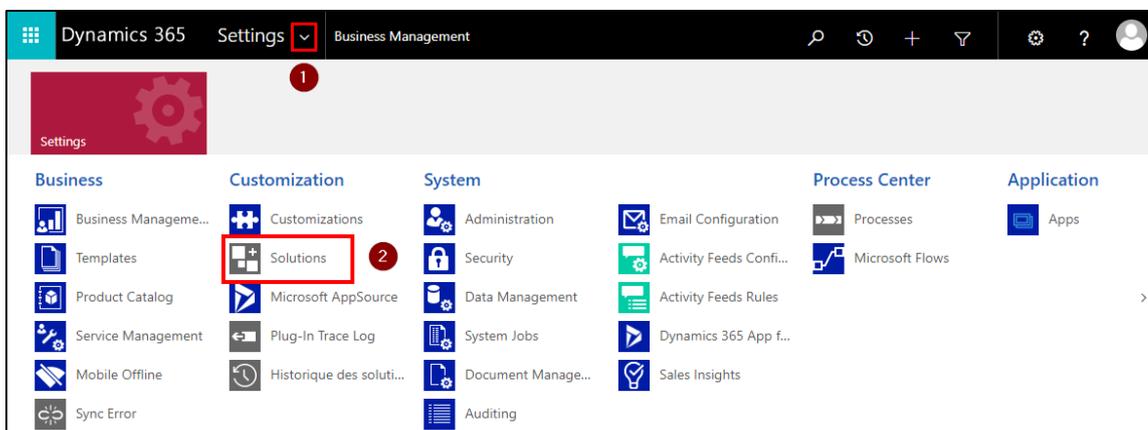
To import the **HUCC_PackageDynamic** package into your MS Dynamics 365 organization:

1. From your MS Dynamics 365 organization, access **Settings > Advanced settings**.

The configuration screen is displayed.

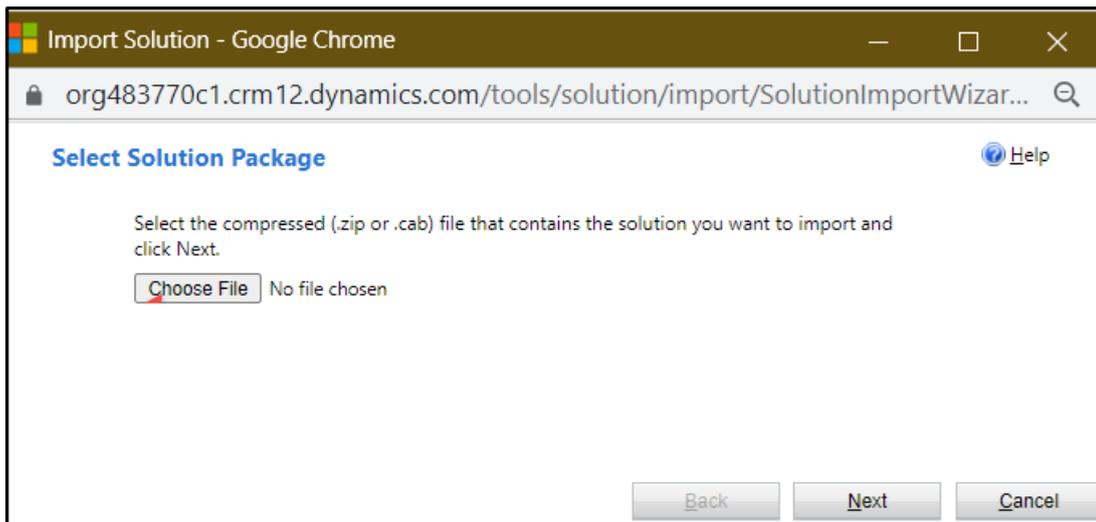


- In the banner, click the **arrow icon > Solutions**.



