

RingCentral for Dynamics V2 Admin Guide



Content

1. Install from AppSource and Configuration
2. Manually Install from package
3. Manually Update from v1.x
4. Uninstall

Install from AppSource



Install form AppSource Steps

1

Install CIF from
AppSource

2

Install RingCentral
for Dynamics from
AppSource

3

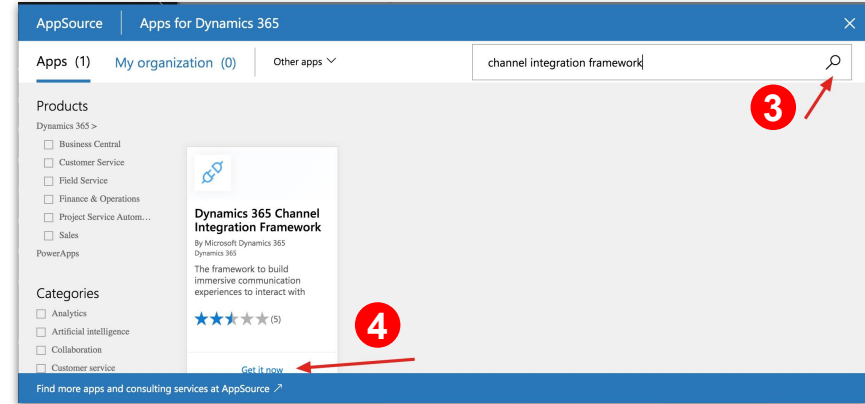
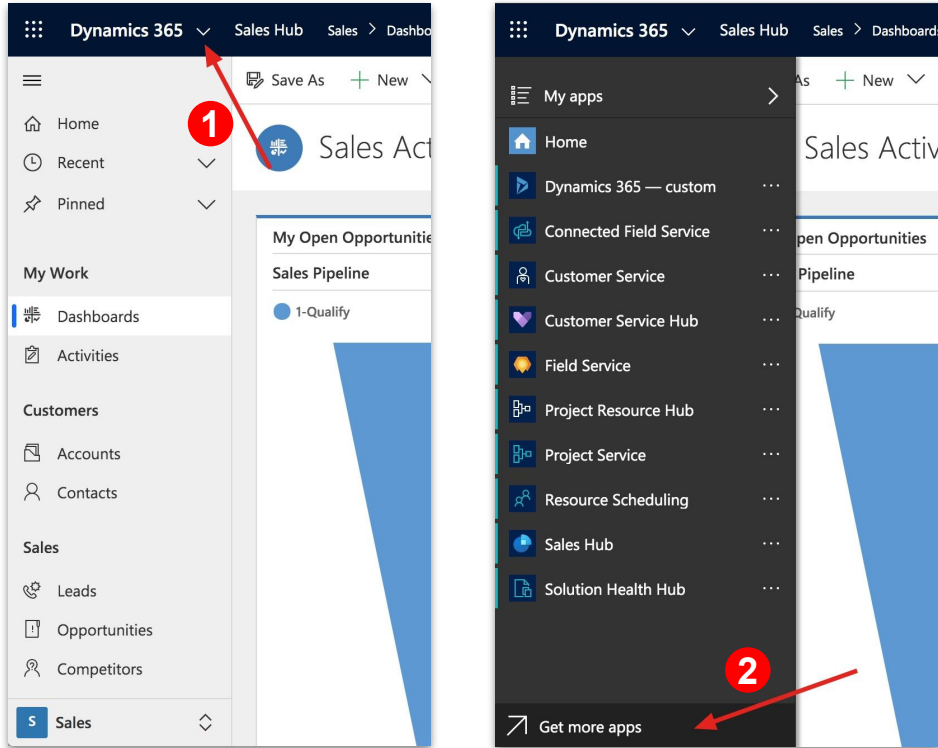
Configure CIF to
enable RingCentral

