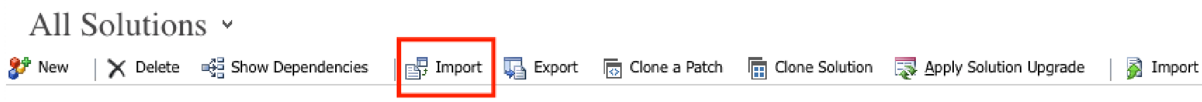
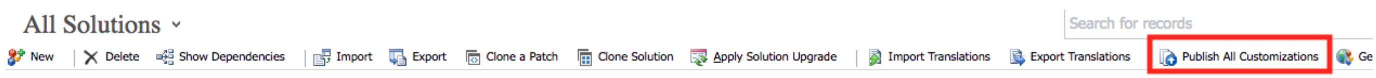
MS Dynamics VCC Integration Setup Document

Managed Package Import

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

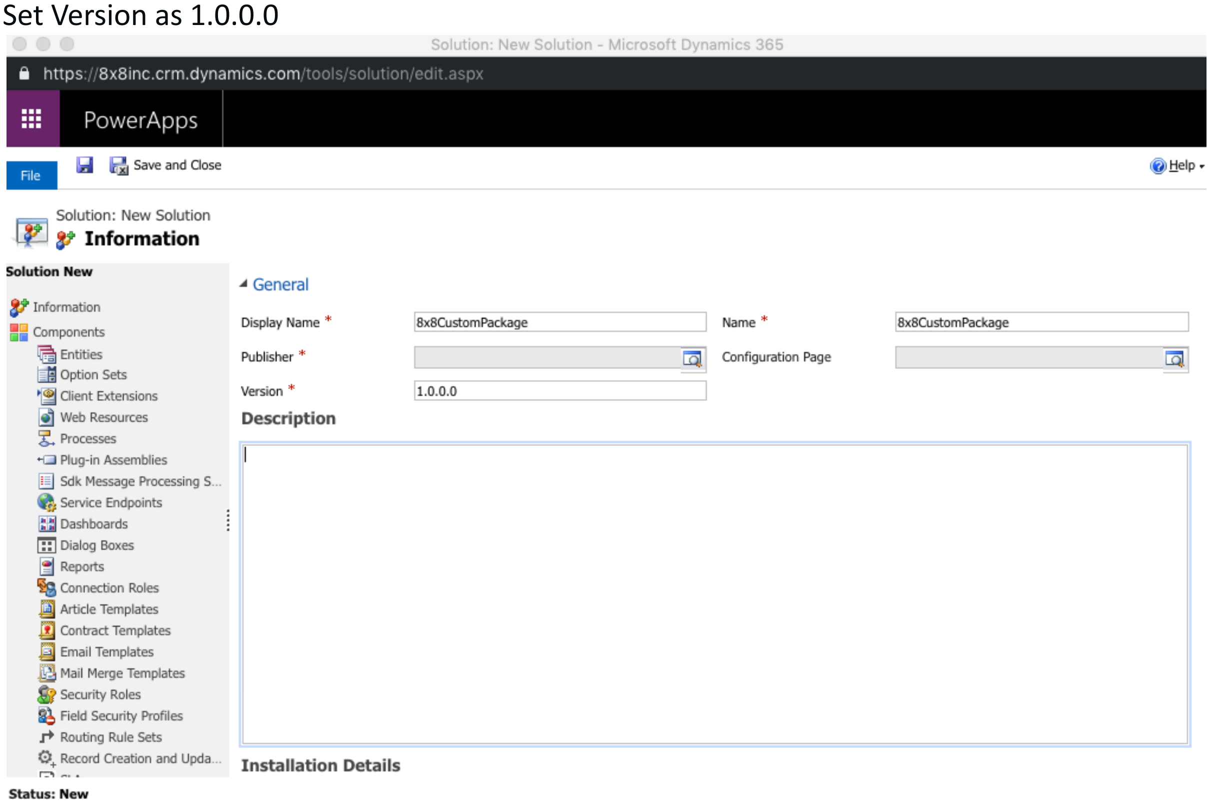


4. In the new window, choose the _8x8Integration_0_2_0_0_managed.zip file (This file is the managed package and will be sent separately)
5. Click on Next button and then Import
6. Once Import is completed, please click the button “Publish All Customizations”