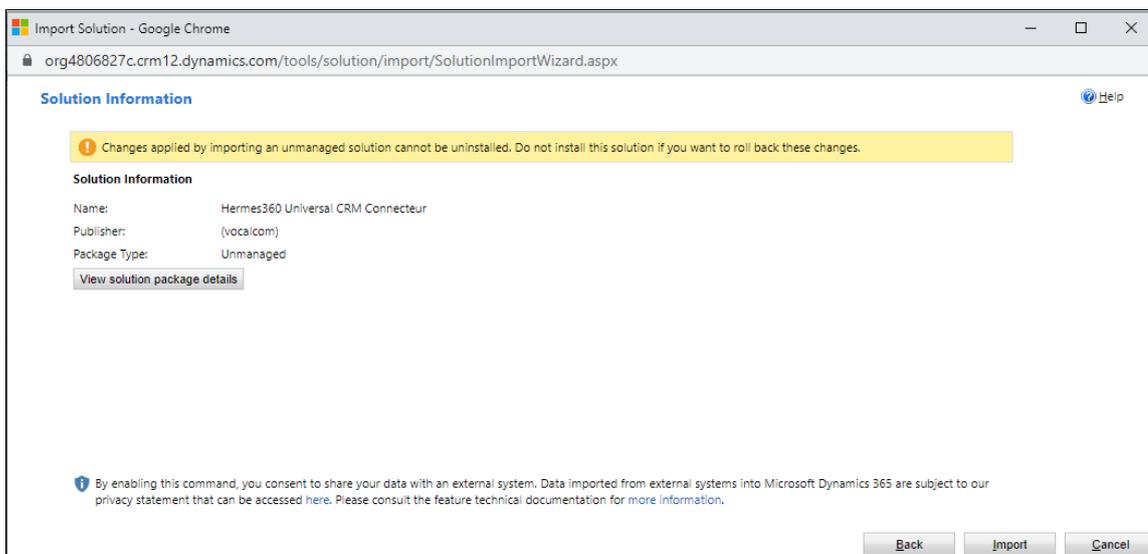
- Click the  **Import** icon.

The import wizard opens.



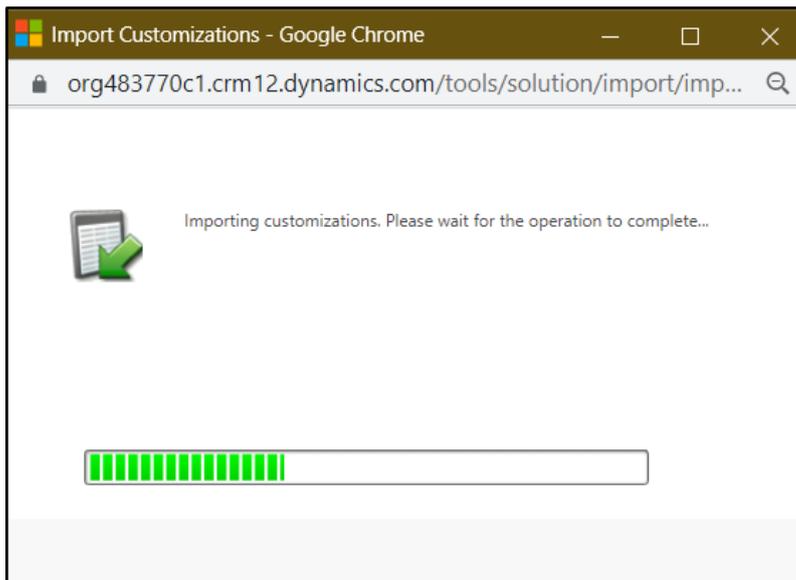
4. Select the MS Dynamics 365 **HUCC** package.
5. Click **Next**.

A window that summarizes the package to be imported opens.



