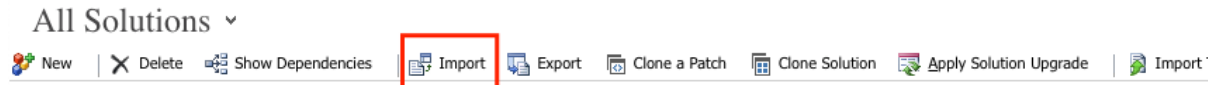




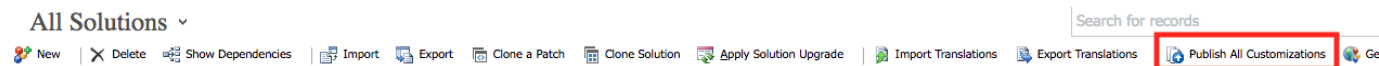
MS Dynamics VCC Integration Setup Document

Managed Package Import

1. Login to MS Dynamics with “Admin” privilege.
2. Navigate to Settings > Solutions
3. Click on “Import” button

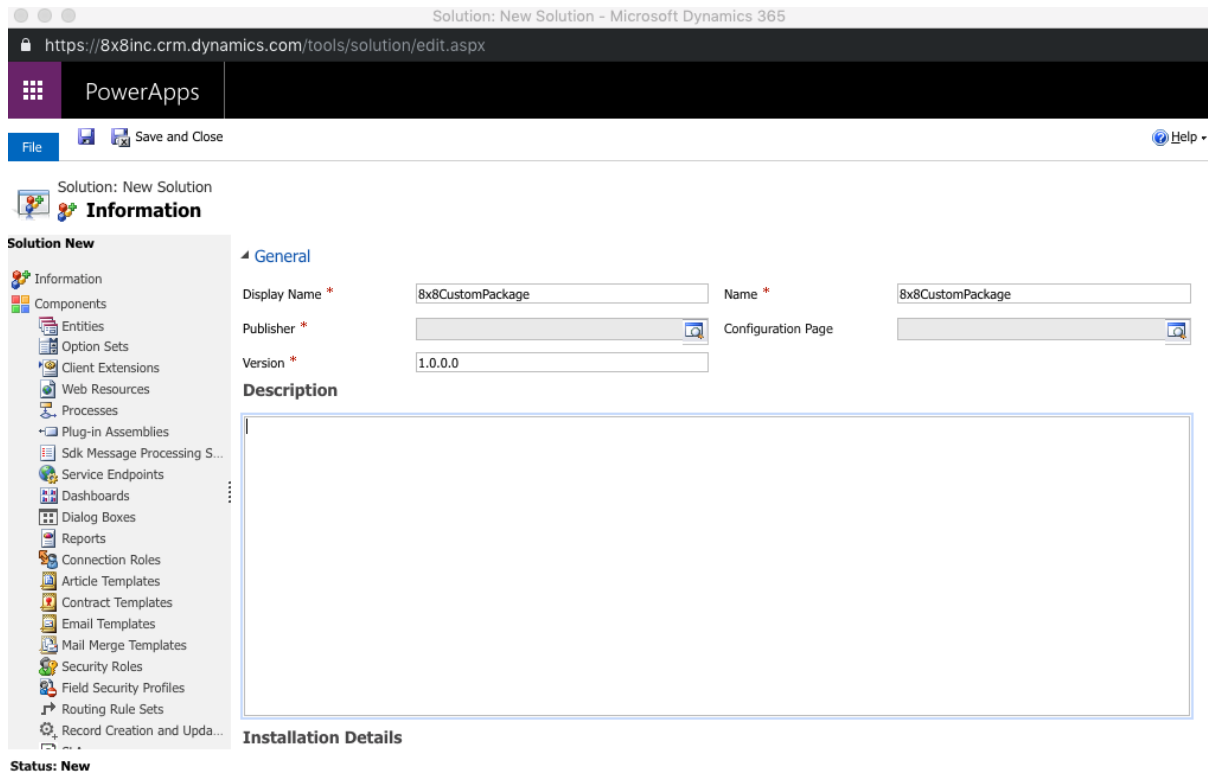


4. In the new window, choose the _8x8Integration_0_2_0_0_managed.zip file (This file is the managed package and will be sent separately)
5. Click on Next button and then Import
6. Once Import is completed, please click the button “Publish All Customizations”

