



# RingCentral for Dynamics V2 Admin Guide

RingCentral

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 ...

## No data available.

**S Service**

## IMPORTANT NOTICE

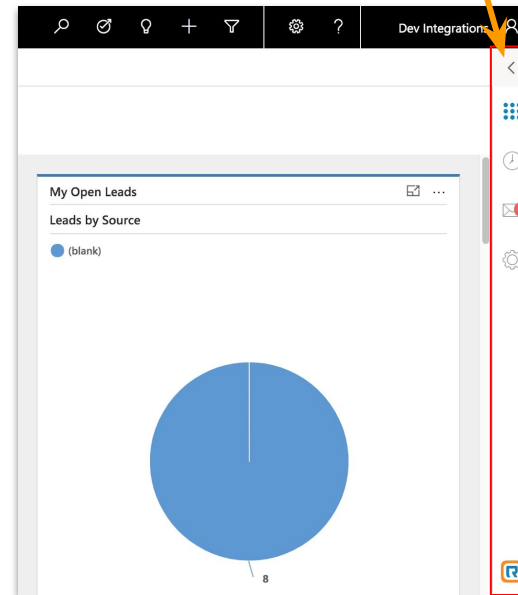
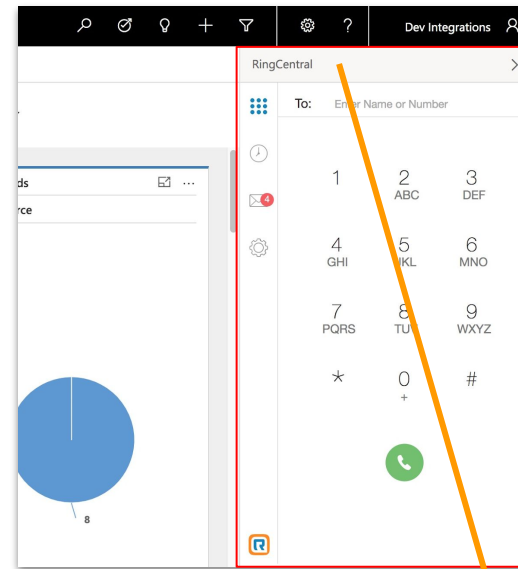
### App Interface

# Impact of CIF update

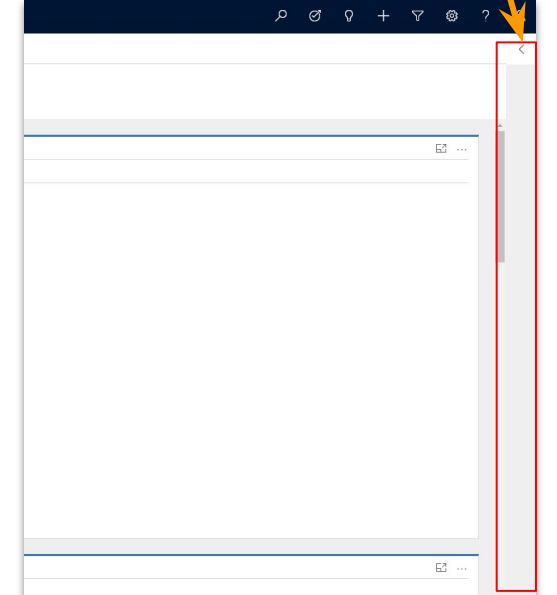
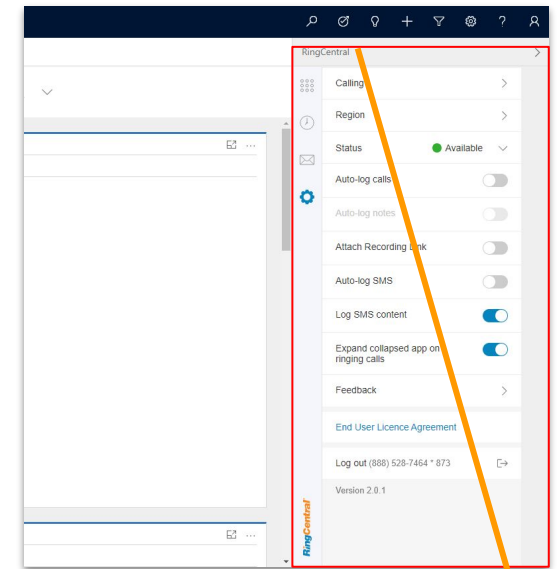
Microsoft recently introduced a native sidebar with latest update to CIF v1.0. With a native sidebar introduced, the RC app will be impacted, including:

- An extra sidebar shows in the app
  - When RC app folded, the native sidebar covers the navigation bar.
- Please click on the arrow on the top to expand the RC application.

RC is communicating with MS on this issue. If any new updates from MS, RC will continually strive to provide the best experience.



Before CIF v1.0 update



After CIF v1.0 update

# System Requirements

## Dynamics 365

- (online) version 9.1 and higher versions

## Browsers

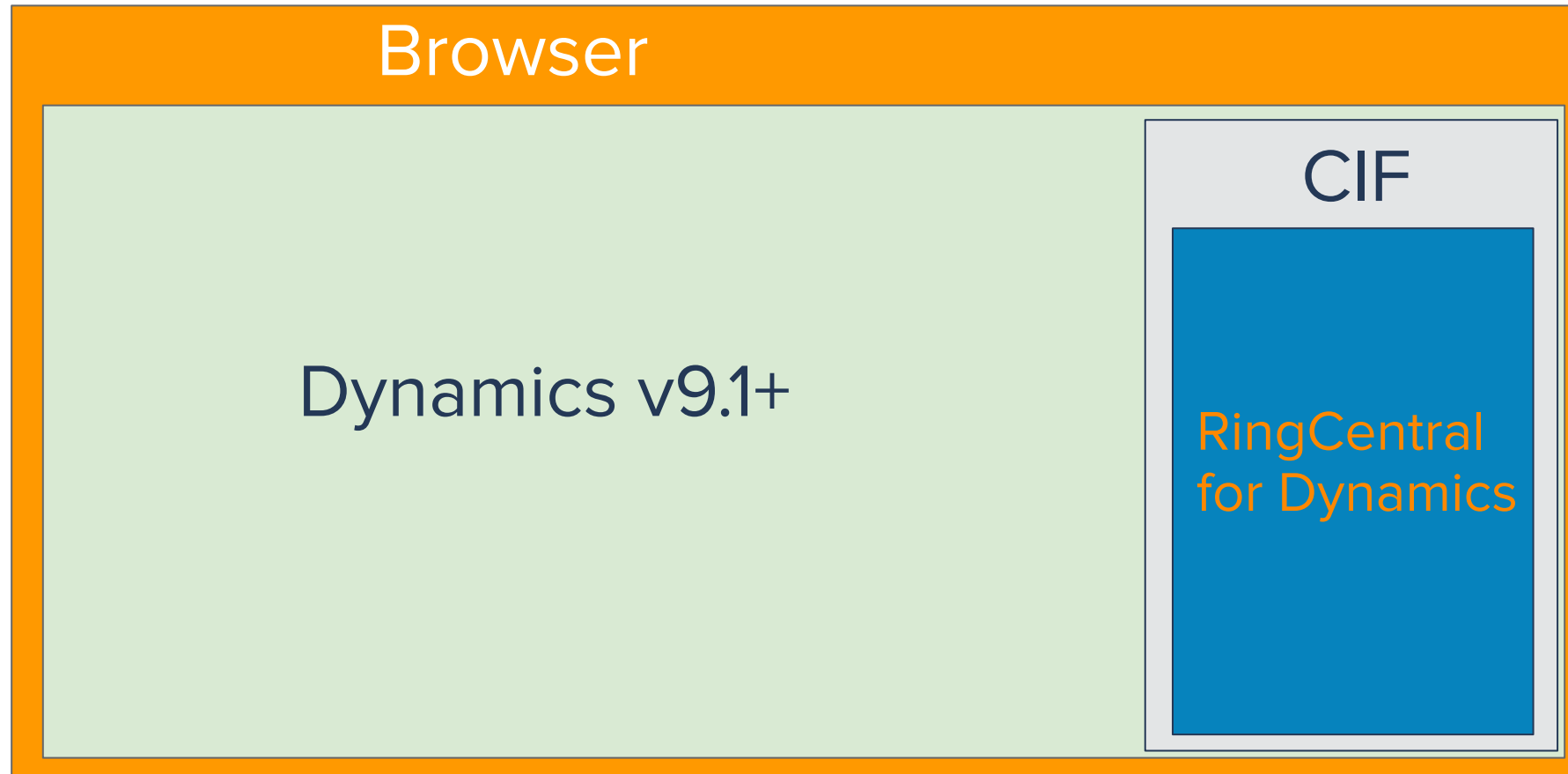
- Google Chrome (Recommended, version 69 or later)
- Microsoft Edge



# CIF - Channel Integration Framework

[More details on CIF](#)

## How RingCentral for Dynamics v2 works

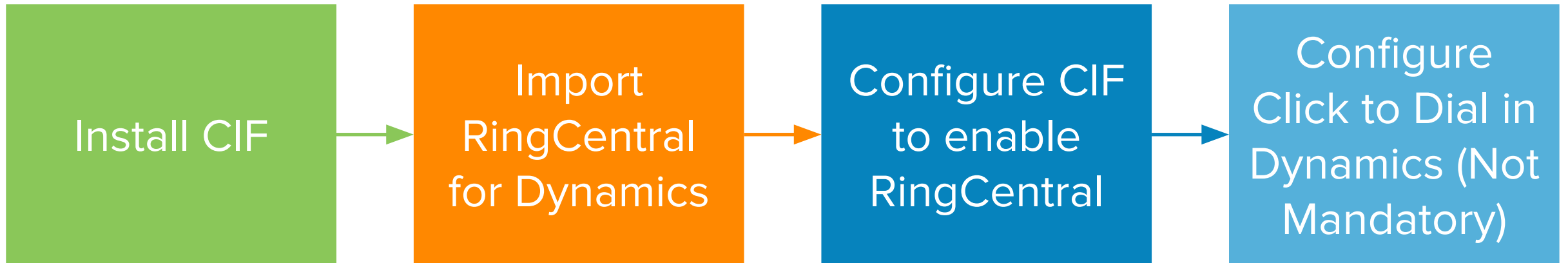


# Installation

- Install from package
  - [Install from new](#)
  - [Update from old version \(v1.x\)](#)
- Install from App store (not applicable in Limited Beta)
- [Uninstall](#)