6. Click **Import**.

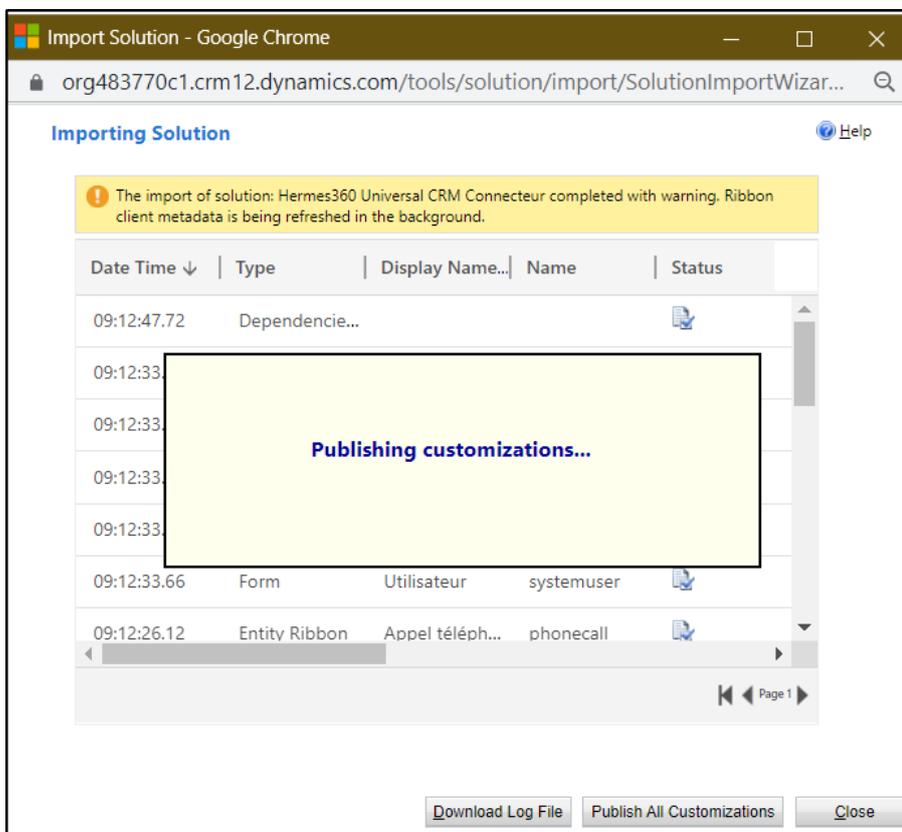
The package is being imported.



Once the import is completed, a confirmation message displays.

7. Click **Publish all customizations**.

The publication starts: the **Publishing customizations...** pop-up displays.



The publication is completed once the **Publishing customizations...** popup closes.

8. Click **Close**.

You have imported the **HUCC_PackageDynamic** package into your MS Dynamics 365 organization.

The "[Summary of the imported custom fields](#)" below section summarizes all the custom fields that have been created in your MS Dynamics 365 organization.

Summary of the imported custom fields

Below is a table where you can find a summary of the custom fields that have been imported. They have been added to the **Users** and **Phone call** entities.

The user custom fields, once filled, allow the mapping between the agent created in Hermes and the user in MS Dynamics 365.

The phone call custom fields are automatically filled with statistics retrieved from calls.

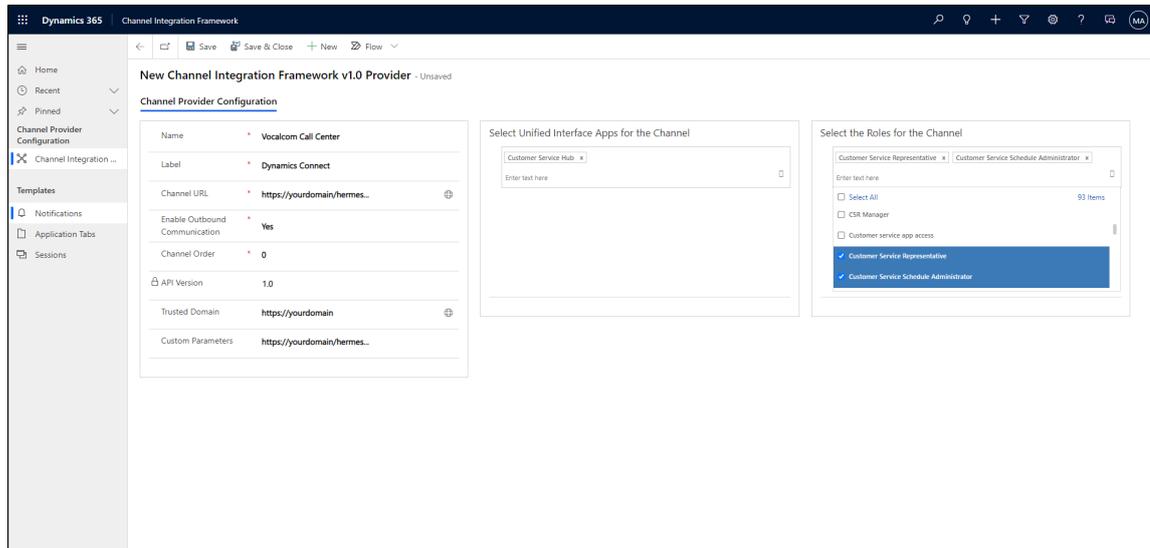
Entity	Name	Description
User	Username	Corresponds to the agent login, as defined in Hermes.
	Password	Corresponds to the agent's password, as defined in Hermes.
	Station	Corresponds to the station assigned to the agent.
	Created agent	Allows the user to access the CTI toolbar.