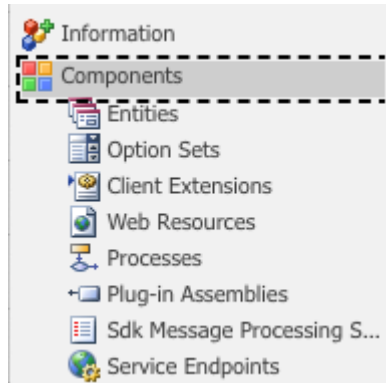


Creating Custom Solution

1. By default, the package will point to one of the VCC clusters, which needs to be customized.
2. Navigate to Settings > Solutions
3. Click on “New” Button
4. Set Display Name as 8x8CustomPackage
5. Set Version as 1.0.0.0



6. Click on “Components”

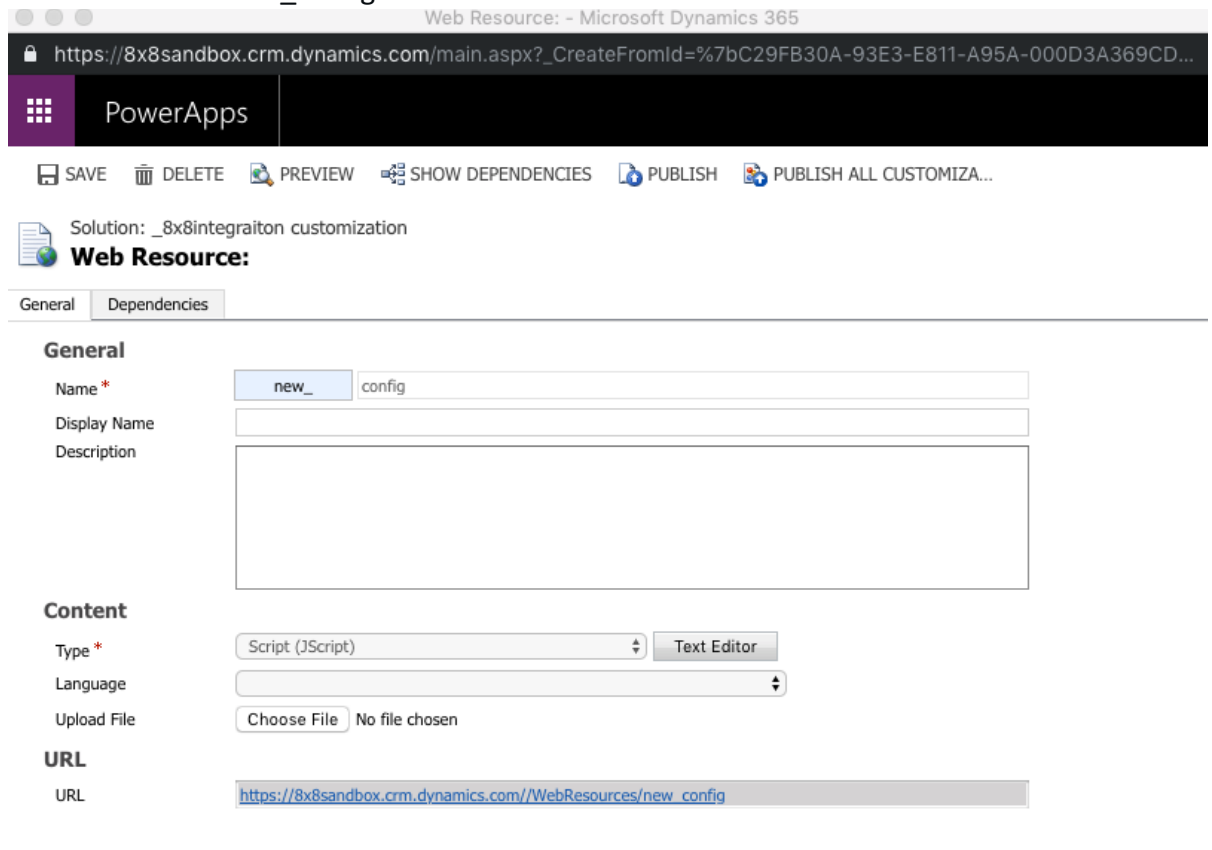


7. Then click on “Add Existing”

8. Select “Web Resource”

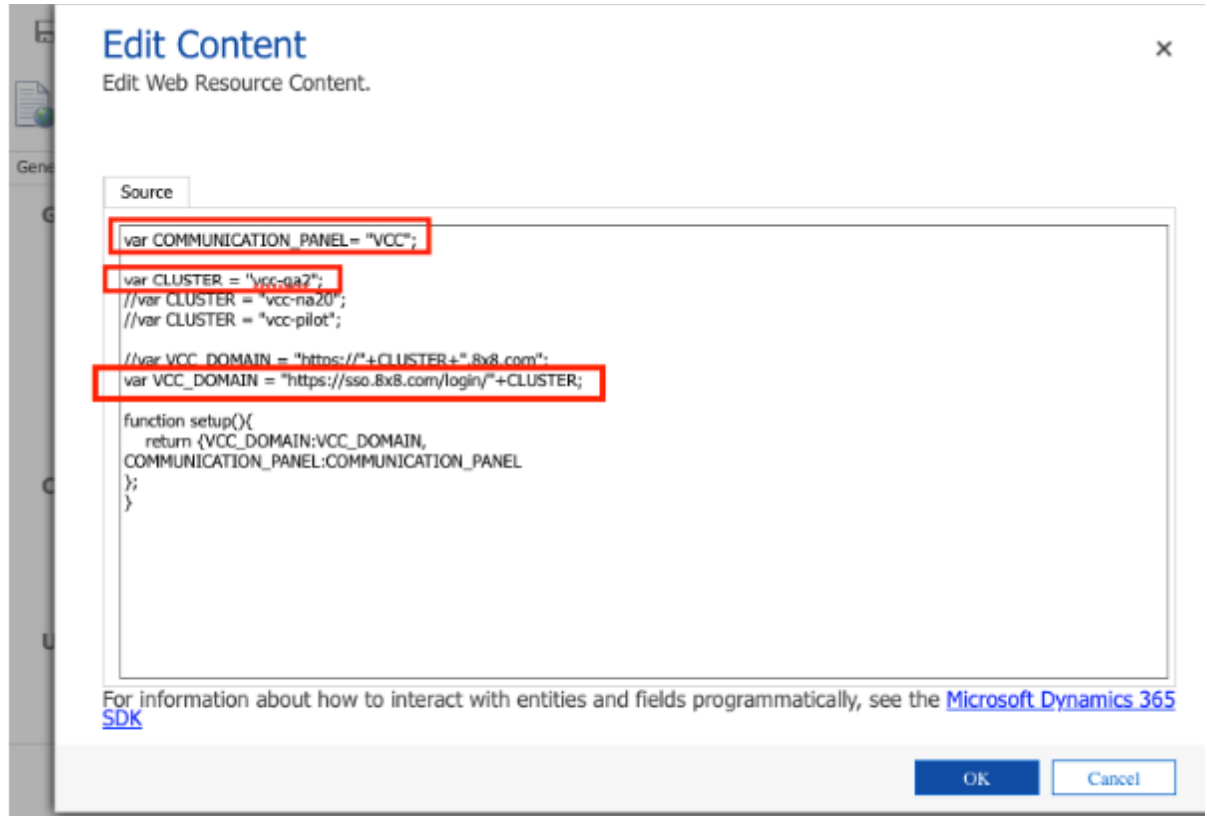
9. Select “new_config” and click OK

10. Double-click on “new_config”. You will see the window like below:



11. Click on Text Editor button

12. You will see the below window



13. Make sure the value in the first line is VCC
14. Change the second line to your corresponding VCC cluster
15. Make sure the VCC_DOMAIN with the url having sso.8x8.com is uncommented.
16. Click OK
17. Click Save
18. Click Publish All Customizations
19. Now Refresh the page and you will see the 8x8 icon MS Dynamics. Double-clicking on the icon will open VCC AGUI

Click-to-Dial Setup

1. Login to MS Dynamics
2. Navigate to Settings > Customizations > Customize the system
3. In the newly opened window, click on Components > Entities > Contact > Forms > Contact. Here we have chosen contact entity. For other entities such as Account,

Lead, Opportunity - select accordingly.