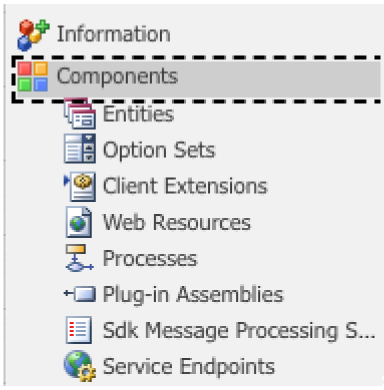


Creating Custom Solution

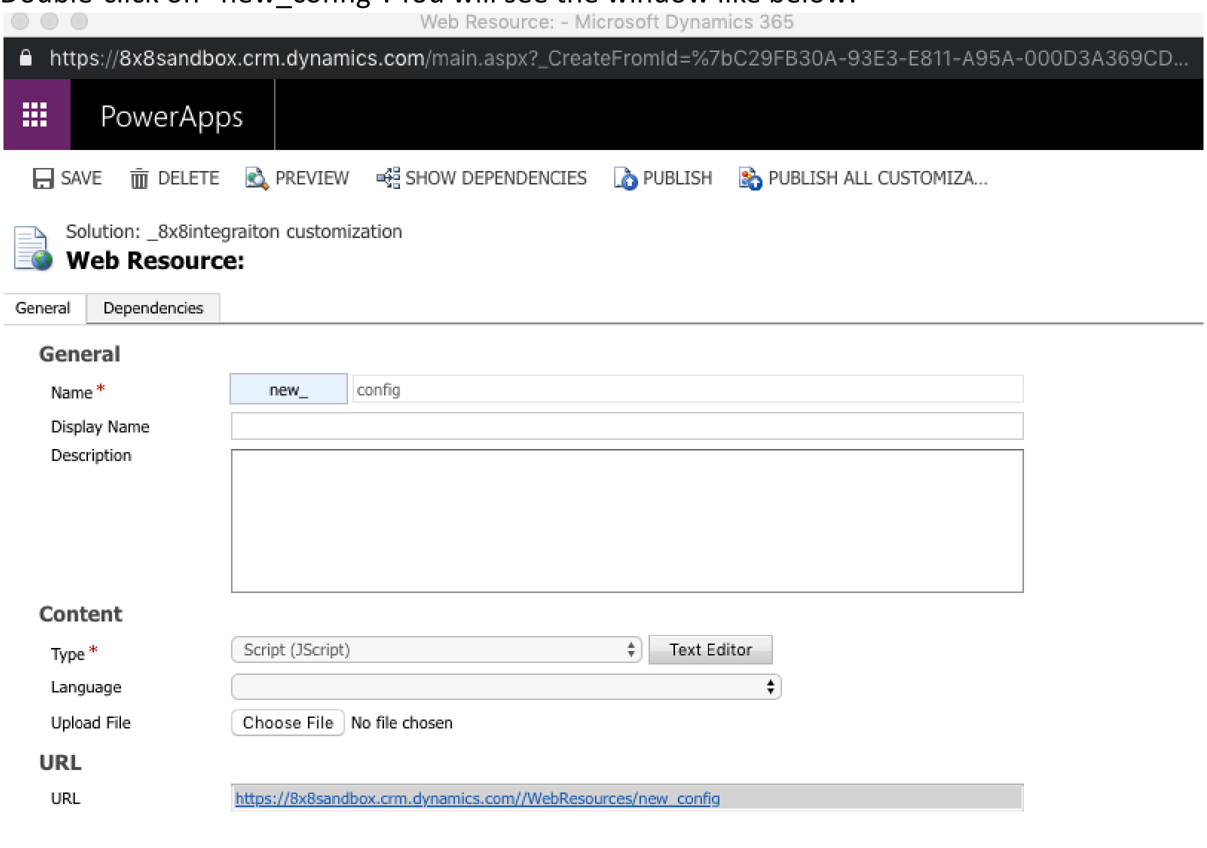
1. By default, the package will point to one of the VCC clusters, which needs to be customized.
2. Navigate to Settings > Solutions
3. Click on “New” Button
4. Set Display Name as 8x8CustomPackage
5. Set Version as 1.0.0.0