Entity	Name	Description
Phone call	Call ID	Allow to automatically retrieve statistics from phone calls: ID, campaign name, call start and stop times, etc.
	Campaign name	
	Call start time	
	Call stop time	
	Associated data	
	Data memo	
	Indice	

3 - Create and configure a call center

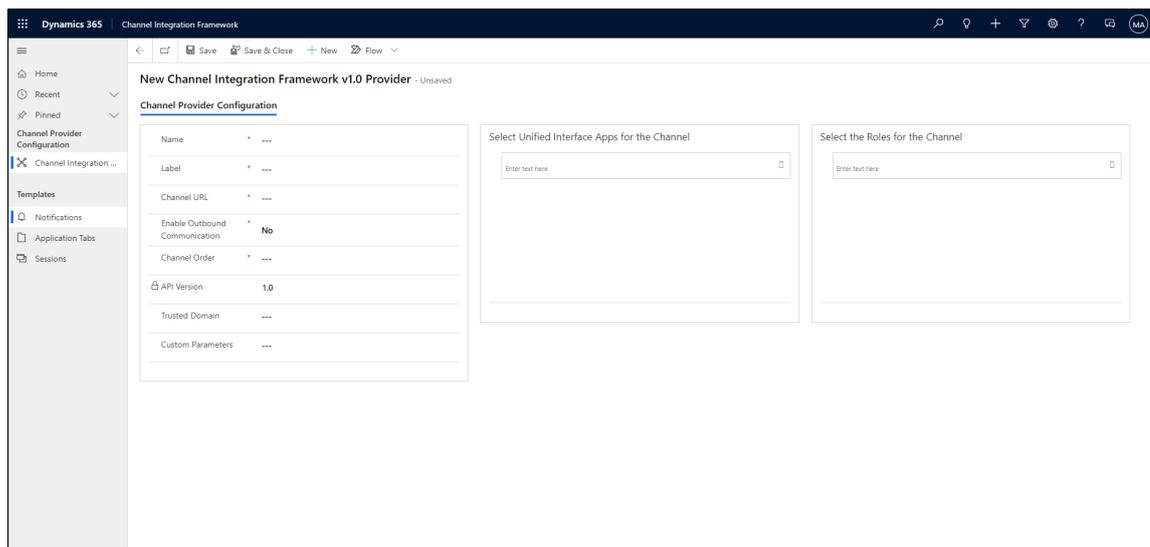
To create and configure a call center:

1. From your MS Dynamics 365 organization, access the **Channel integration framework** application.



2. Click the **New** button.

The call center creation page is displayed.



3. Fill the following fields, as described below:

- **Name:** Vocalcom Call Center

This name will be displayed in the CTI toolbar.

- **Label:** Dynamics Connect

- **Channel URL:**

Format: `https://@DNS@/HUCC/ProxyHermesFront/Standalone/language?`

`HUCCLoader=https://@DNS@/HUCC/ProxyHermesCRMPlugins/MsDynamics/MsDynamics.js`

Where:

- **@DNS@** corresponds to your DNS/IP server hosting the Hermes modules,
- **language** corresponds to the language of the CTI that you want to display,

For example: **en** for English language.
- **HUCCLoader** corresponds to the URL of the script that loads the CRM configuration (located in the **CRMPlugins** folder),

This is the URL that allows the loading of the toolbar.

- **Enable Outbound Communication:** Yes
- **Channel order:** 0
- **Trusted domain:** `https://{yourdomain}/HUCC/en`

Where “yourdomain” corresponds to your DNS/IP server hosting the Hermes modules.