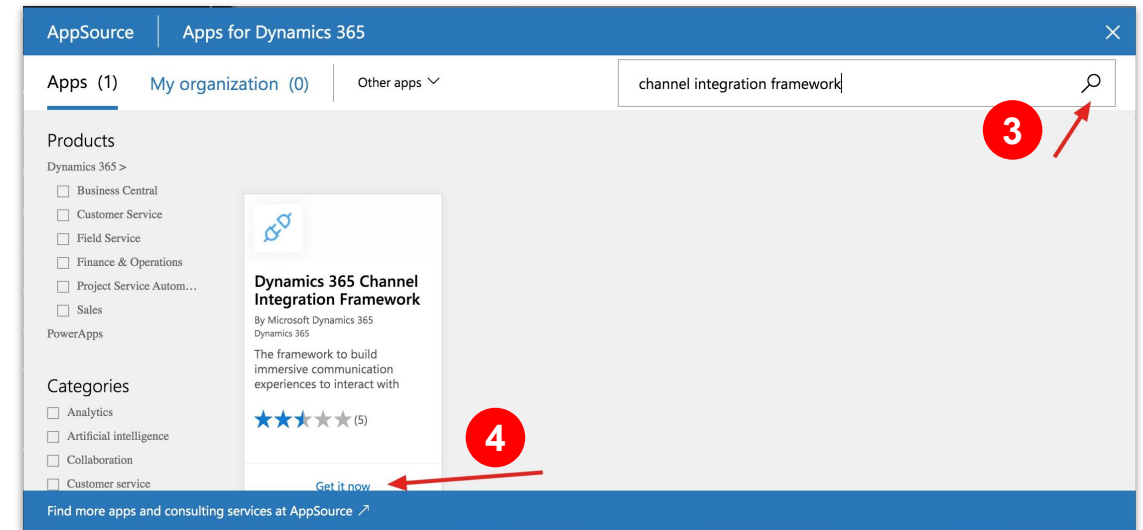
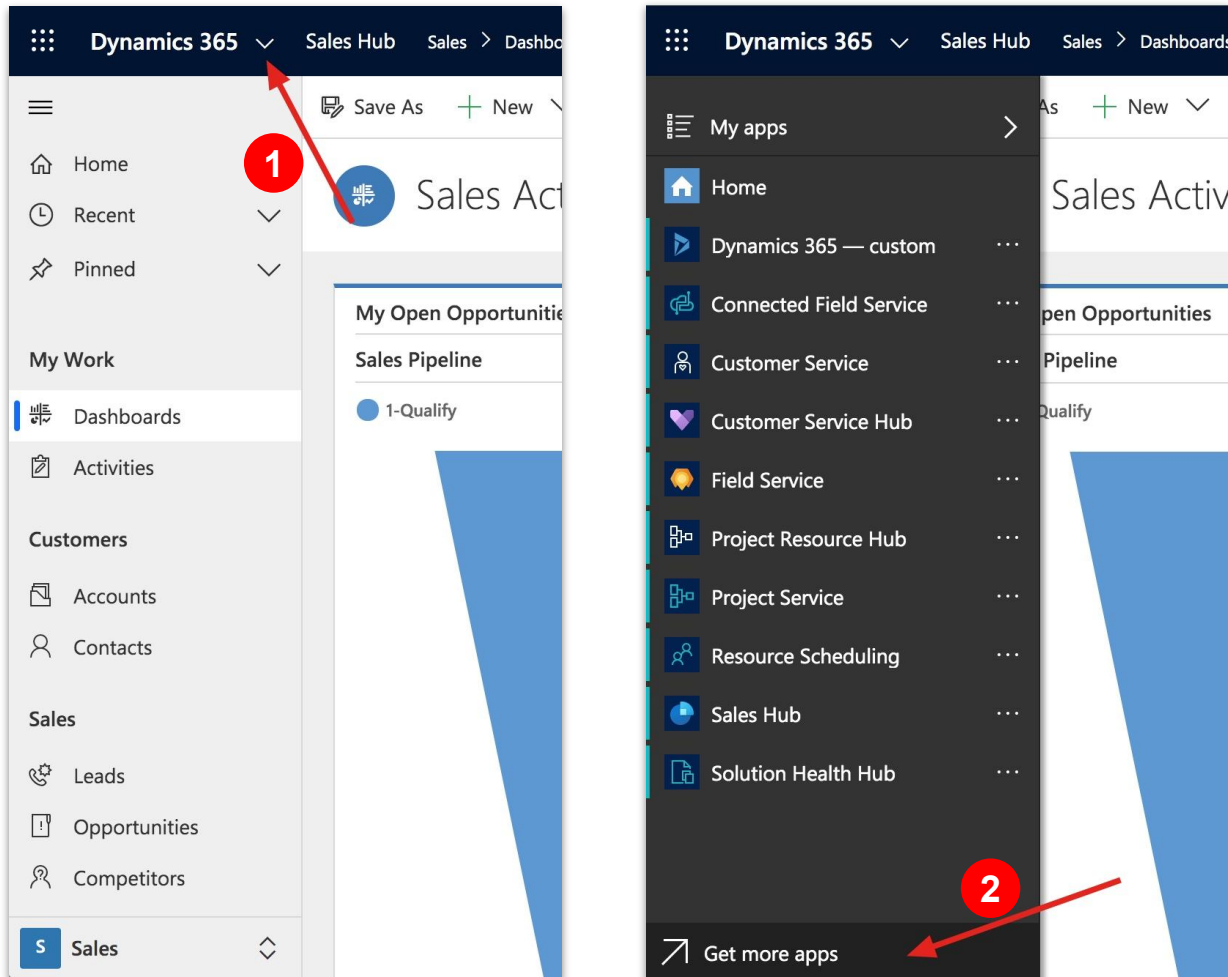
**Install from New**

# Install from new - steps



# Step 1: Install CIF

## 1.1. Search in AppSource



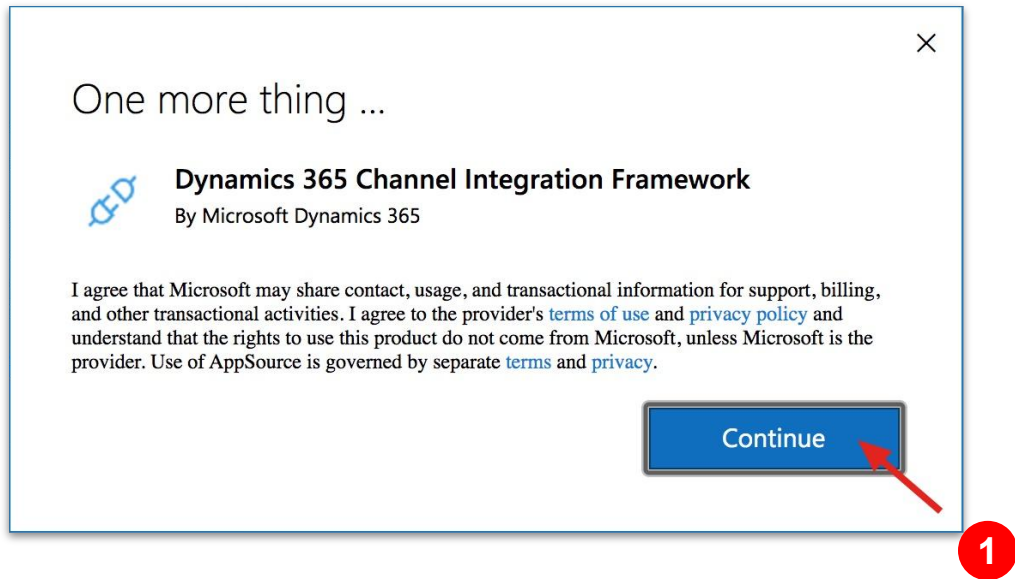
1 & 2 Open AppSource

3 Search “channel integration framework”

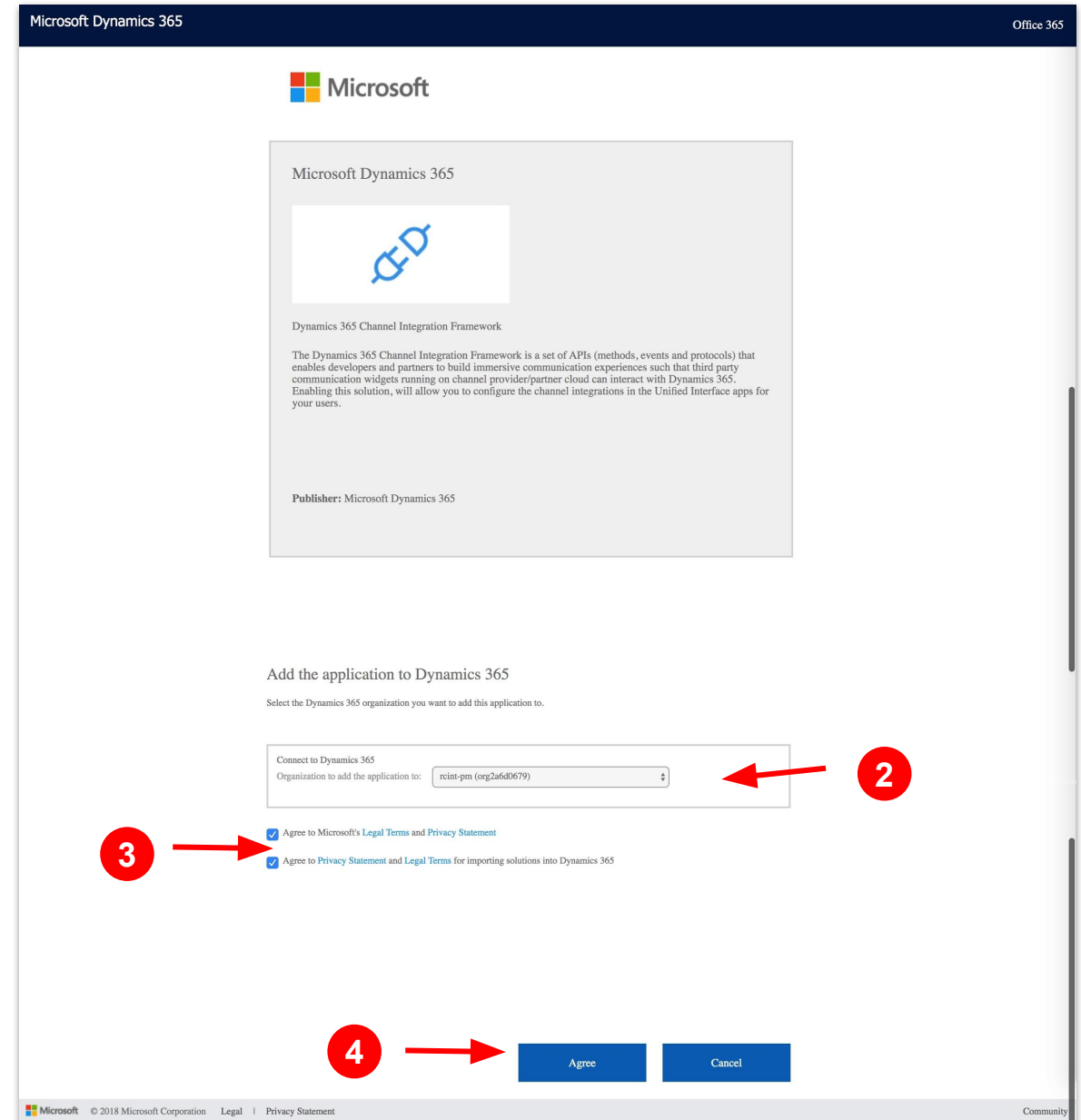
4 Click “Get it now”

# Step 1: Install CIF

## 1.2. Install CIF




1. Click "Continue" if you want to install CIF
2. Choose the Organization where CIF is to be active
3. Review the terms details from Microsoft.
4. Click "Agree" to continue





# Step 1: Install CIF

## 1.2. Install CIF




# Dynamics 365 Administration Center

There's a better way to manage your instances. [Try the new Admin center](#)

**INSTANCES** | **UPDATES** | **SERVICE HEALTH** | **BACKUP & RESTORE** | **APPLICATIONS**


## Manage your solutions

 **Manage your solutions**

Select a preferred solution to manage on selected instance: **rcint-pm**

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
8x8Integration	0.3.3.0	9/16/2020	Not installed
AI Solution Anchor	1.9.3.7	1/1/2050	Upgrade available
Channel API Integration F...	9.1.0.291	1/1/2050	Installation pending
Common Data Service Sta...	9.2.10.10	1/1/2050	Not installed
Company News Timeline	9.0.1.716	1/1/2050	Not installed
Crm Hub	1.0.20170908.55	1/1/2050	Not installed
Customer Service Hub	9.0.19094.1010	1/1/2050	Installed
Dynamics 365 Company	2.0.59	1/1/2050	Not installed
Dynamics 365 Connector f...	1.13.10019.1004	1/1/2020	Not installed
Dynamics 365 Customer S...	2.0.0.4	1/1/2050	Installed

### Channel API Integra...

 Please wait while installation starts. This may take a few minutes.