6. Click on “Components”

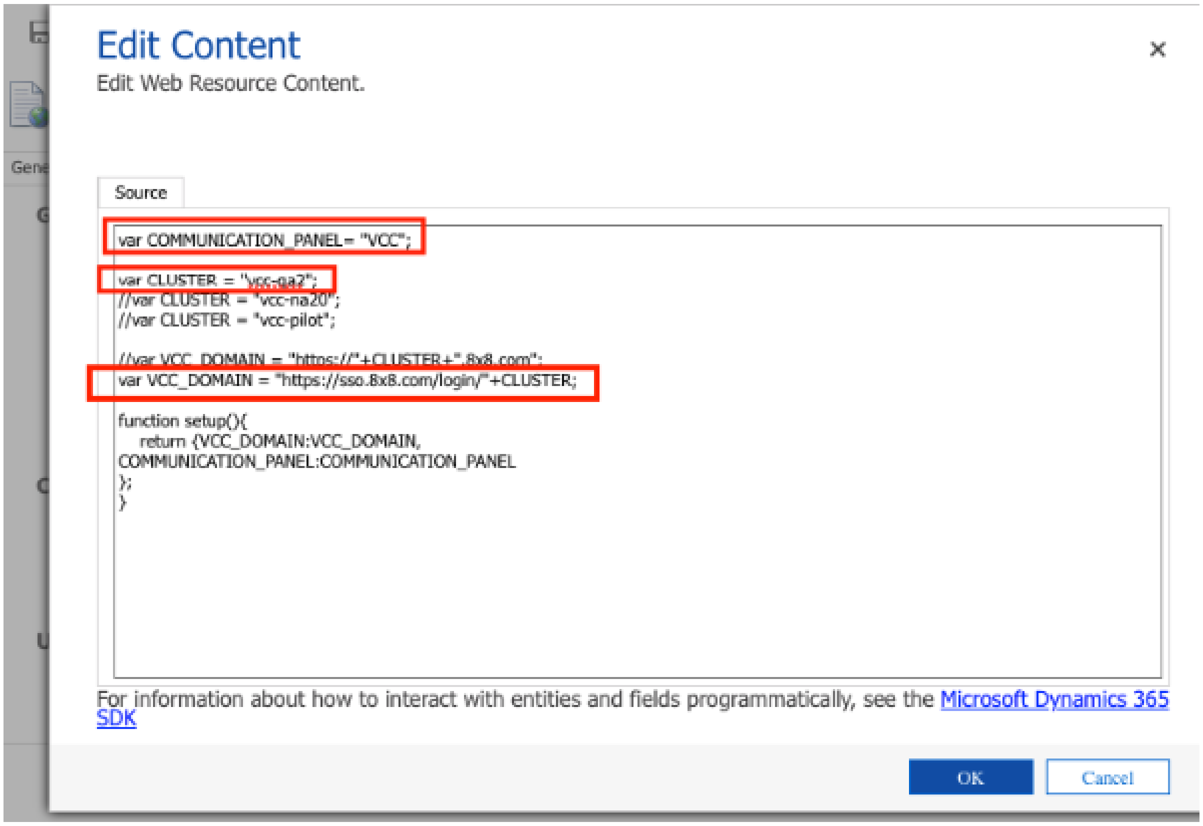


7. Then click on “Add Existing”
8. Select “Web Resource”
9. Select “new_config” and click OK
10. Double-click on “new_config”. You will see the window like below:



11. Click on Text Editor button

12. You will see the below window

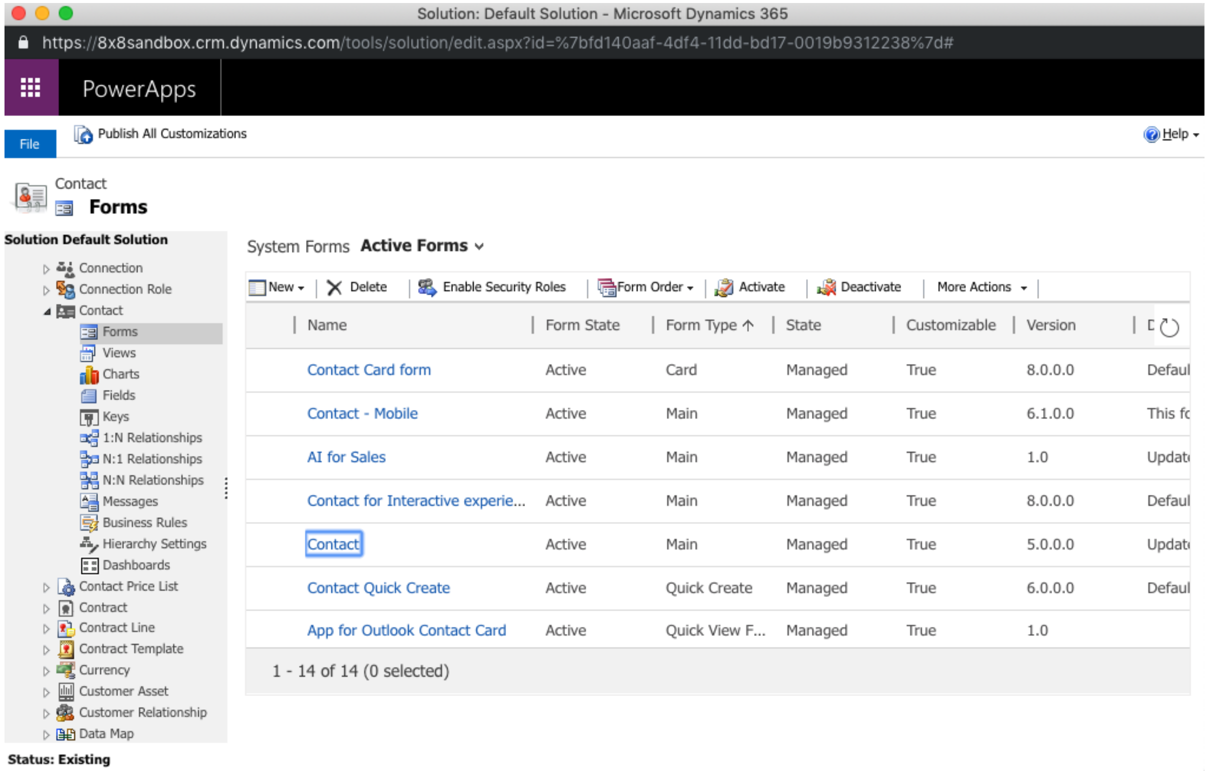


13. Make sure the value in the first line is VCC
14. Change the second line to your corresponding VCC cluster
15. Make sure the VCC_DOMAIN with the url having sso.8x8.com is uncommented.
16. Click OK
17. Click Save
18. Click Publish All Customizations
19. Now Refresh the page and you will see the 8x8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