For example: `https://10.0.2.65/HUCC/en`

- **Custom parameters:** corresponds to the URL that will allow the loading of the toolbar with its specific configuration. It differs slightly for Hermes v5 or Hermes 360:

- For **Hermes version 5:**

Format:

`https://@DNS@/HUCC/ProxyHermesConfig,ConfigurationCode,CustomerID,JSScriptURL`

Where:

- **@DNS@** corresponds to your DNS/IP server hosting the Hermes modules,
- **ConfigurationCode** corresponds to the code of the configuration block, displayed in the "ProxyConfig.xml".



```
<Proxy code="DemoDynamics">
  <UrlProxyWS>https://local.vocalcom.com/ProxyHermesWS</UrlProxyWS>
  <UrlProxyWSBackup>https://local.vocalcom.com/ProxyHermesWS</UrlProxyWSBackup>
  <UrlProxyJS>https://local.vocalcom.com/ProxyHermesJS</UrlProxyJS>
  <UrlProxyJSBackup>https://local.vocalcom.com/ProxyHermesJS</UrlProxyJSBackup>
  <UrlReadInfosWebService>http://10.0.2.61/hermes360/Supervision/web_service/ReadInfos.asmx</UrlReadInfosWebService>
  <UrlGetConfigWebService>http://10.0.2.61/hermes360/admin/web_service/getconfig.asmx</UrlGetConfigWebService>
  <ModelAN>false</ModelAN>
  <HermesVersion>5</HermesVersion>
  <BandeauVersion>1.0.7</BandeauVersion>
</Proxy>
```

- **CustomerID:** the value should **always be "-1"** for Hermes v.5.
- **JSScriptURL:** corresponds to the DynamicsAPI script URL. There can be multiple JS script files URL, separated by commas. It allows to either implement the UC-CORE API (DynamicsApi.js) or a custom file.
- For **Hermes360:**

Format:

https://@DNS@/HUCC/ProxyHermesConfig,ConfigurationCode,CustomerID,https://@DNS@/HUCC/ProxyHermesCRMPlugins/MsDynamics/DynamicsApi.js

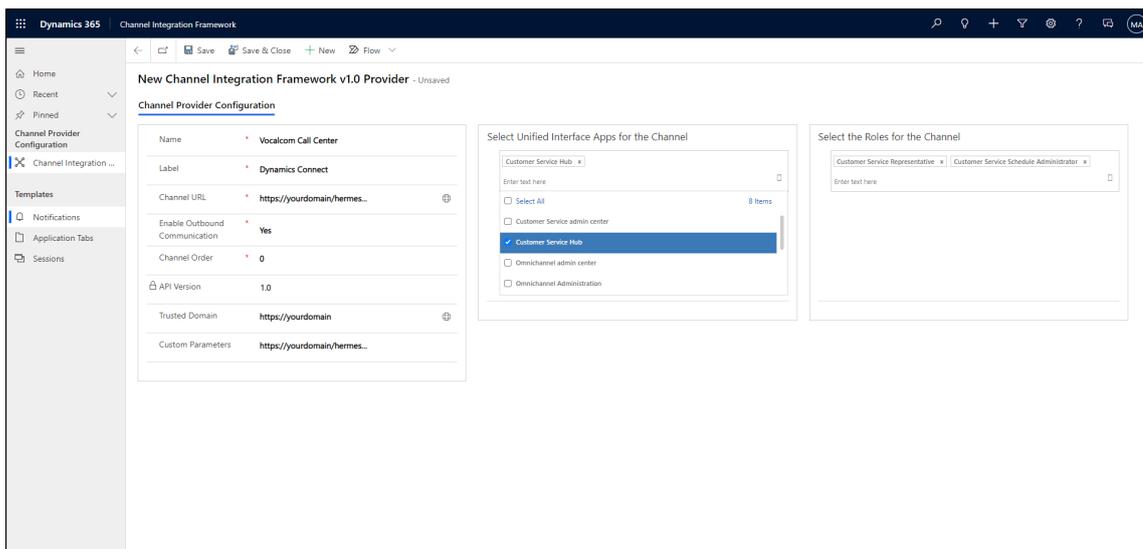
Where:

- **@DNS@** corresponds to your DNS/IP server hosting the Hermes modules,
- **ConfigurationCode** corresponds to the code of the configuration block, displayed in the “ProxyConfig.xml”,



```
<Proxy code="DemoDynamics">
  <UriProxyWS>https://local.vocalcom.com/ProxyHermesWS</UriProxyWS>
  <UriProxyWSBackup>https://local.vocalcom.com/ProxyHermesWS</UriProxyWSBackup>
  <UriProxyJS>https://local.vocalcom.com/ProxyHermesJS</UriProxyJS>
  <UriProxyJSBackup>https://local.vocalcom.com/ProxyHermesJS</UriProxyJSBackup>
  <UriReadInfosWebService>http://10.0.2.61/hermes360/Supervision/web_service/ReadInfos.asmx</UriReadInfosWebService>
  <UriGetConfigWebService>http://10.0.2.61/hermes360/admin/web_service/getconfig.asmx</UriGetConfigWebService>
  <ModeLAN>false</ModeLAN>
  <HermesVersion>5</HermesVersion>
  <BandeauVersion>1.0.7</BandeauVersion>
</Proxy>
```