4

Configure Click to
Dial in Dynamics

Step 1: Install CIF

1.1 Search in AppSource



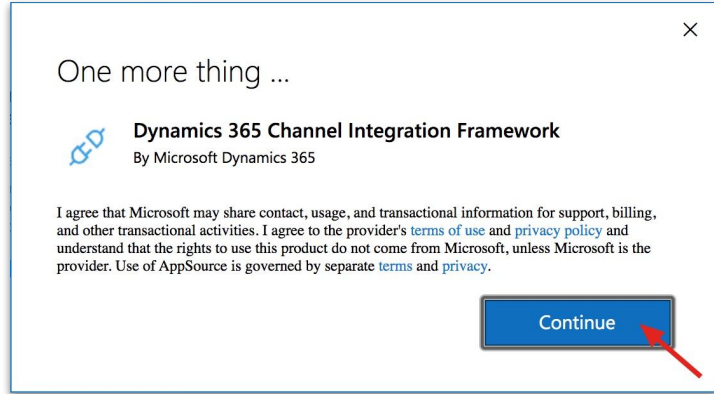
1 & 2 Open AppSource

3 Search “channel integration framework”

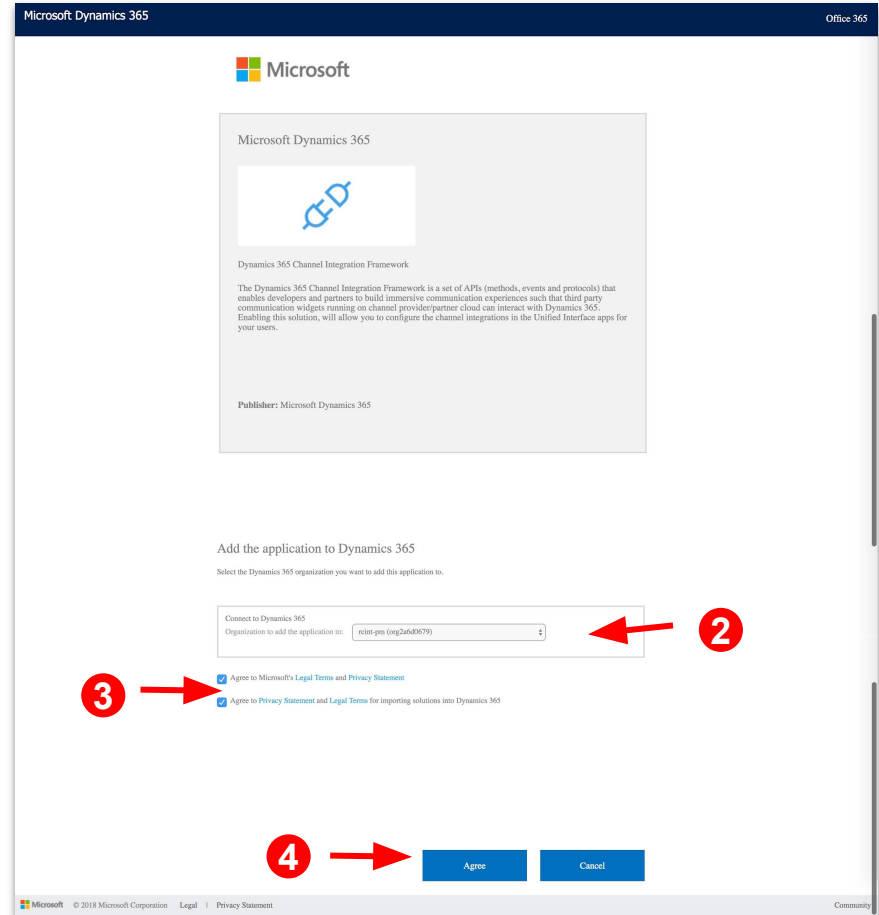
4 Click “Get it now”

Step 1: Install CIF

1.2 Install CIF 1/2



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



Step 1: Install CIF

1.2 Install CIF 2/2

Microsoft | Dynamics 365

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-prm**

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

1

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 installing RingCentral for Dynamics.

Step 2: Install RingCentral for Dynamics 365

Microsoft | AppSource More ▾

Apps > RingCentral for Dynamics 365

RingCentral for Dynamics 365

RingCentral

Dynamics 365 Sales Dynamics 365 Customer Service

Preferred solution

★ 3.0 (3 AppSource ratings)

Pricing Free Get it now

1

Power Platform admin center

To manage Power Apps and Power Automate re...