Bring your communication channels and build immersive experience with Dynamics 365

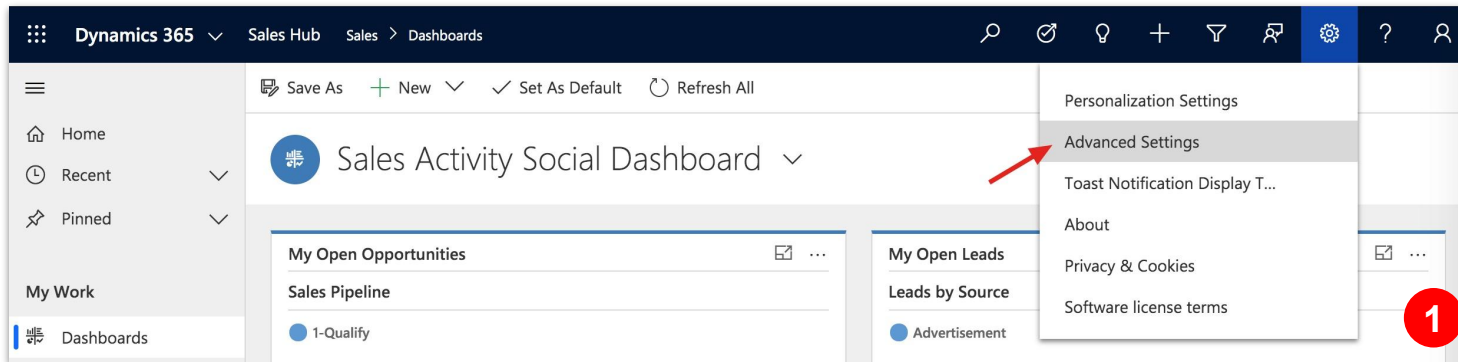
Created by: Microsoft  
[Learn more](#)

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
8x8Integration	0.3.3.0	9/16/2020	Not installed
AI Solution Anchor	1.9.3.7	1/1/2050	Upgrade available
Channel API Integration F...	9.1.0.291	1/1/2050	Installed
Common Data Service Sta...	9.2.10.10	1/1/2050	Not installed

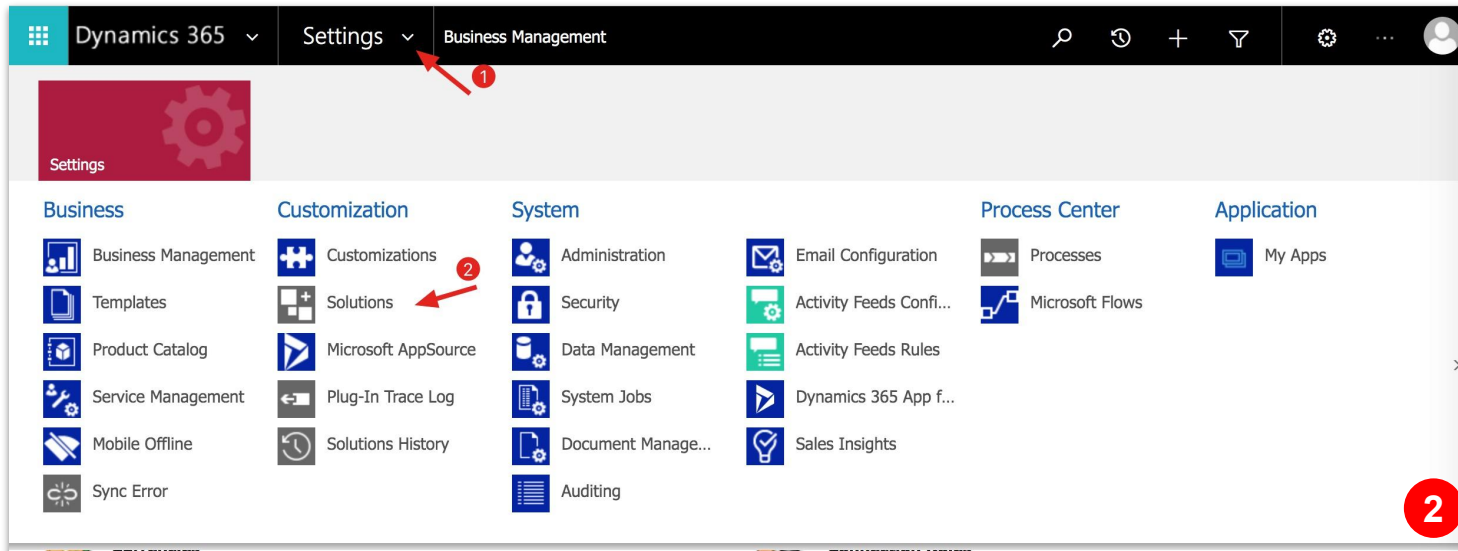
1. CIF will start installing. The STATUS will be updated once complete. Please note: The time required for installation depends on Microsoft server and also your network.
2. Once the STATUS is “Installed”, the CIF installation is done.
3. Now you can start importing RingCentral for Dynamics.

# Step 2: Import RC for Dynamics

## 2.1. Go to Dynamics Solutions view

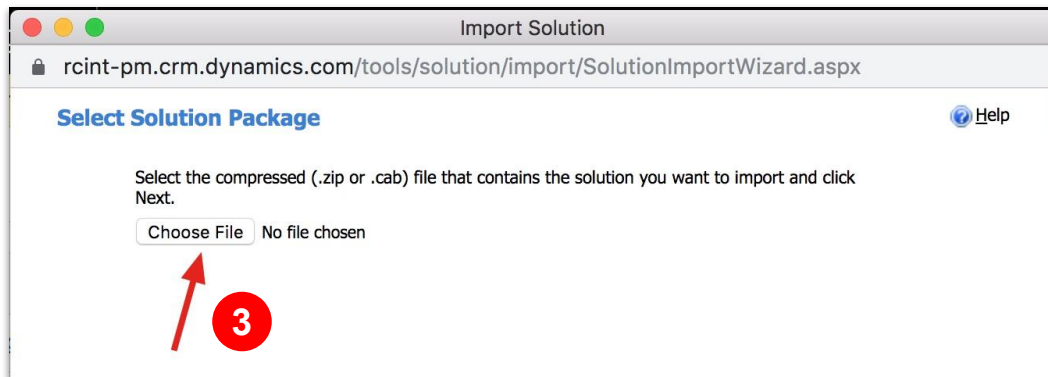
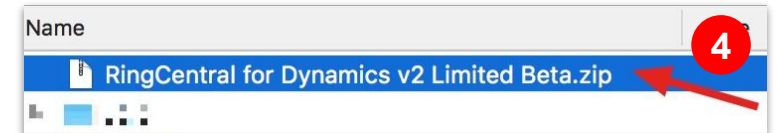
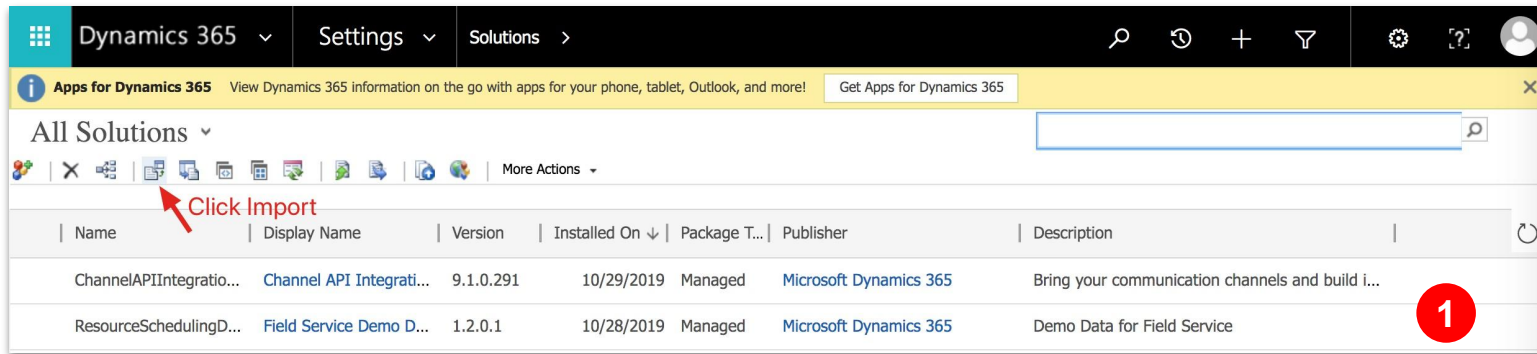


1. Click “Setting” -> “Advanced Settings.”
2. Advance Settings tab will be opened. Click the dropdown icon in “Settings”, and click “Solutions.”