- **CustomerID** corresponds to the site ID. In this example: 5.
 - **DynamicsApi.js**: corresponds to the custom JS script file. There can be multiple JS script files URL, separated by commas. It allows to either implement the UC-CORE API (DynamicsApi.js) or a custom file.
4. In the **Select Unified Interface Apps for the Channel** frame, select the applications where the CTI toolbar should be visible.
 5. In the **Select the Roles for the Channel** frame, select the roles for which the CTI toolbar should be accessible.



6. Click on the **Save & Close** button.

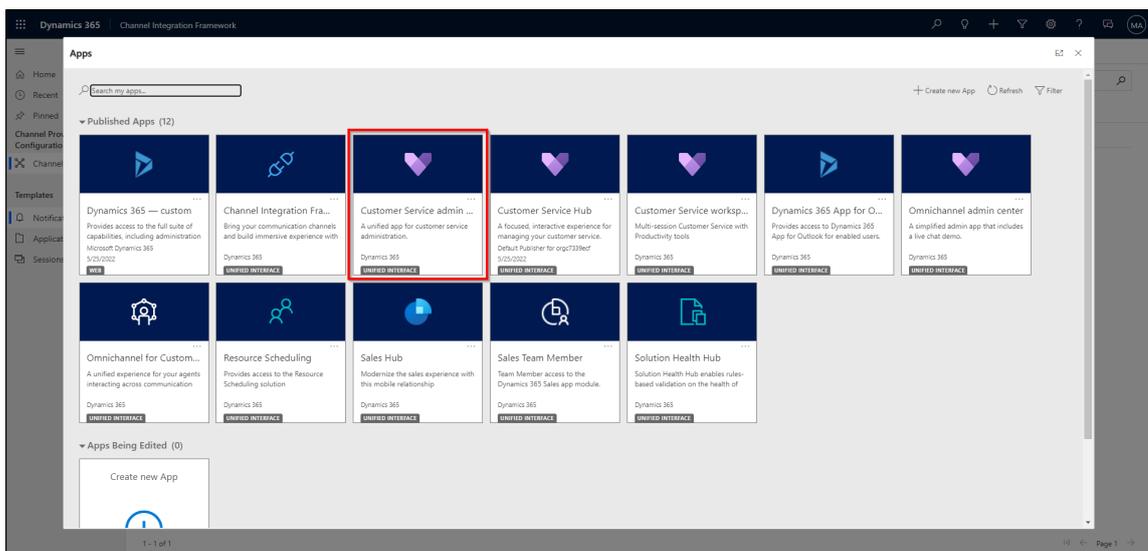
You have created and configured a call center.

4 - Configure a MS Dynamics 365 user

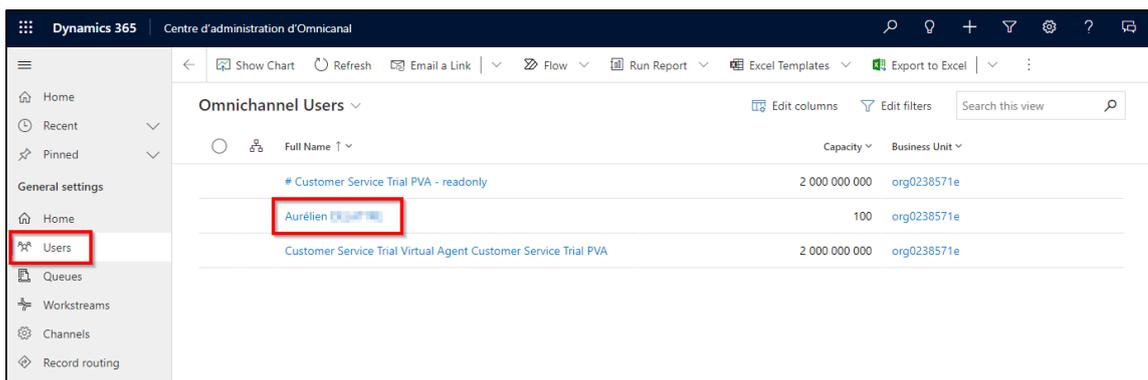
Configuring a MS Dynamics 365 user means filling the custom fields related to users that have been imported. Once filled, these fields will allow the mapping between the MS Dynamics 365 user and the Hermes agent.