Dynamics 365 apps

See which apps are available to install and configure

Name ↑

- Ball-microsoft-integration
- Agent Productivity Tools
- App profile manager
- Business Central Virtual Table (preview)
- Cisco Webex Contact Center for Microsoft Dynamics 365
- Customer Insights customer card add-in (preview)
- Customer Service Team Member

2

Install RingCentral for Dynamics 365

Name

RingCentral for Dynamics 365

Description

RingCentral for Microsoft Dynamics 365 empowers reps and agents to streamline daily business workflows with business critical actions like: click to dial, inbound screen pops, and automatic call and SMS logging. Enhance your CRM experience and automate...

See more

Publisher

RingCentral

Select an environment *

RingCentral (default)

3

Don't see your environment?

☒ I agree to Microsoft's Legal Terms and Privacy Statement

☒ I agree to Privacy Statement and Legal Terms for importing packages into Dynamics 365

Install Cancel

Power Platform admin center

Environments > RingCentral (default) > Dynamics 365 apps

Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)

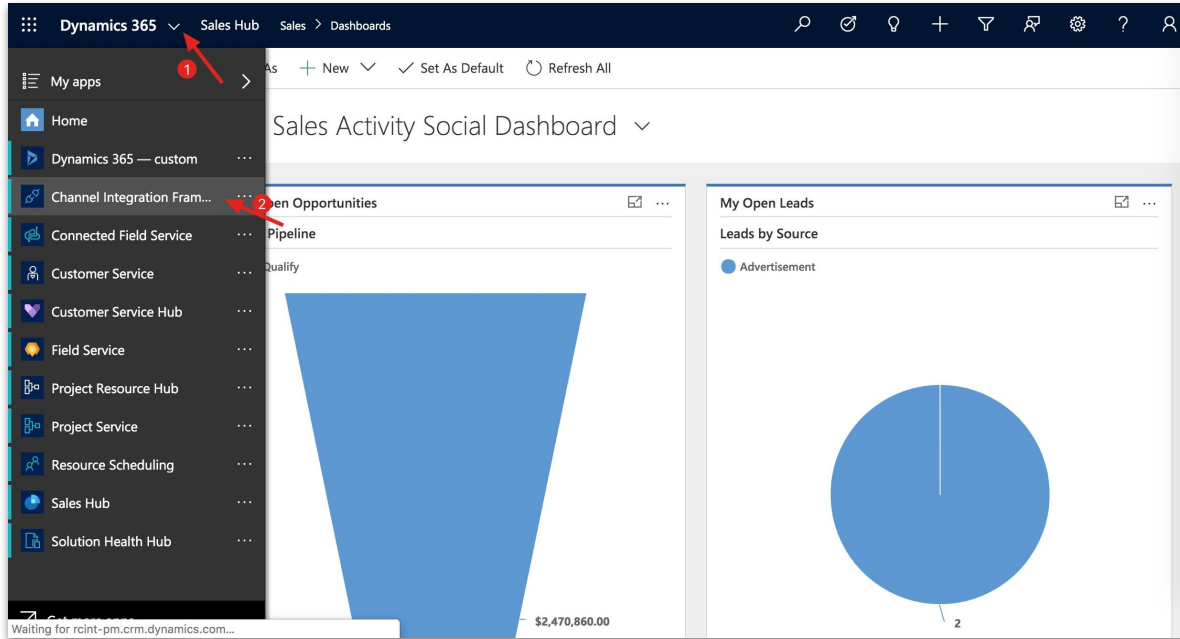
Name ↑	Status	Publisher
Dynamics 365 Customer Voice	Update available	Microsoft Dynamics 365
Environment variables	Installed	Microsoft Dynamics 365
HCM Talent	Installed	Microsoft Dynamics 365
Microsoft Flow Extensions	Installed	Microsoft Dynamics 365
OData v4 Data Provider	Installed	Microsoft Dynamics 365
Power Apps Actions	Installed	Microsoft Dynamics 365
Power Apps Checker	Installed	Microsoft Dynamics 365
Power Automate Process Mining	Update available	Microsoft Dynamics 365
Power Platform Connection References	Installed	Microsoft Dynamics 365
RingCentral for Dynamics 365	Installed	RingCentral

Feedback

1. Access RingCentral for Dynamics 365 in [AppSource](#). Click the Get it Now button.
2. Select the target organization and click install.
3. the Dynamics 365 apps list page will popup and the installation status will be shown. (need to refresh to load latest status).