# Step 2: Import RC for Dynamics

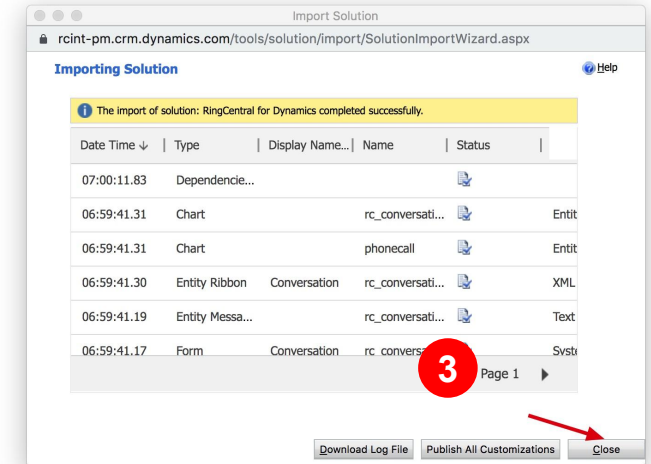
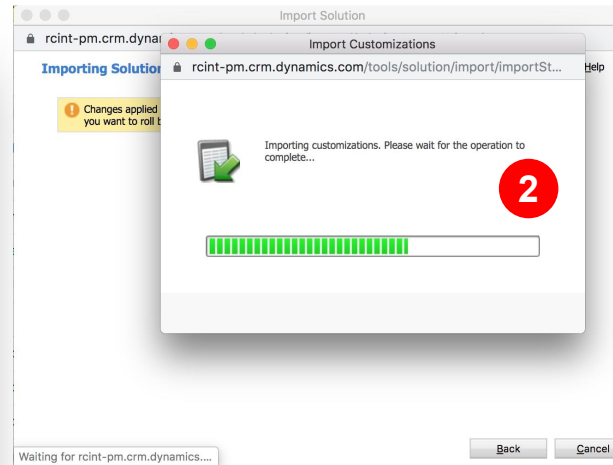
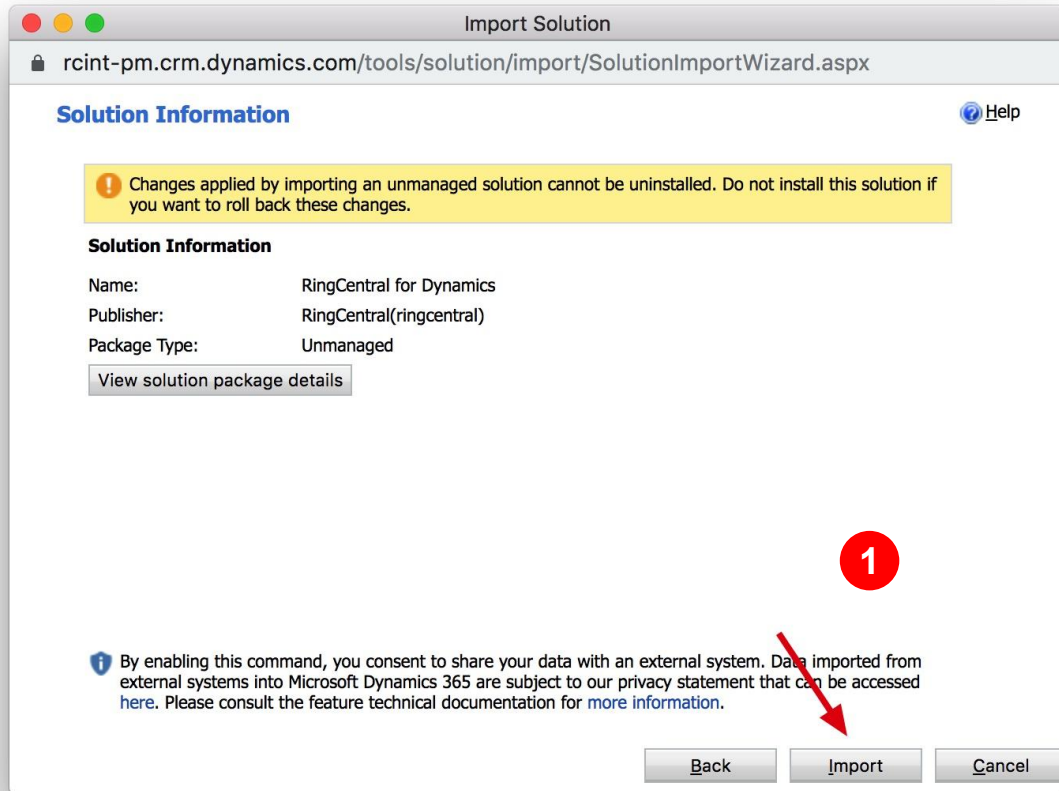
## 2.2. Import the RingCentral Solution package 1/2



1. In Solutions page, you can see a lot of pre-installed solutions by Dynamics. Click the “Import” button to continue.
2. Notice that popup window in browser is required so please allow.
3. In the Import Solution pop up window, click the “Choose File” button.
4. Choose the .zip package provided by RingCentral, then click “Next.”

# Step 2: Import RC for Dynamics

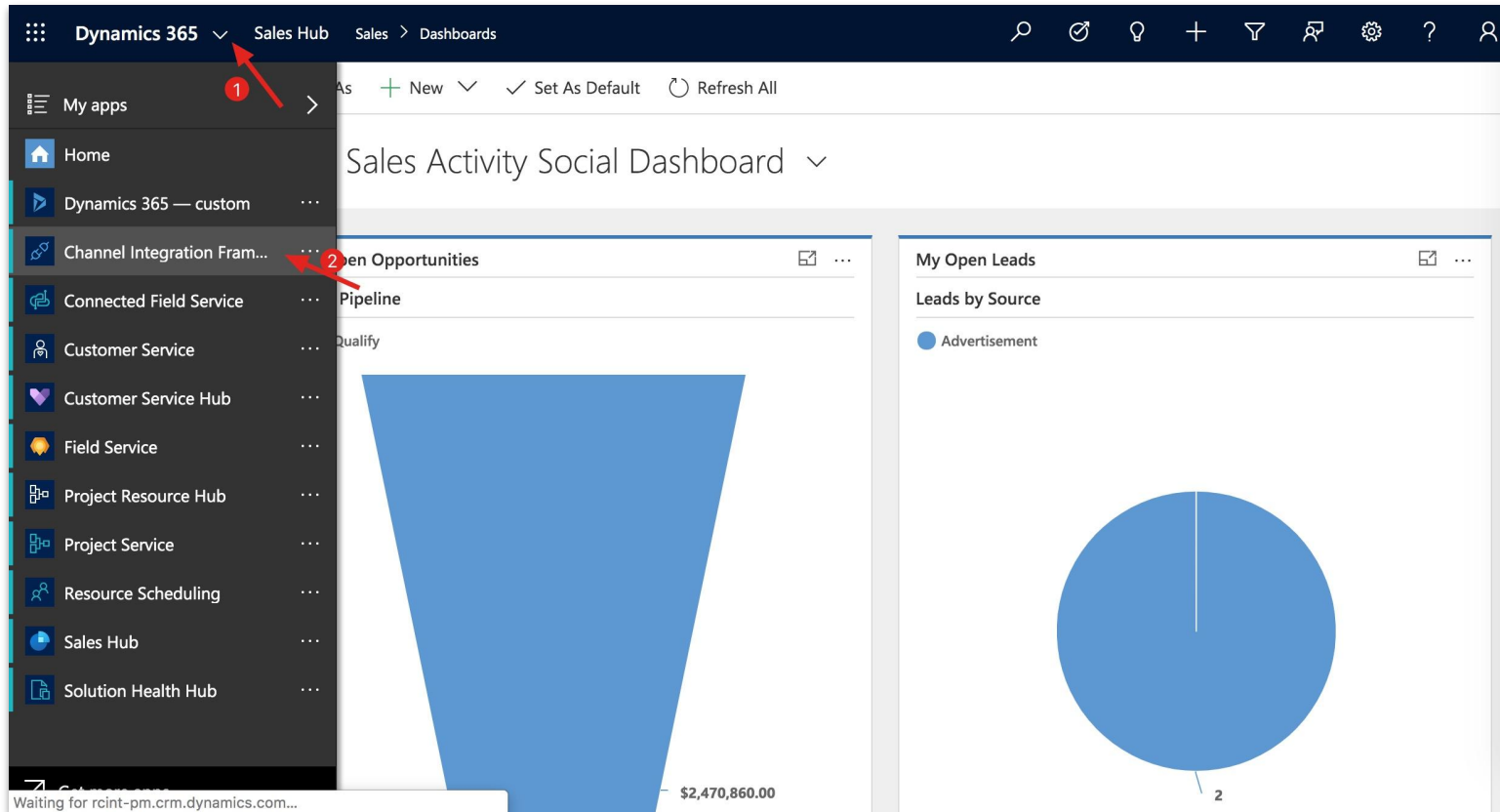
## 2.2. Import the RingCentral Solution package 2/2



1. Click “Import” button to start importing RingCentral solutions package.
2. The time needed for importing depends on network and server performance
3. Once import is complete, click “Close” button to finish the process.

# Step 3: Enable RingCentral for Dynamics

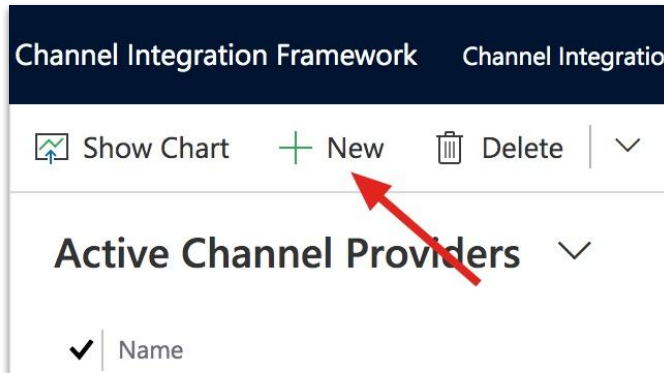
## 3.1. Go to Channel Integration Framework



1. Refresh your main window, click the dropdown icon next to Dynamics 365, you should see “Channel Integration Framework” listed as an App.
2. Click it to go to CIF view.

# Step 3: Enable RingCentral for Dynamics

## 3.2. Add active channel provider



1. Click “New” button to create a new CIF provider.
2. A new table will be opened. Once this form was finished, the CIF configuration was done.

The screenshot shows the 'New Channel Provider' configuration form. The form has a title bar with 'Save', 'Save & Close', 'New', and 'Flow' buttons. The main title is 'New Channel Provider'. Below the title is a section titled 'Channel Provider Configuration'. This section contains a form with the following fields:

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

To the right of the configuration form is a section titled 'Select Unified Interface Apps for the Channel'. It contains a text input field with the placeholder 'Enter text here' and a dropdown arrow.



# Step 3: Enable RingCentral for Dynamics

## 3.3. Tips for the form 1/2

The screenshot shows the 'New Channel Provider' configuration form in the RingCentral interface. The left sidebar contains navigation links: Home, Recent, Pinned, Channel Provider Configuration, and Channel Providers. The main form area is titled 'New Channel Provider' and 'Channel Provider Configuration'. It includes a top bar with 'Save', 'Save & Close', 'New', and 'Flow' options. The form is divided into two main sections: 'Channel Provider Configuration' and 'Select Unified Interface Apps for the Channel'. The 'Channel Provider Configuration' section contains fields for Name, Label, Channel URL, Enable Outbound Communication, Channel Order, API Version, Trusted Domain, and Custom Parameters. The 'Select Unified Interface Apps for the Channel' section contains a list of apps: Connected Field Service, Customer Service Hub, Field Service, Project Resource Hub, Project Service, and Resource Scheduling. Below this list is a text input field labeled 'Enter text here' and a '2 more' link. The bottom of the form has a status bar with 'Active', 'unsaved changes', and 'Save' buttons.