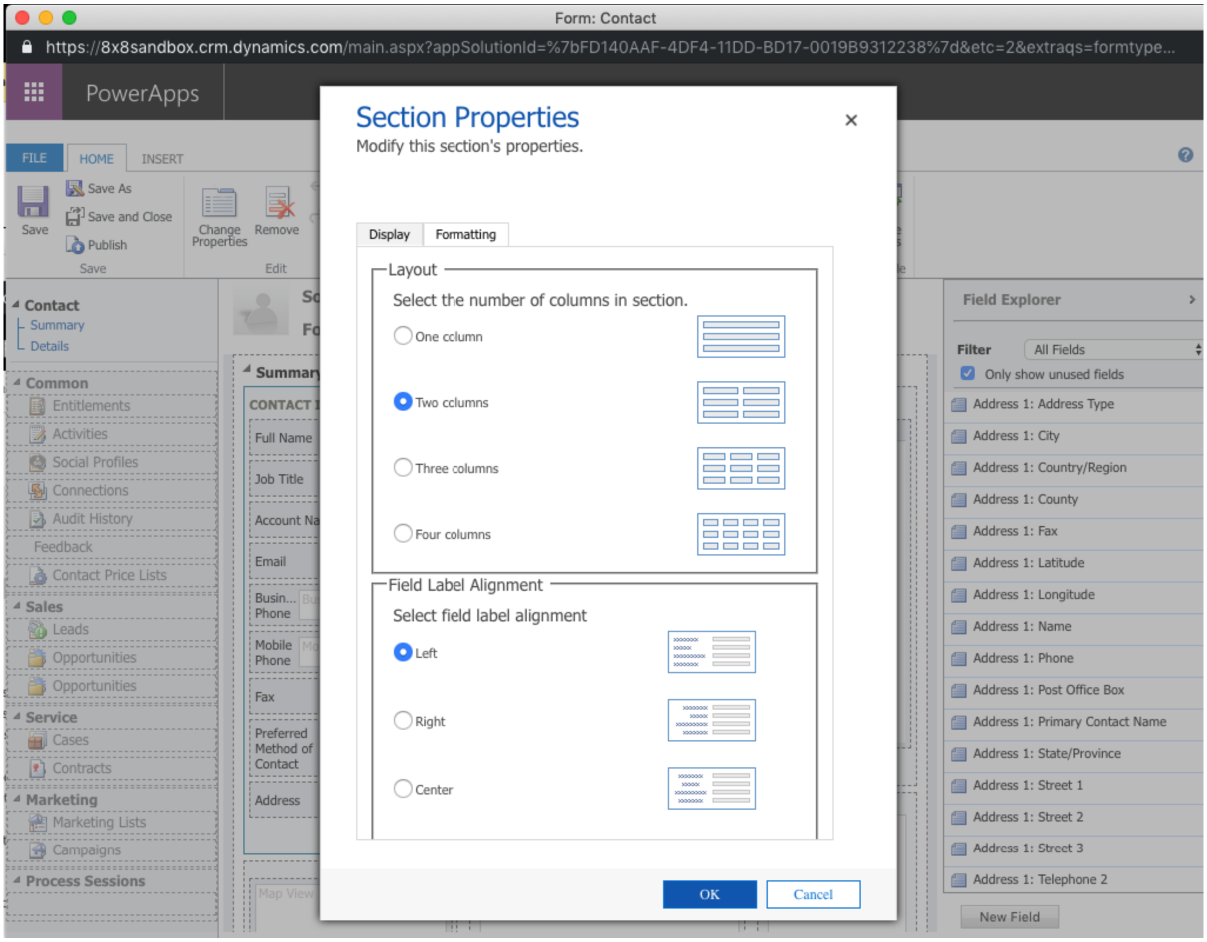
Click-to-Dial Setup

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.