Solution: Default Solution - Microsoft Dynamics 365

https://8x8sandbox.crm.dynamics.com/tools/solution/edit.aspx?id=%7bfd140aaf-4df4-11dd-bd17-0019b9312238%7d#

PowerApps

File Publish All Customizations Help

Contact

Forms

Solution Default Solution

- Connection
- Connection Role
- Contact
 - Forms**
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationships
 - Messages
 - Business Rules
 - Hierarchy Settings
 - Dashboards
- Contact Price List
- Contract
- Contract Line
- Contract Template
- Currency
- Customer Asset
- Customer Relationship
- Data Map

System Forms **Active Forms** ▾

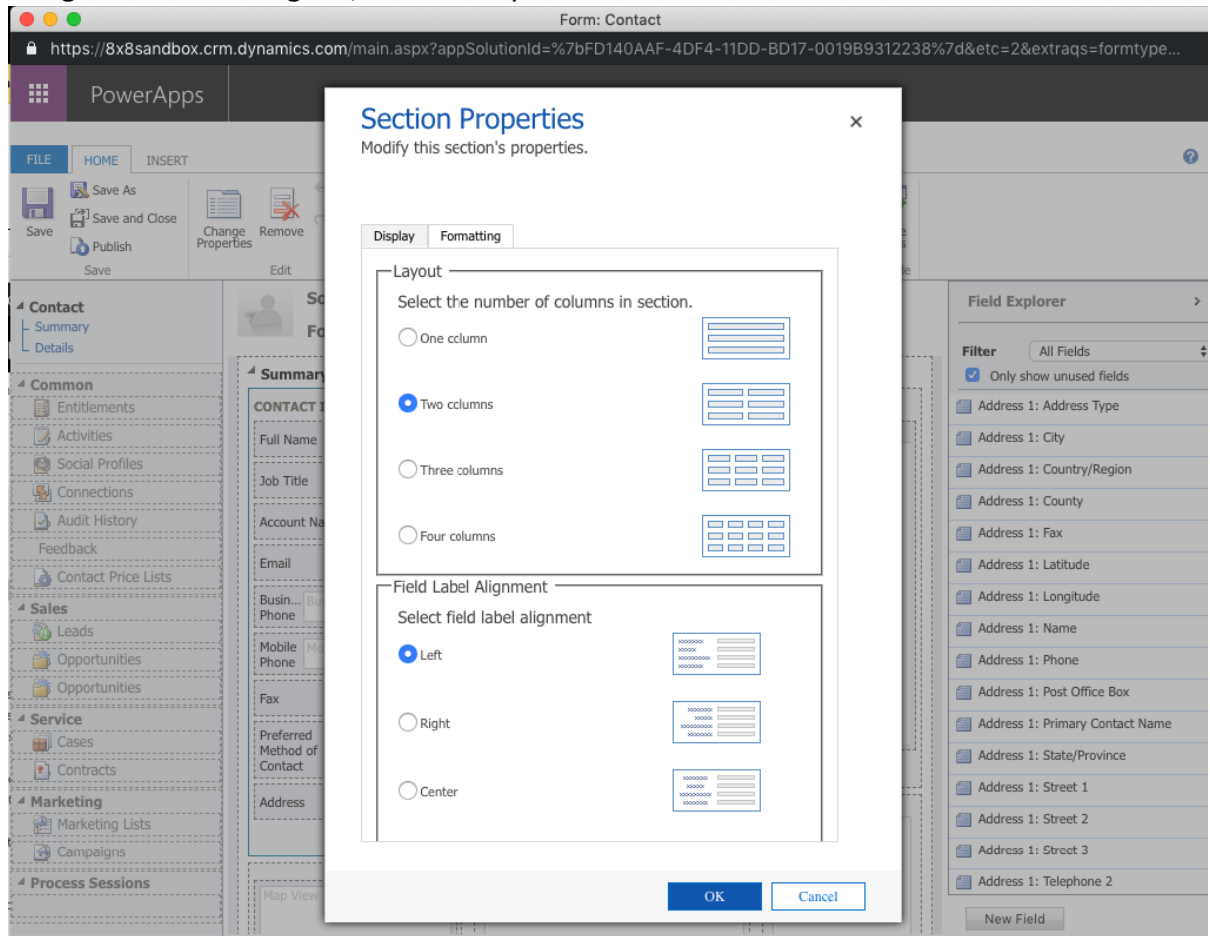
New ▾ Delete Enable Security Roles Form Order ▾ Activate Deactivate More Actions ▾