Field	Value
Name	RingCentral
Label	RingCentral for Dynamics v2
Channel URL	https://rcint-pm.crm.dynamics.com/...
Enable Outbound Communication	Yes
Channel Order	0
API Version	1.0
Trusted Domain	---
Custom Parameters	---

Select Unified Interface Apps for the Channel

- Connected Field Service x
- Customer Service Hub x
- Field Service x
- Project Resource Hub x
- Project Service x
- Resource Scheduling x

Enter text here

2 more

Select the Roles for the Channel

Enter text here

Active | unsaved changes | Save

Name: RingCentral

Label: RingCentral for Dynamics v2

Enable Outbound Communication: Yes

Channel Order: 0

Select Unified Interface Apps for Channel: Select the Apps that you wish to enable for RingCentral for Dynamics v2

Select the Roles for Channel: Select the user roles that you wish to allow to use for RingCentral for Dynamics v2


Channel URL: See next page

# Step 3: Enable RingCentral for Dynamics

## 3.3. Tips for the form 2/2

### New Channel Provider

#### Channel Provider Configuration

Name	*	RingCentral
Label	*	RingCentral for Dynamics v2
Channel URL	*	https://rcint-pm.crm.dynamics.com/... 
Enable Outbound Communication	*	Yes
Channel Order	*	0
API Version		1.0

The Channel URL points to the App provided by RingCentral solution (the package you imported in Step 2).

The format of the URL is

[https://XXXX.YYYY.dynamics.com/WebResources/RingCentral\\_/adapter.html#](https://XXXX.YYYY.dynamics.com/WebResources/RingCentral_/adapter.html#)

**XXXX.YYYY** is the org code of your Dynamics site. Check the current address of your browser.

For example, See browser address below

 rcint-pm.crm.dynamics.com/m

so the **XXXX.YYYY** in this case, equals to **rcint-pm.crm**. So the site is

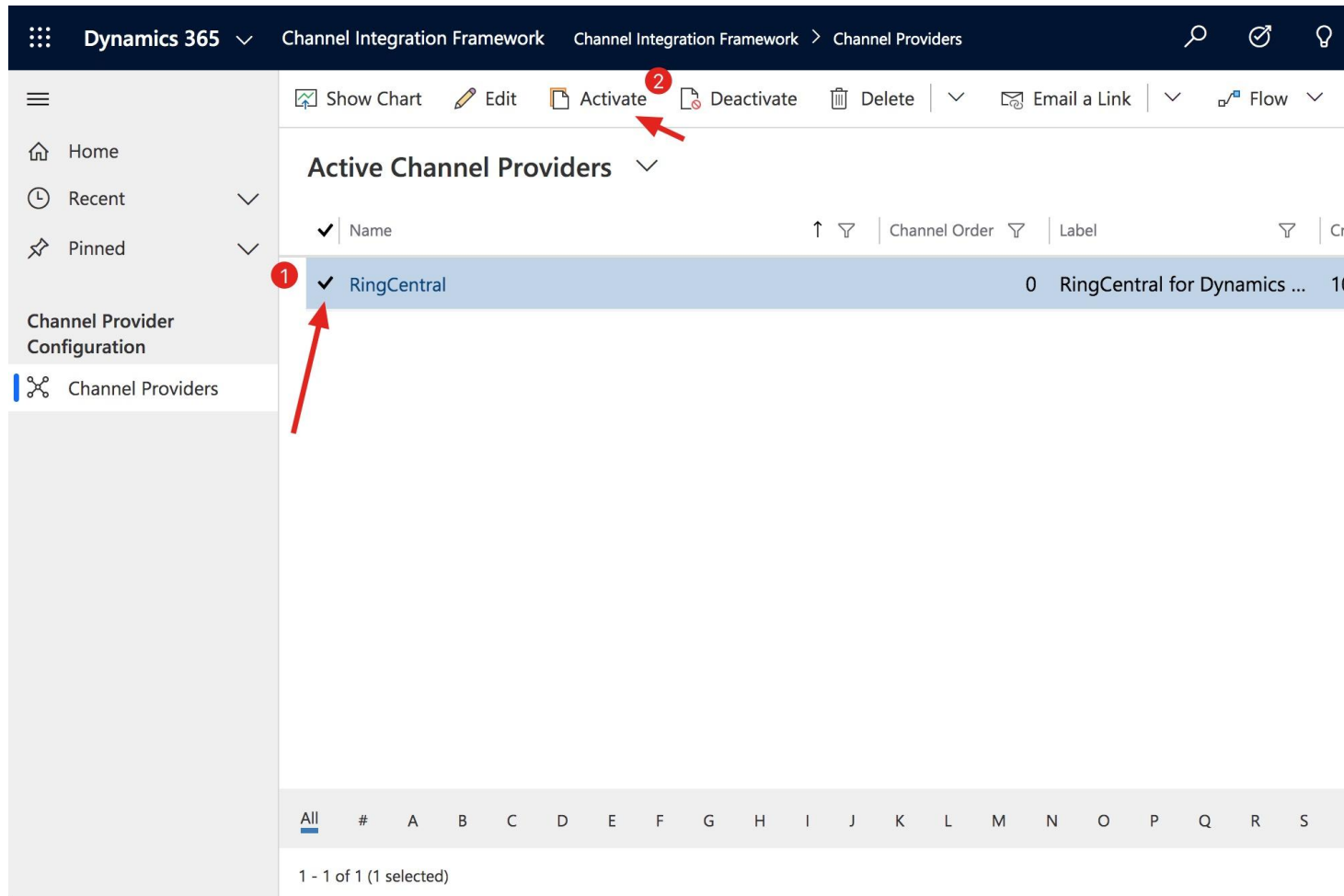
[https://rcint-pm.crm.dynamics.com/WebResources/RingCentral\\_/adapter.html#](https://rcint-pm.crm.dynamics.com/WebResources/RingCentral_/adapter.html#)

Put the full link in the field, and click Save button on the right bottom corner.

\* Please add # in the end of the URL to be compatible with a higher CIF version

# Step 3: Enable RingCentral for Dynamics

## 3.4. Activate the App



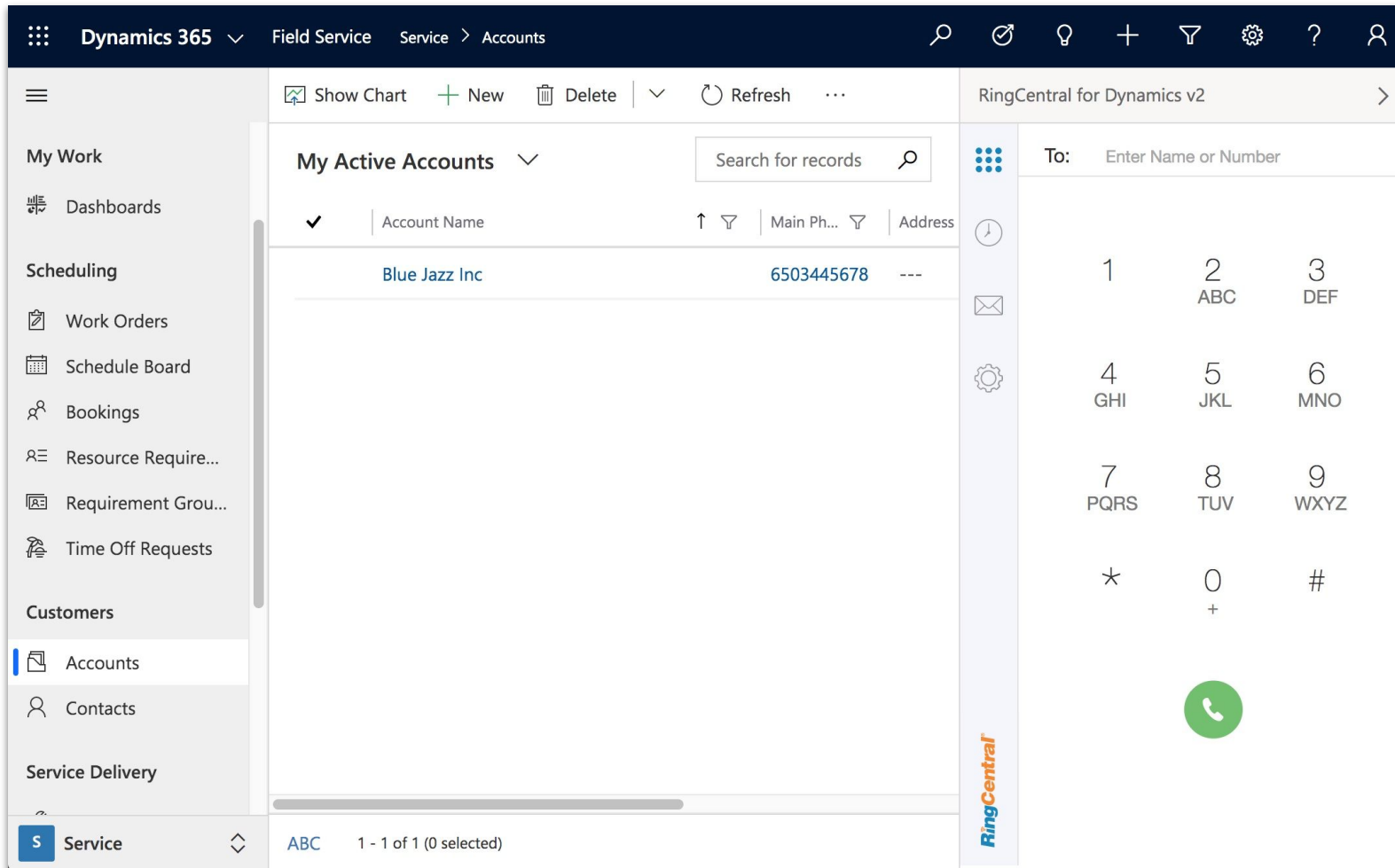
The screenshot shows the Dynamics 365 interface for managing Channel Providers. The breadcrumb trail is: Dynamics 365 > Channel Integration Framework > Channel Integration Framework > Channel Providers. The left sidebar shows the navigation menu with 'Channel Providers' selected. The main area displays the 'Active Channel Providers' section. A table lists the active providers, with 'RingCentral' selected. A red arrow labeled '1' points to the 'RingCentral' entry in the table. Another red arrow labeled '2' points to the 'Activate' button in the top toolbar. The table has columns for Name, Channel Order, Label, and a 'Create' button. The 'RingCentral' entry shows a '0' in the Channel Order column and 'RingCentral for Dynamics ...' in the Label column. The bottom of the table shows '1 - 1 of 1 (1 selected)'.

✓	Name	Channel Order	Label	Cre
✓	RingCentral	0	RingCentral for Dynamics ...	10

In some cases, the CIF does not show up in Apps. If this case, re-activate to make it appear.

# Step 3: Enable RingCentral for Dynamics

## 3.5. Run CIF in United Interface apps



To run CIF, open any United Interface Apps that you selected in Step 3.2 to see the CIF framework with RingCentral for Dynamics.