To configure a MS Dynamics 365 user:

1. Access the **Customer Service administration** application.



2. Click **Users** and on the name of the user that needs access to the toolbar.



3. Fill the custom fields with the information that have been configured in Hermes, for the associated agent:

- **Username:** corresponds to the agent login,
- **Password:** corresponds to the agent's password (see "[Retrieve agent passwords in Hermes](#)" on the next page),
- **Station:** corresponds to the station assigned to the agent, and will be pre-filled in the CTI log-in screen,
- **Created agent:** enter 1 to allow the user to access the CTI toolbar.

The screenshot shows the user profile for Aurélien. The 'HUUC' section is highlighted with a red box, containing the following fields:

HUUC	
Username	1009
Password	sdqw
Station	9 991
Created agent	1



Tip

If you use the SSO feature, only the **Created agent** field is mandatory, and must be filled with "1".

4. Click the **Save & close** button.
5. Repeat this procedure for every user.

You have configured a MS Dynamics 365 user.

Retrieve agent passwords in Hermes



Note

You need server administrator access to retrieve agent passwords.

You can retrieve the encrypted passwords of all the agents of a site by calling a web service.

To retrieve agent passwords:

1. From the server where HUCC is installed, access https://{yourdomain}/{hermes_admin_path}/Web_service/getconfig.aspx in a browser.

For example:

https://mycompany.net/hermes360/Admin/Web_service/getconfig.aspx

2. Click **ListAgent**.

The **ListAgent** opens.

ReadTools

Click [here](#) for a complete list of operations.

ListAgent

Test

To test the operation using the HTTP POST protocol, click the 'Invoke' button.

Parameter	Value
customerid:	<input type="text"/>

SOAP 1.1

The following is a sample SOAP 1.1 request and response. The placeholders shown need to be replaced with actual values.

```
POST /hermes360/admin/Web_service/getconfig.aspx HTTP/1.1
Host: mycompany.net
Content-Type: text/xml; charset=utf-8
Content-Length: length
SOAPAction: "http://vocalcom.com/ToolsAdmin/ListAgent"

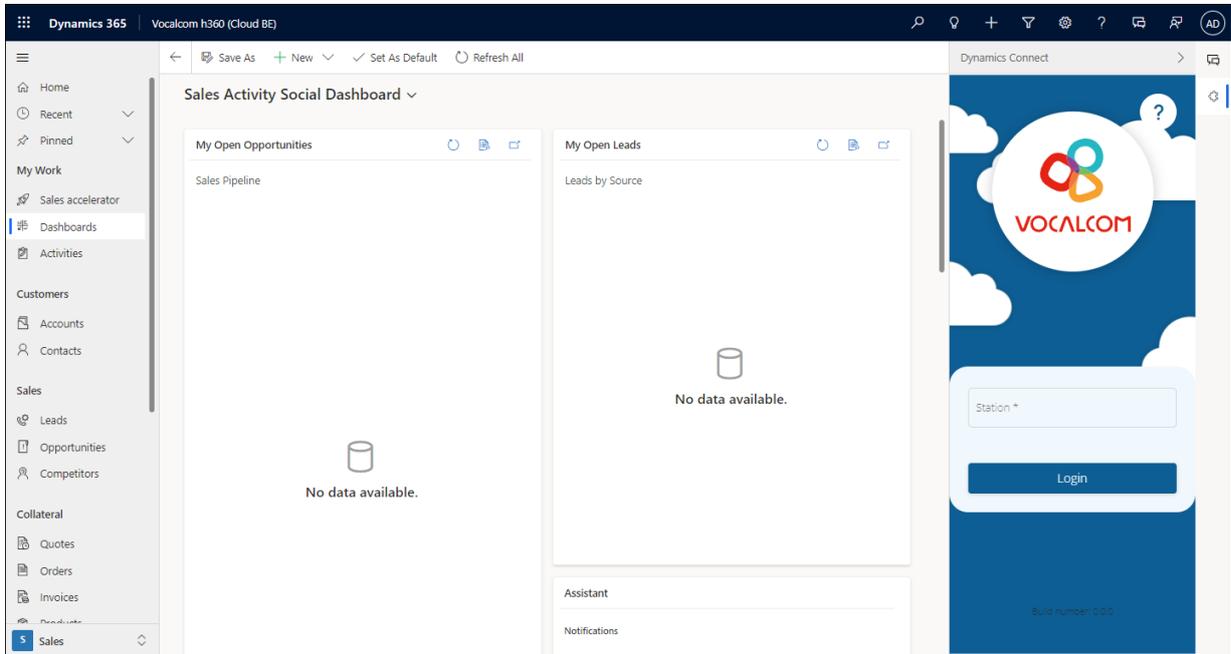
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <ListAgent xmlns="http://vocalcom.com/ToolsAdmin/">
      <customerid>string</customerid>
    </ListAgent>
  </soap:Body>
</soap:Envelope>
```