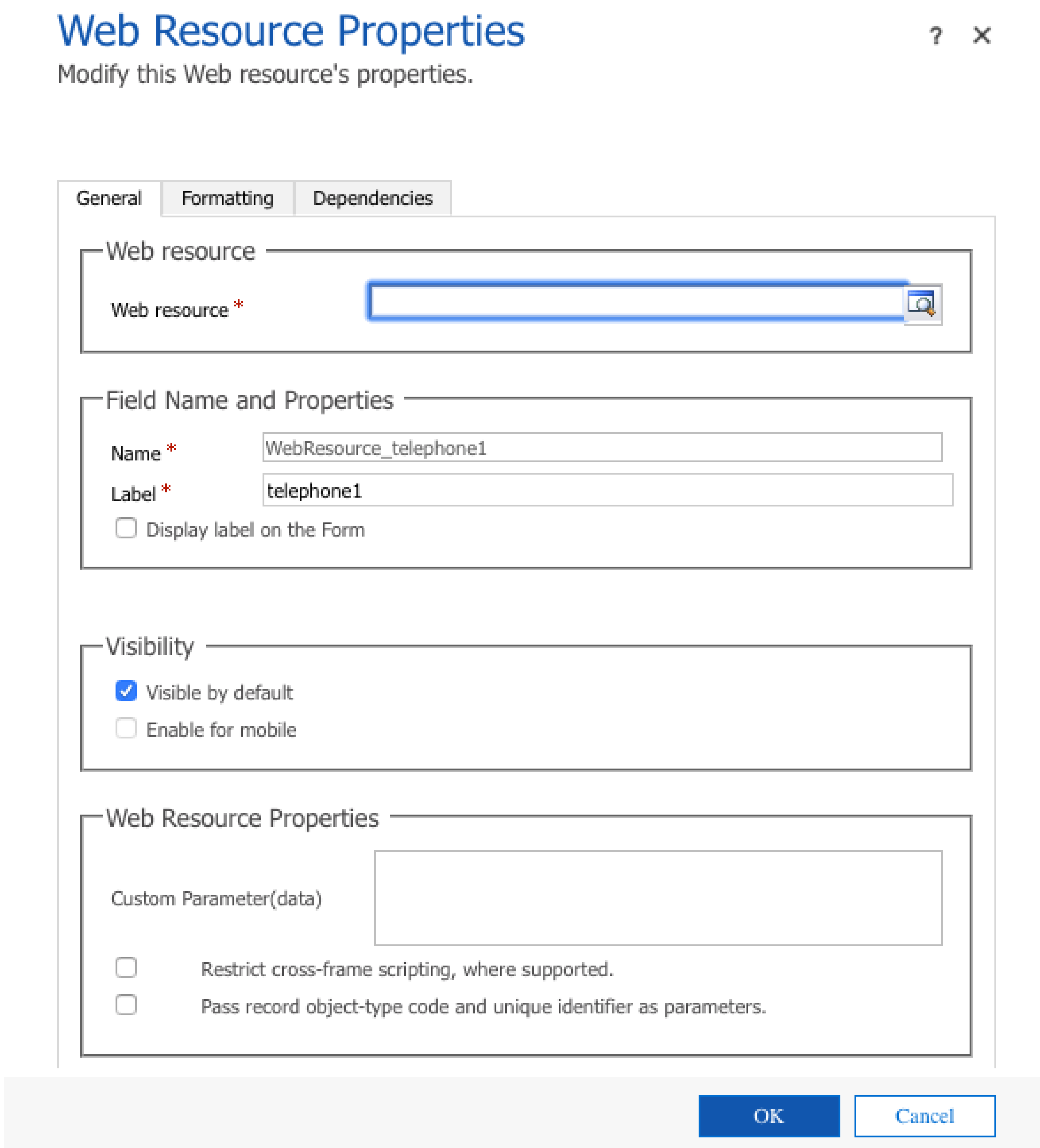


4. In the newly opened window, double click on CONTACT INFORMATION pane. Navigate to Formatting tab, then set Layout as “Two Columns”



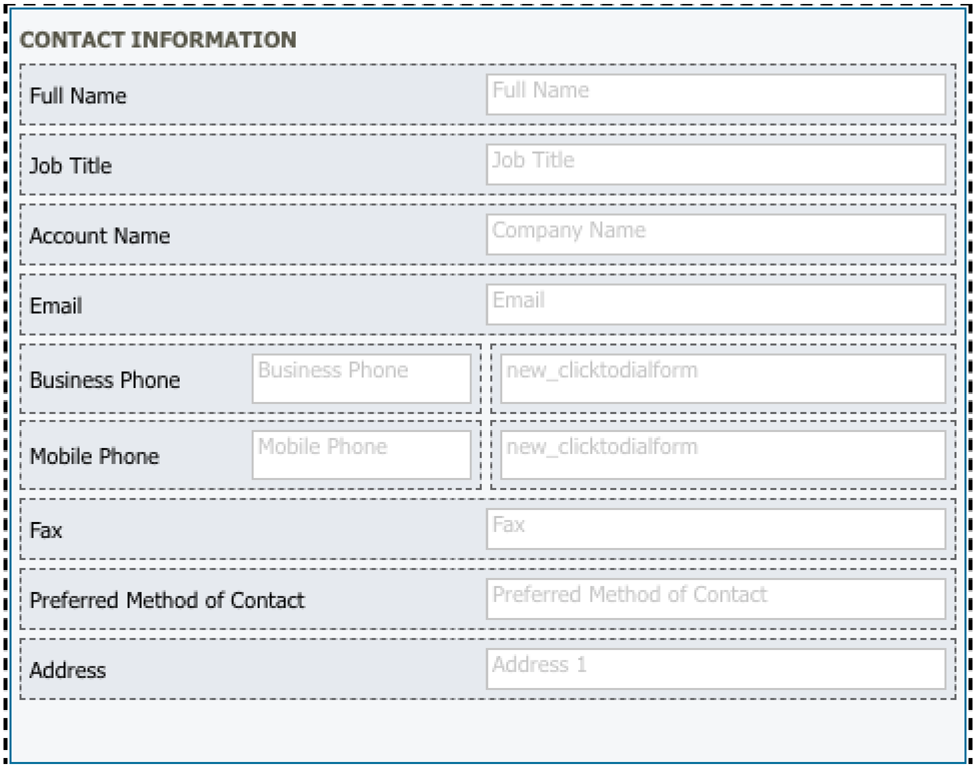
5. Double click on all the fields except phone fields, navigate to Formatting tab and select “Two columns”.
6. Go to Insert tab at the top of the page, and select Web Resource.
7. Select Web Resource as “new_clicktodialform”, and label as per the mapping given in the bottom of this document. For example,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