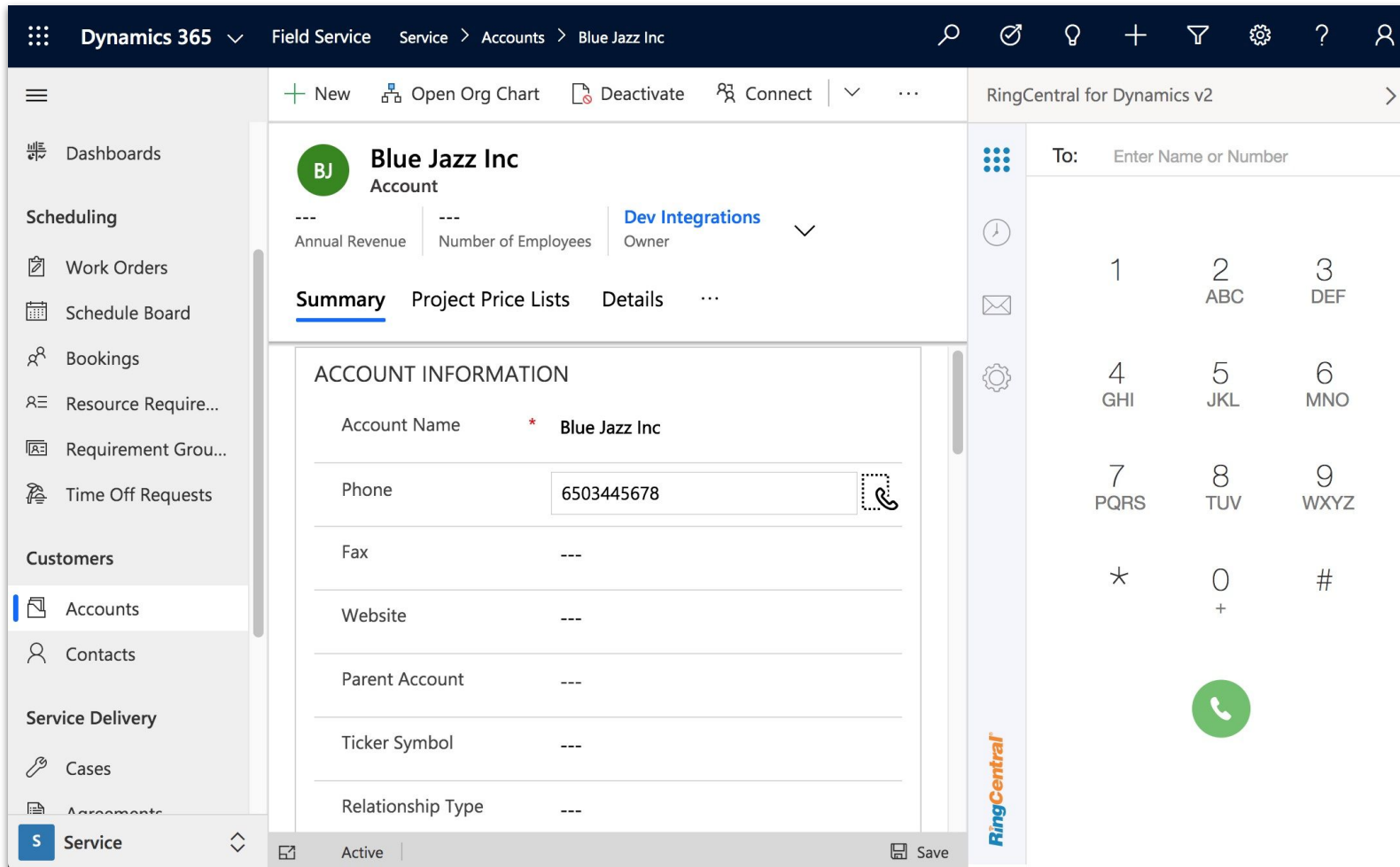
To learn how to use the app, please refer to the User Guide.

**Notices:** *CIF is also a new product in Microsoft, it could have bugs. We had seen several times that the CIF didn't show up in a selected app. If you run into similar case, please let us know.*

*More voices could help driving Microsoft to improve their product as well.*

# Step 4: Enable Click to Dial with RingCentral

## Description



The screenshot shows the Dynamics 365 interface for the 'Blue Jazz Inc' account. The left sidebar contains navigation options like Dashboards, Scheduling, Work Orders, Schedule Board, Bookings, Resource Require..., Requirement Grou..., Time Off Requests, Customers, Accounts, Contacts, Service Delivery, Cases, Agreements, and Service. The main content area displays the 'Blue Jazz Inc' account details, including 'Annual Revenue', 'Number of Employees', and 'Owner'. The 'Summary' tab is selected, showing 'ACCOUNT INFORMATION' with fields for 'Account Name', 'Phone', 'Fax', 'Website', 'Parent Account', 'Ticker Symbol', and 'Relationship Type'. The 'Phone' field is highlighted with a 'Call' icon. The right sidebar shows the 'RingCentral for Dynamics v2' extension, which includes a 'To:' field and a numeric keypad for dialing. A green 'Call' button is visible at the bottom of the keypad.

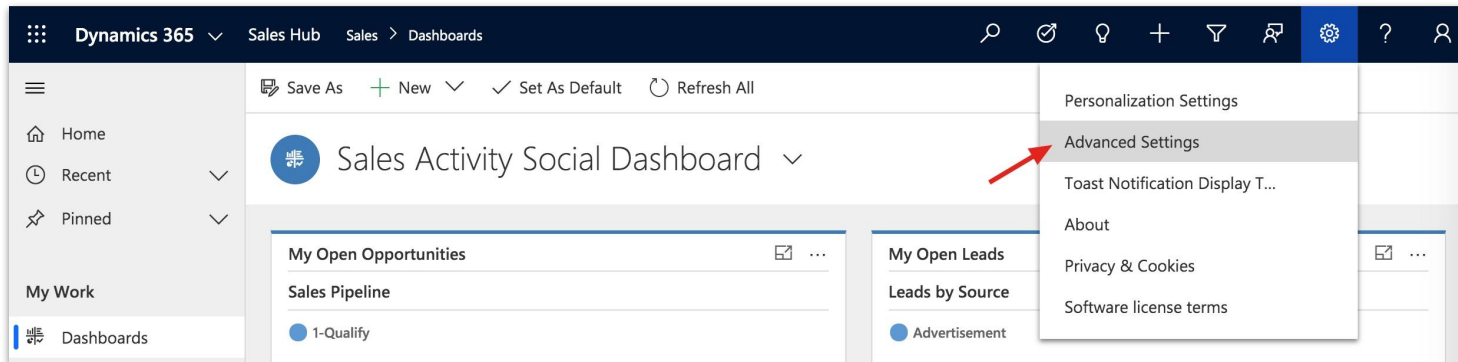
Click to Dial from Phone fields in targeted pages is now available by CIF.

With this feature on, you can click the “Call” icon next to a phone field, and make a call by RingCentral.

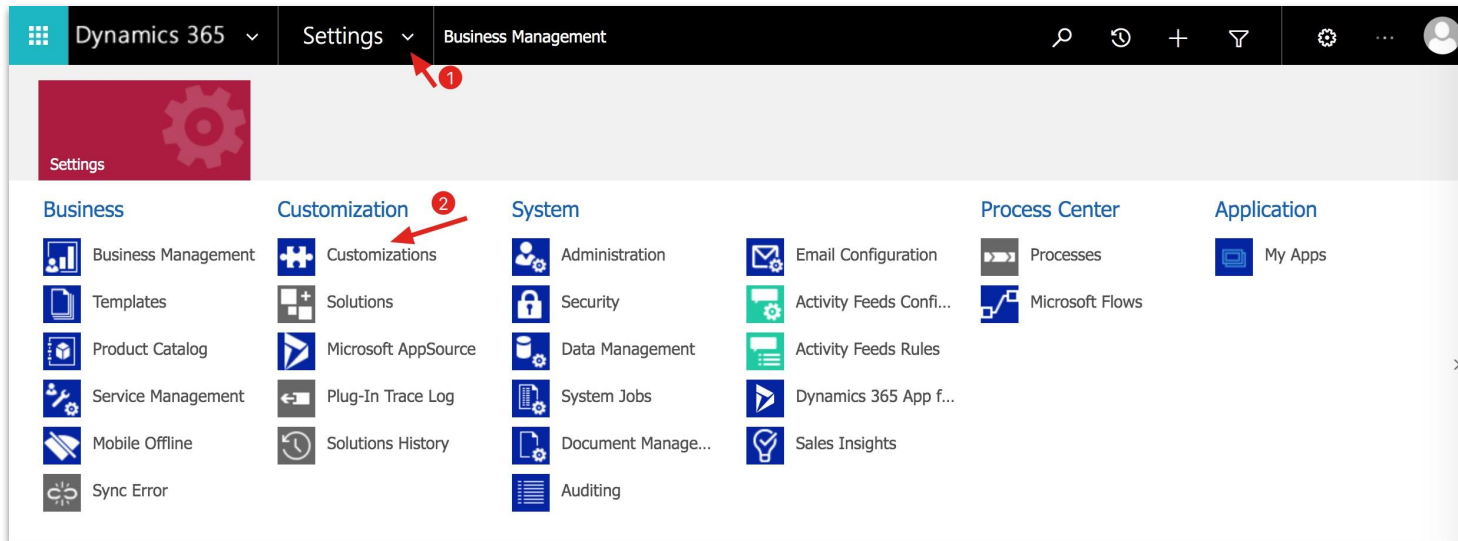
**Note: it must be a phone field. and it must be configured in advance.**