Name	Form State	Form Type ↑	State	Customizable	Version	⌵ ↻
Contact Card form	Active	Card	Managed	True	8.0.0.0	Default
Contact - Mobile	Active	Main	Managed	True	6.1.0.0	This form is not available on mobile devices.
AI for Sales	Active	Main	Managed	True	1.0	Update
Contact for Interactive experie...	Active	Main	Managed	True	8.0.0.0	Default
Contact	Active	Main	Managed	True	5.0.0.0	Update
Contact Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Default
App for Outlook Contact Card	Active	Quick View F...	Managed	True	1.0	

1 - 14 of 14 (0 selected)

Status: Existing

4. In the newly opened window, double click on CONTACT INFORMATION pane. Navigate to Formatting tab, then set Layout as “Two Columns”



5. Double click on all the fields except phone fields, navigate to Formatting tab and select “Two columns”.
6. Go to Insert tab at the top of the page, and select Web Resource.
7. Select Web Resource as “new_clicktodialform”, and label as per the mapping given in the bottom of this document. For example, if we are setting up click to dial for

Contact entity's Business Phone field, then the Label should be "telephone1"

Web Resource Properties

? X

Modify this Web resource's properties.

General Formatting Dependencies

Web resource

Web resource *

Field Name and Properties

Name * WebResource_telephone1

Label * telephone1

Display label on the Form

Visibility

Visible by default

Enable for mobile

Web Resource Properties

Custom Parameter(data)

Restrict cross-frame scripting, where supported.

Pass record object-type code and unique identifier as parameters.

OK Cancel

8. Navigate to Formatting tab. Select Layout as One column. Enter Number of Rows as 1. Make sure Display Border checkbox is unchecked.
9. Click OK

10. The final CONTACT INFORMATION tab should look like below:



CONTACT INFORMATION		
Full Name	Full Name	
Job Title	Job Title	
Account Name	Company Name	
Email	Email	
Business Phone	Business Phone	new_clicktodialform
Mobile Phone	Mobile Phone	new_clicktodialform
Fax	Fax	
Preferred Method of Contact	Preferred Method of Contact	
Address	Address 1	

11. Click on Home Tab and click Save

12. Click Publish

13. If you go to the contact page, you should see the click-to-dial icon as below:

The screenshot shows a contact page header with a 'CONTACT' dropdown menu and a profile icon. Below the header, the contact name 'Test Contact' is displayed. A 'Summary' tab is selected. The main content area is titled 'CONTACT INFORMATION' and contains the following fields:

CONTACT INFORMATION	
Full Name *	Test Contact
Job Title	-----
Account Name	-----
Email	-----
Business Phone	2017060290 
Mobile Phone	2017060290 
Fax	-----
Preferred Method of Contact	Any
Address	-----

14. Repeat the steps 3 to 12, until all the desired click to dial fields are setup completely.

Label Mapping for Click-to-Dial

Entity	Entity Field	Click to Dial Label Name
Contact	Business Phone	telephone1
Contact	Mobile Phone	mobilephone
Account	Phone	telephone1
Lead	Business Phone	telephone1
Lead	Mobile Phone	mobilephone