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



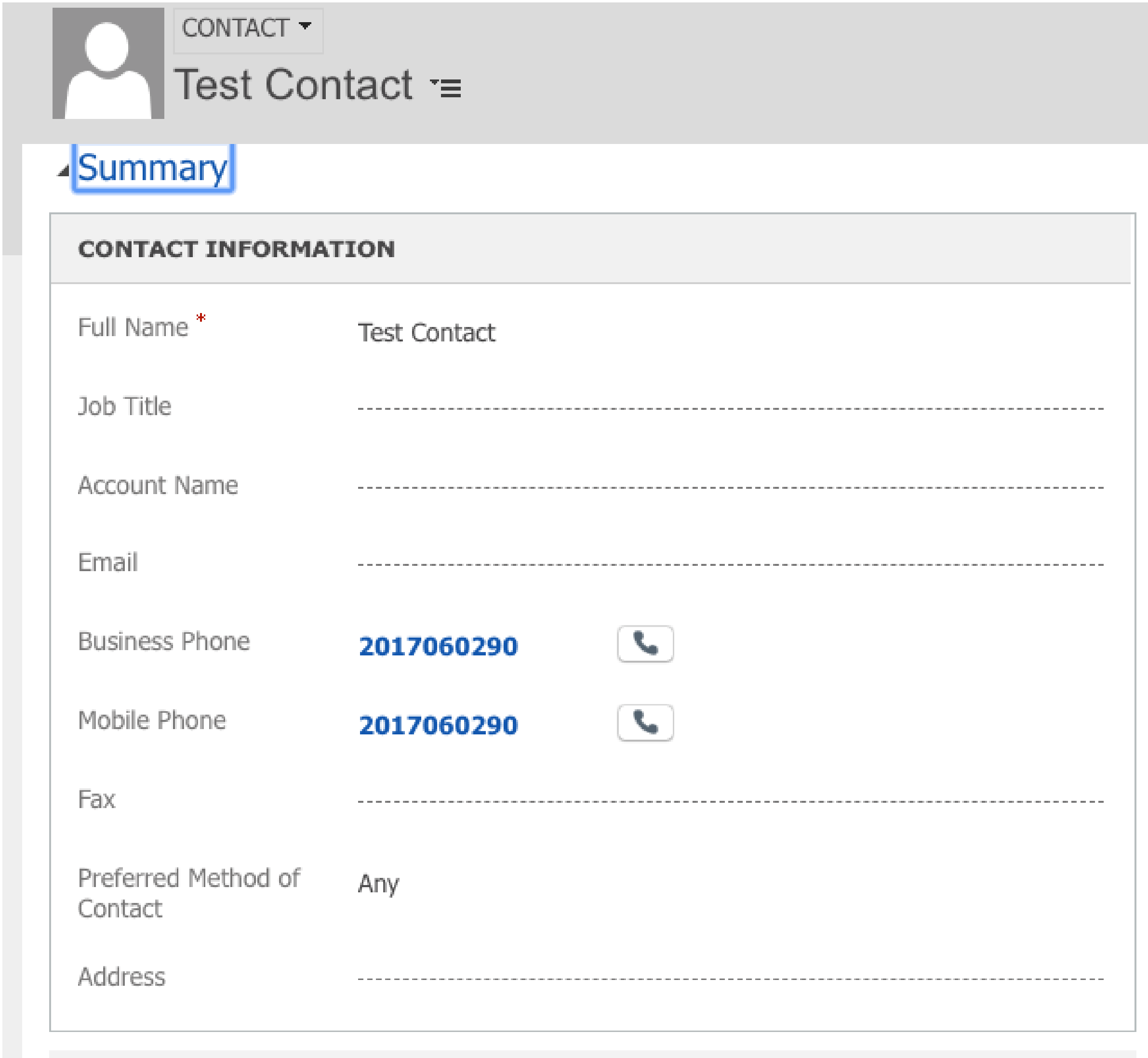
8. Navigate to Formatting tab. Select Layout as One column. Enter Number of Rows as 1. Make sure Display Border checkbox is unchecked.
9. Click OK

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



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:



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