# Step 4: Enable Click to Dial with RingCentral

## Step 4.1. Go to Customizations



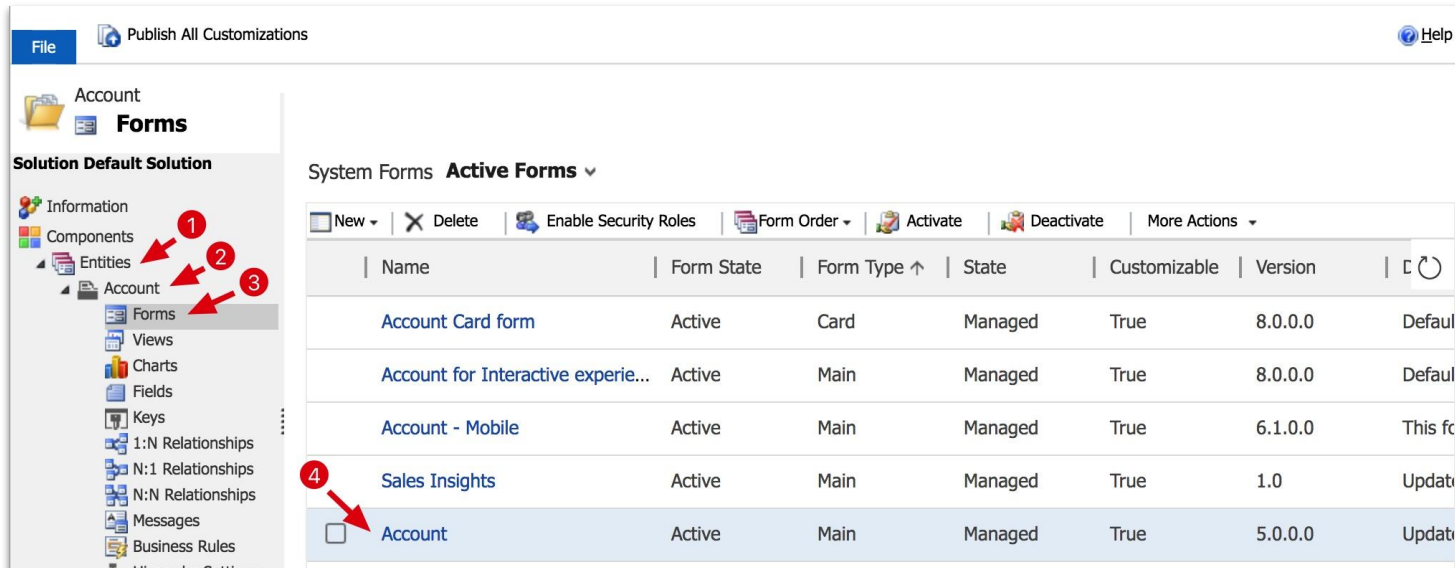
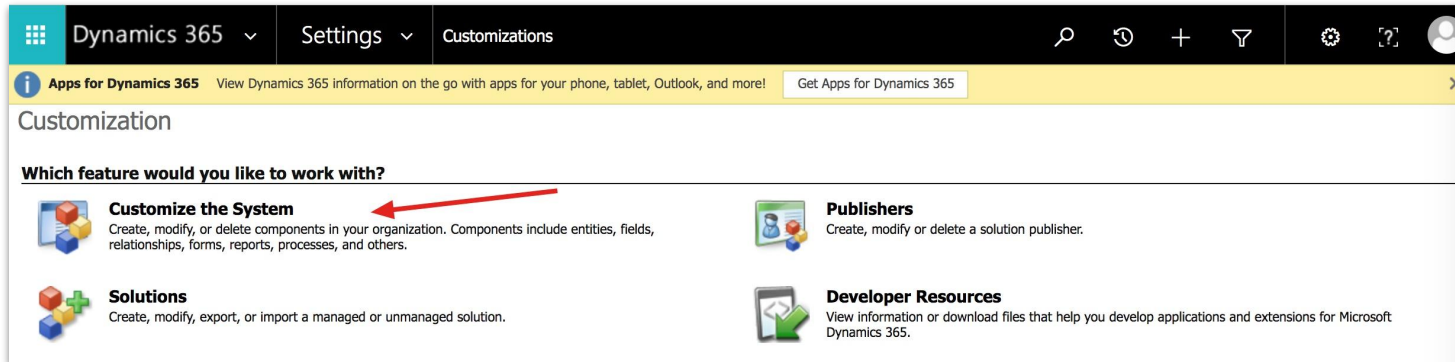
1. Click “Setting” gear icon, select “Advanced Settings” from the list.
2. Click the drop down icon next to “Settings”, and click “Customizations” item.





# Step 4: Enable Click to Dial with RingCentral

## Step 4.2. Lookup the page you want to customize



1. Click the item “Customize the System”, a new window will pop up.
2. On the tree menu,
  - a. Expand “Entities”
  - b. Select the entity you want to configure and expand it (in this case, we choose Account entity)
  - c. Select “Forms”
  - d. In the Forms view, you can see the forms that belong to this entity. This customizes the main page of Account.

**Note:** A form can be considered a page in Dynamics. Let's take Account for example. You might have many ways to view the account data: the account page, the account card, etc. In this page Dynamics lists all the views.

**If you want to enable Click 2 Dial in multiple pages of this entity, you will need to customize them all.**

# Step 4: Enable Click to Dial with RingCentral

## Step 4.3. Customize a field in a page 1/2

Summary

ACCOUNT INFORMATION

Account Name \*

Account Name

Phone

Main Phone

SOCIAL PANE

Relationship Assistant

Double Click

1. Double click the field (must be a phone field), and a pop up page will appear.
2. In the pop up page, click the "Controls" tab, and click "Add Control."

Field Properties

Modify this field's properties.

Display Formatting Details Events Business Rules Controls

Control	Web	Phone	Tablet
Text Box (default)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Add Control...</u>			

# Step 4: Enable Click to Dial with RingCentral

## Step 4.3. Customize a field in a page 2/2

### Field Properties

Modify this field's properties.

Display

Formatting

Details

Events

Business Rules

Controls

Control	Web	Phone	Tablet
Text Box (default)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Channel Communication Control	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
<a href="#">Add Control...</a>			

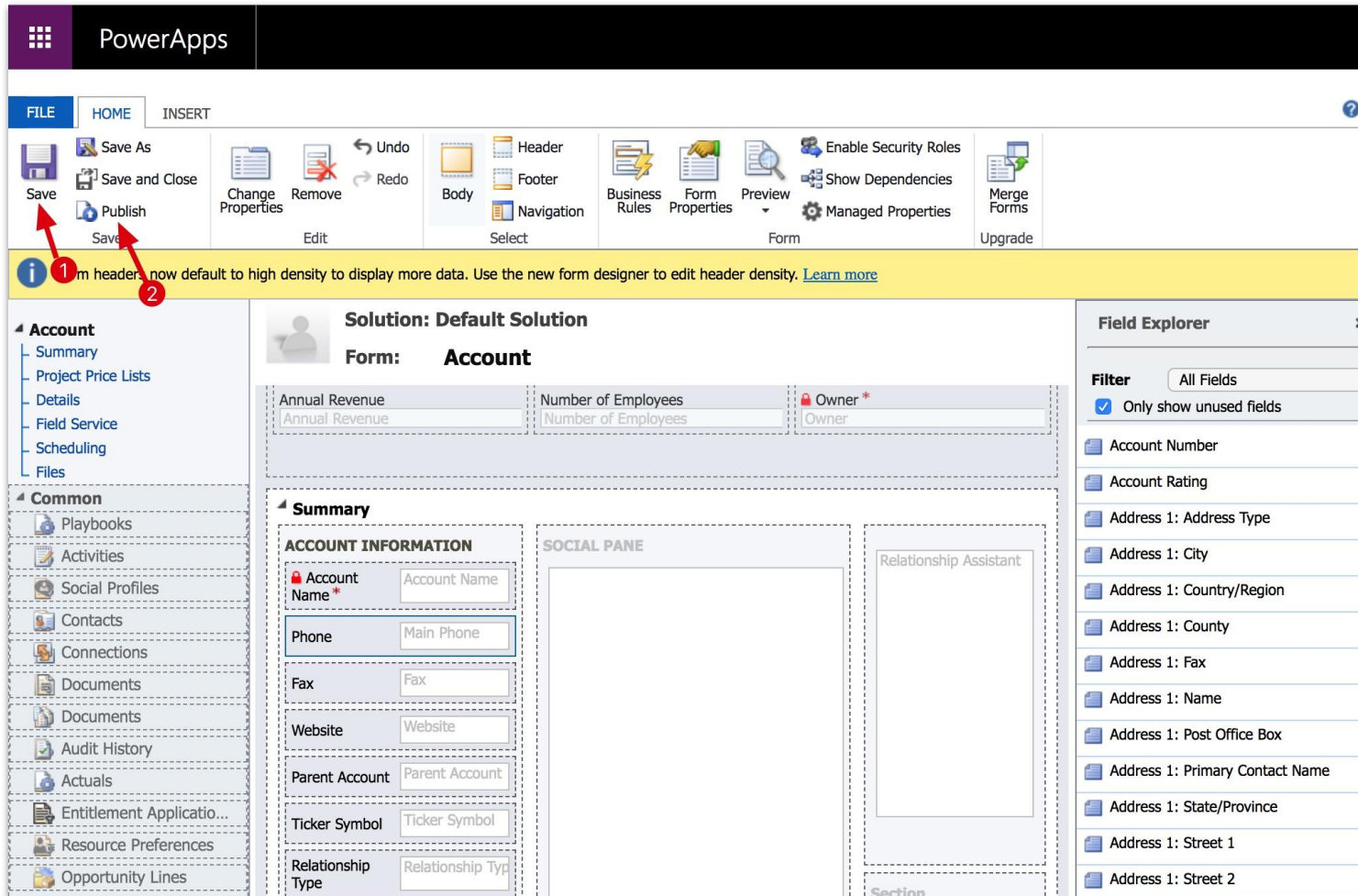
Channel Communication Control

Property	Value
Value *	telephone1

1. Switch the radio button for Web, Phone, and Tablet to Channel Communication Control.
2. Save and Close the page.

# Step 4: Enable Click to Dial with RingCentral

## Step 4.4. Save and publish



1. Return to main page, click “Save” and then “Publish.”
2. Go the Account page, you will find the call button turn from



Now you have Click to Dial enabled.