Step 3: Enable RingCentral for Dynamics

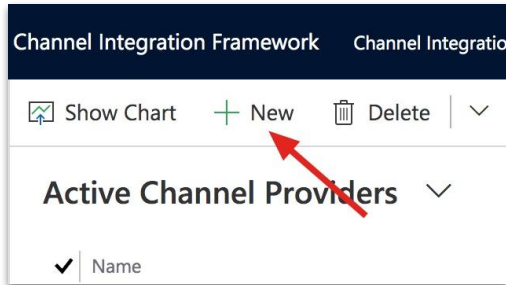
3.1. Go to Channel Integration Framework



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' form. At the top, there's a header with 'New Channel Provider' and 'Channel Provider Configuration'. Below the header, there's a table 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 table, there's a section titled 'Select Unified Interface Apps for the Channel' with a dropdown menu containing the text 'Enter text here'.

Step 3: Enable RingCentral for Dynamics

3.3. Tips for the form 1/2

The screenshot shows the 'New Channel Provider' configuration form. The left sidebar has a 'Channel Providers' section. The main form area is titled 'New Channel Provider' and 'Channel Provider Configuration'. The form contains the following fields and sections:

- 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:** A section with a list of apps: Connected Field Service, Customer Service Hub, Field Service, Project Resource Hub, Project Service, and Resource Scheduling. There is a '2 more' link and a search bar.
- Select the Roles for the Channel:** A section with a search bar.

The bottom of the form shows 'Active' and 'unsaved changes' with a 'Save' button.

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. Please ensure **Channel Access** is included.


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#`

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#`

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

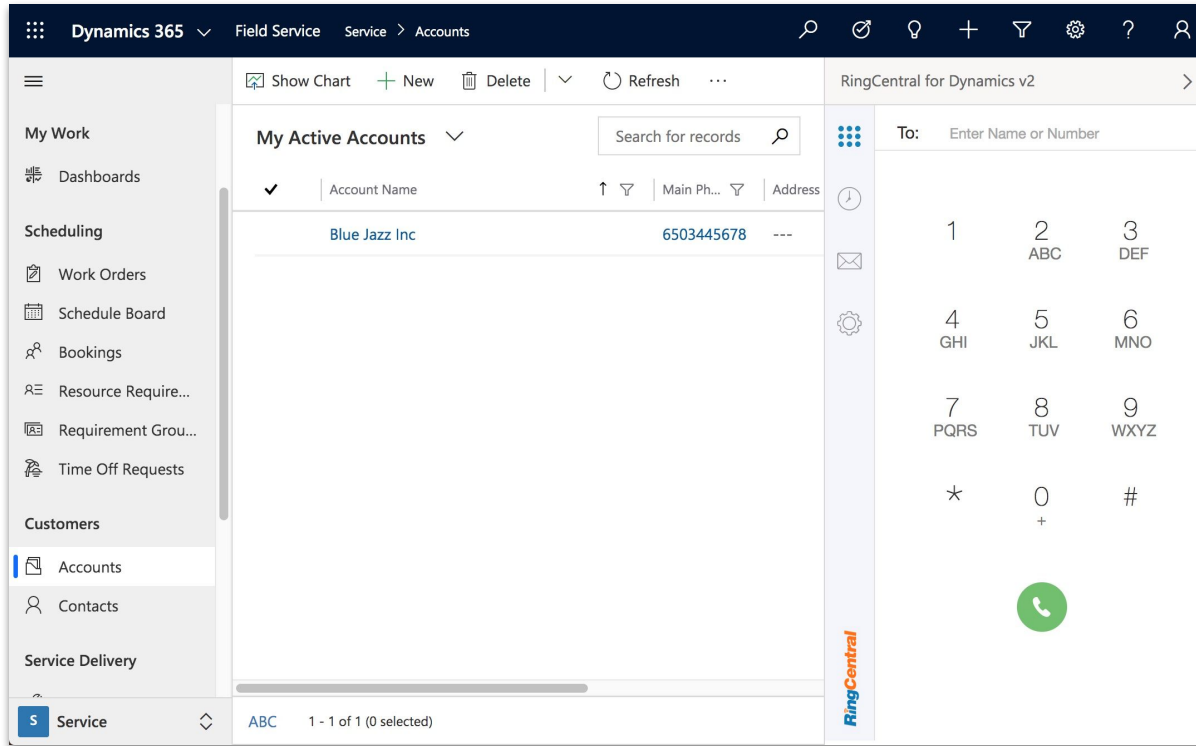
The screenshot shows the Dynamics 365 interface for managing Channel Providers. The top navigation bar includes 'Dynamics 365', 'Channel Integration Framework', and 'Channel Providers'. The left sidebar shows navigation options like 'Home', 'Recent', 'Pinned', and 'Channel Providers'. The main content area displays the 'Active Channel Providers' list. A red arrow labeled '1' points to the 'RingCentral' entry in the list. Another red arrow labeled '2' points to the 'Activate' button in the top toolbar. The 'RingCentral' entry is highlighted in blue, and the 'Activate' button is also highlighted in blue.