3. Enter the site ID, in the **customerId** field.
4. Click **Invoke**.

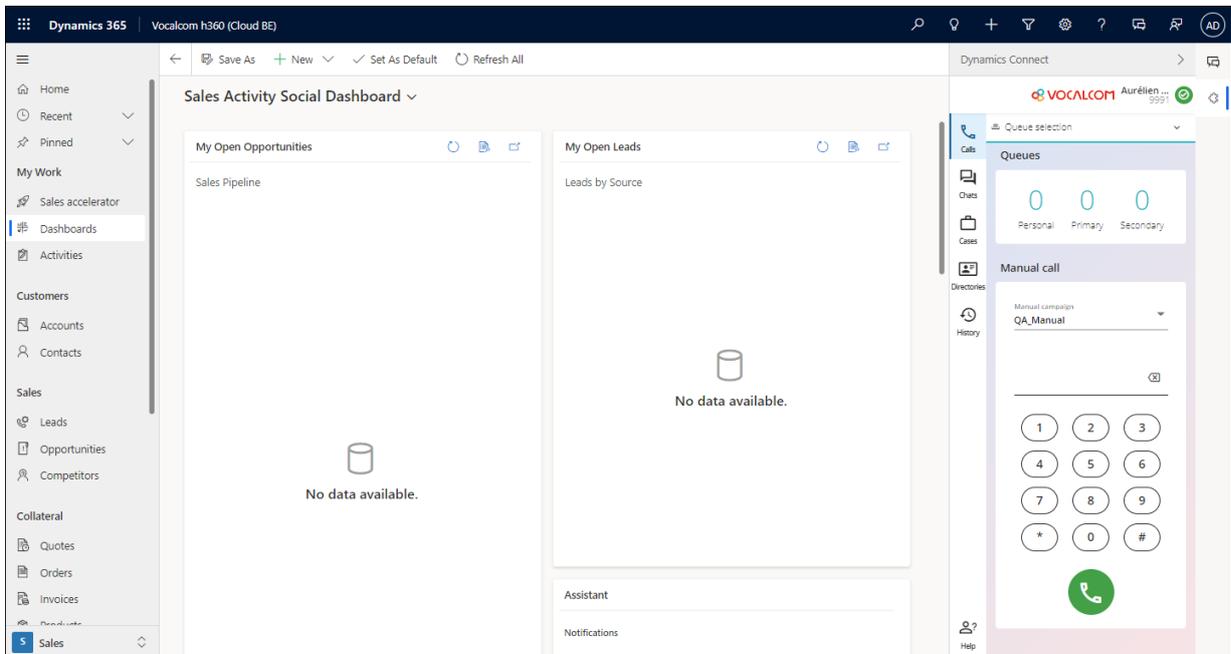
All the site agents are displayed. You can find their respective password in the **Password** tag.

Result

After following the steps described above, the user can now see and use the CTI toolbar.



They have to enter their station number, and click **Login**, to access the toolbar features.



 Note

In the case of self-signed certificates, you may find that the CTI toolbar is not displayed. It is then necessary to access the following link and authorize its access:

https://myserverdomain/hermes_net_v5/UniversalConnector/ProxyHermesJS/loader/dynamics/dynamics.html

Then, it is necessary to reload the Dynamics 365 organization page: the CTI toolbar is now available.