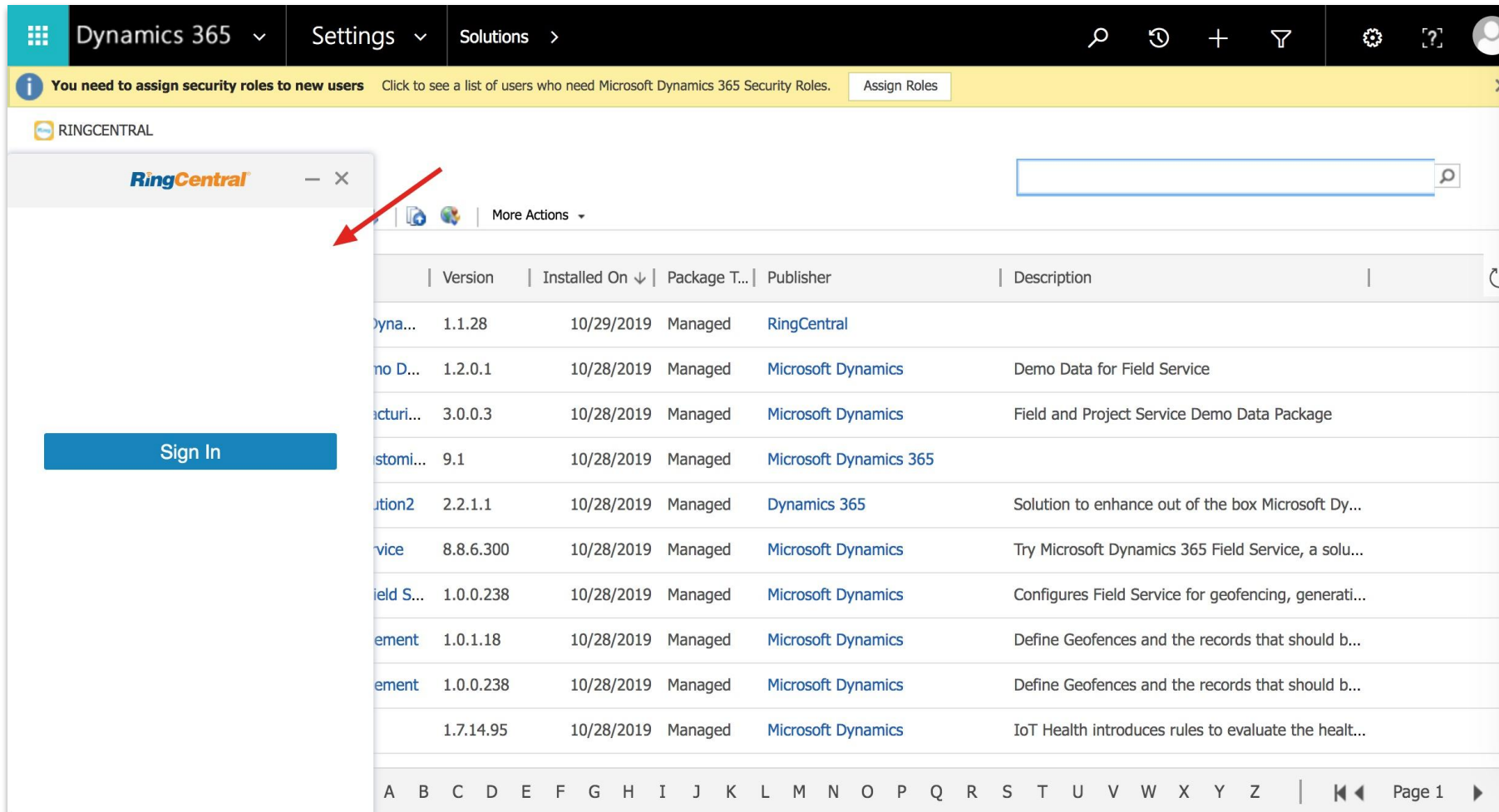
You can configure all the required fields in all entities to enable Click to Dial, but remember, it must be a Phone field.



**Install from RingCentral for Dynamics v1.x**

# Overview of RingCentral for Dynamics v1.x

## How it looks



The screenshot shows the Microsoft Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this, a yellow banner states 'You need to assign security roles to new users'. The left sidebar contains the 'RingCentral' app icon and a 'Sign In' button. The main area displays a table of installed apps.

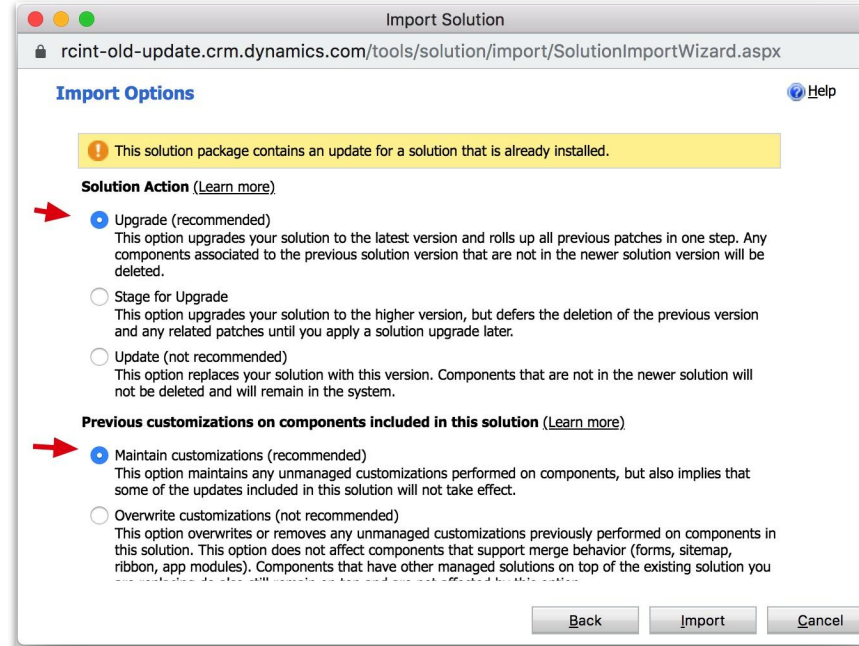
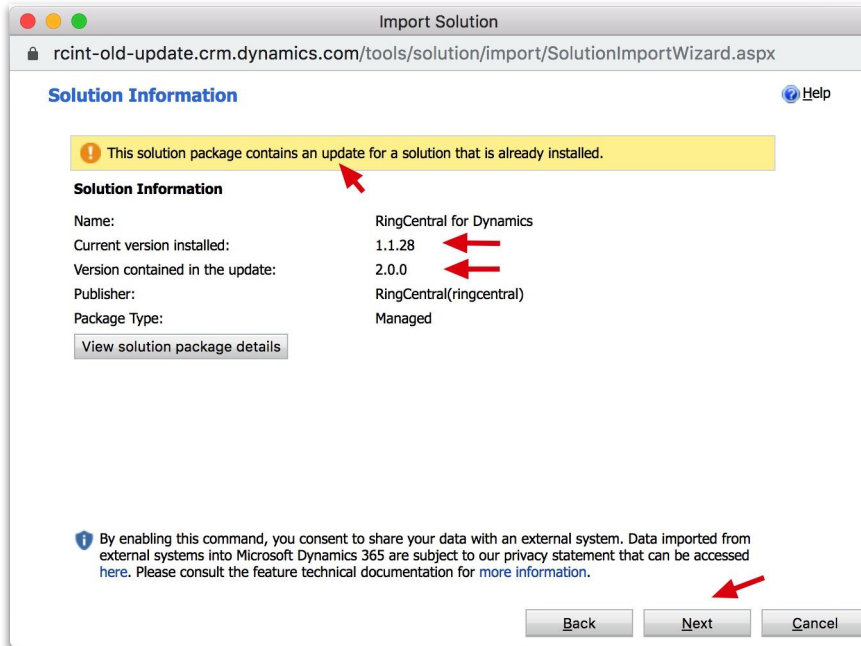
	Version	Installed On	Package T...	Publisher	Description
dyna...	1.1.28	10/29/2019	Managed	RingCentral	
no D...	1.2.0.1	10/28/2019	Managed	Microsoft Dynamics	Demo Data for Field Service
ecturi...	3.0.0.3	10/28/2019	Managed	Microsoft Dynamics	Field and Project Service Demo Data Package
stomi...	9.1	10/28/2019	Managed	Microsoft Dynamics 365	
ution2	2.2.1.1	10/28/2019	Managed	Dynamics 365	Solution to enhance out of the box Microsoft Dy...
vice	8.8.6.300	10/28/2019	Managed	Microsoft Dynamics	Try Microsoft Dynamics 365 Field Service, a solu...
field S...	1.0.0.238	10/28/2019	Managed	Microsoft Dynamics	Configures Field Service for geofencing, generati...
ement	1.0.1.18	10/28/2019	Managed	Microsoft Dynamics	Define Geofences and the records that should b...
ement	1.0.0.238	10/28/2019	Managed	Microsoft Dynamics	Define Geofences and the records that should b...
	1.7.14.95	10/28/2019	Managed	Microsoft Dynamics	IoT Health introduces rules to evaluate the healt...

1. If you have the v1.x version installed, you will find the App on your Dynamics interface. However, due to the change of the Dynamics Technology Framework, some features may not be available.
2. RingCentral for Dynamics v1.x can be upgraded to v2.x without uninstalling.



# Installing from Old

## The difference

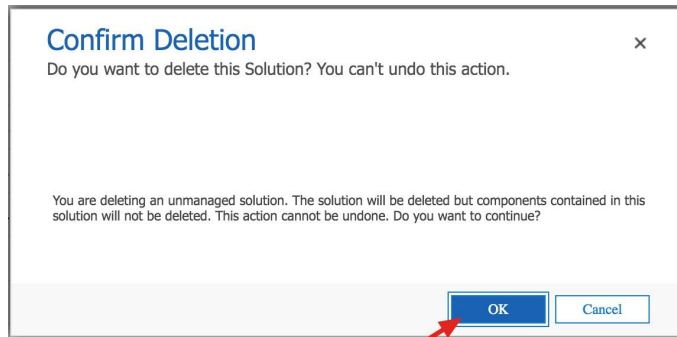
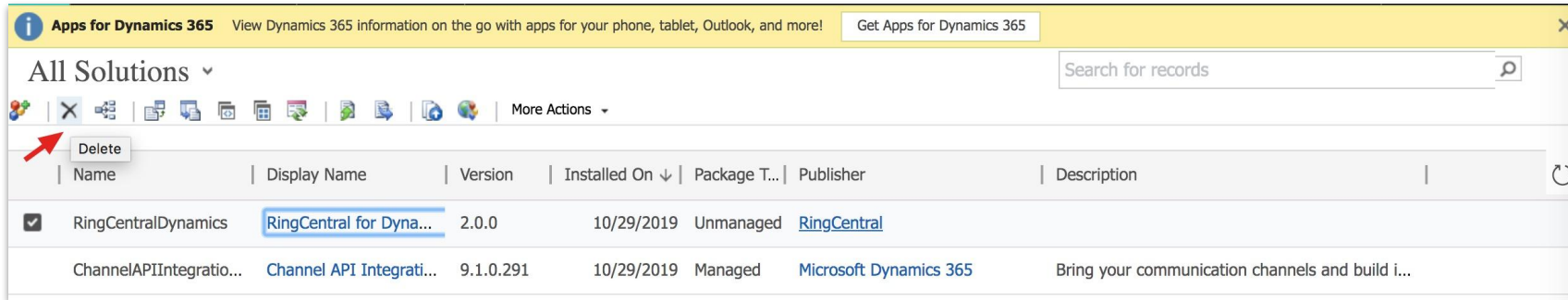


1. Follow the same steps as installing from new detailed in Step 1.
2. When you reach Step 2.2, you will see different popup info illustrated here.
3. Confirm and click Next and Import.
4. Remaining steps are the same as install from new scenario.

Uninstall

# To Uninstall

## Uninstall Solution



1. Go to Solutions
2. Find the solution you want to delete, and select.
3. Click Delete button on top.
4. Click Confirm on popup page.

# To Uninstall

## Remove Record in CIF

The screenshot shows the Dynamics 365 interface for the Channel Integration Framework (CIF). The left sidebar contains navigation options: Home, Recent, Pinned, and Channel Provider Configuration. The main area displays the 'Active Channel Providers' list. The 'RingCentral' provider is selected, indicated by a red circle with the number 1. The 'Delete' button in the top toolbar is highlighted with a red circle and the number 2. A 'Confirm Deletion' dialog box is open, asking for confirmation to delete the selected provider. The dialog box contains the text: 'Do you want to delete this Channel Provider? You can't undo this action.' and has 'Delete' and 'Cancel' buttons.

Name	Label	Created On
✓ RingCentral	0 RingCentral fo...	10/29/2019 3:14 P...

1. Select record
2. Delete
3. Confirm delete and complete.





Thank You

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