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

If the CIF does not show up in Apps, 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.

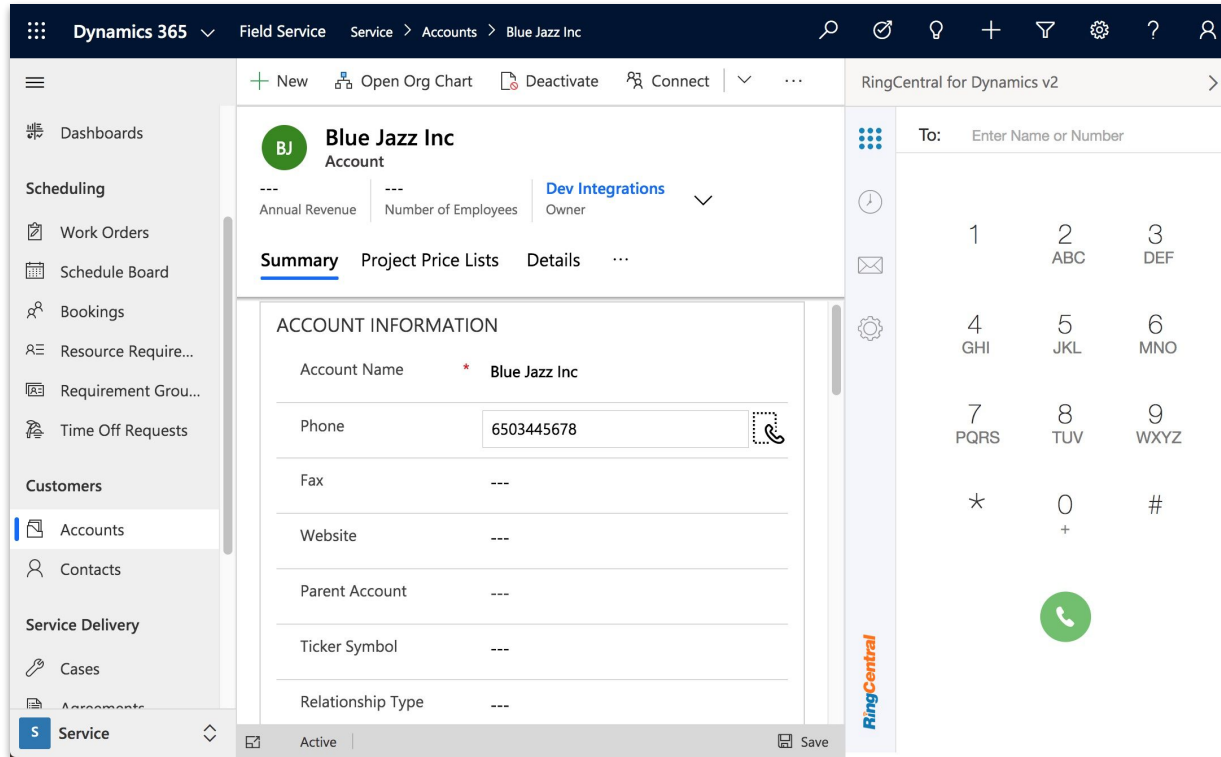
To learn how to use the app, please refer to the User Guide.

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 displays the Microsoft Dynamics 365 interface for the 'Blue Jazz Inc' account. The left sidebar shows navigation options like 'Dashboards', 'Scheduling', 'Customers', and 'Service Delivery'. The main content area shows the 'ACCOUNT INFORMATION' section with fields for 'Account Name', 'Phone', 'Fax', 'Website', 'Parent Account', 'Ticker Symbol', and 'Relationship Type'. The 'Phone' field is highlighted with a 'Click to Dial' icon. The RingCentral interface is visible on the right side of the screen, showing a 'To:' field and a numeric keypad.

ACCOUNT INFORMATION	
Account Name	Blue Jazz Inc
Phone	6503445678
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---
Relationship Type	---

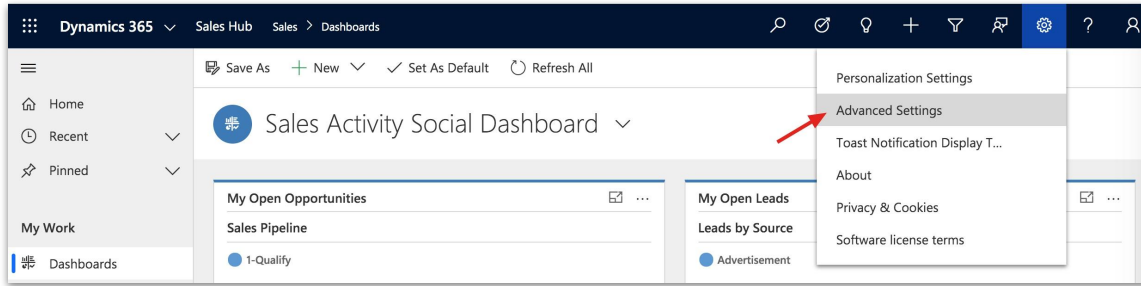
Click to Dial from Phone fields in targeted pages is now available by CIF.

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

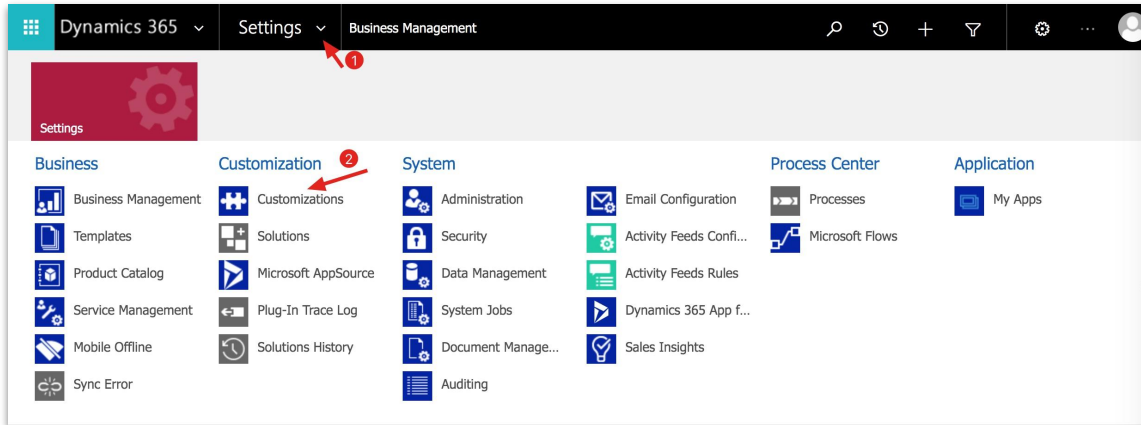
Note: it must be a phone field. and it must be configured in advance.

Step 4: Enable Click to Dial with RingCentral

Step 4.1. Go to Customizations

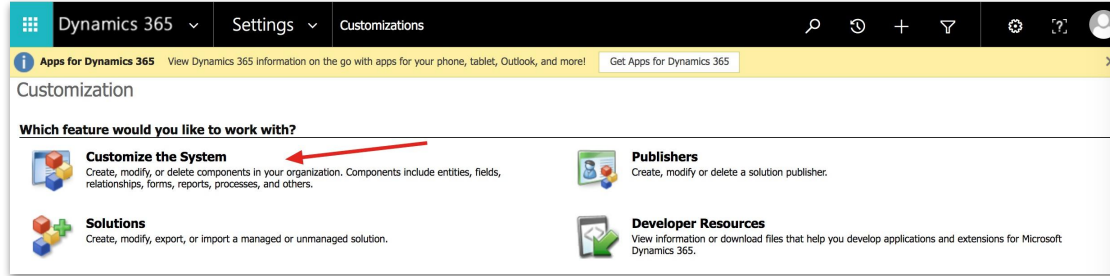


1. Click “Setting” gear icon, select “Advanced Settings” from the list.
2. Click the drop down icon next to “Settings”, and click “Customizations” item.

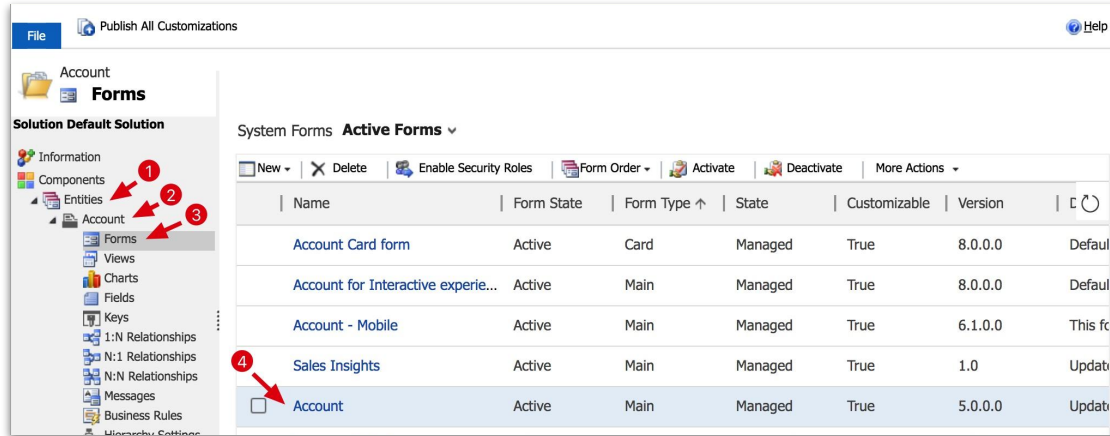


Step 4: Enable Click to Dial with RingCentral

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.

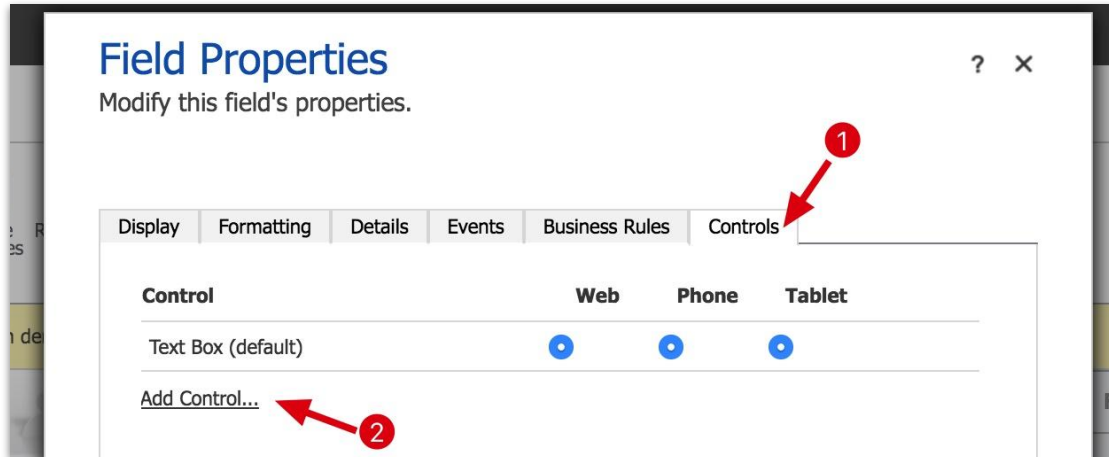
If you want to enable Click 2 Dial in multiple pages of this entity, you will need to customize them all.

Step 4: Enable Click to Dial with RingCentral

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



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."



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"/>	✕

[Add Control...](#)

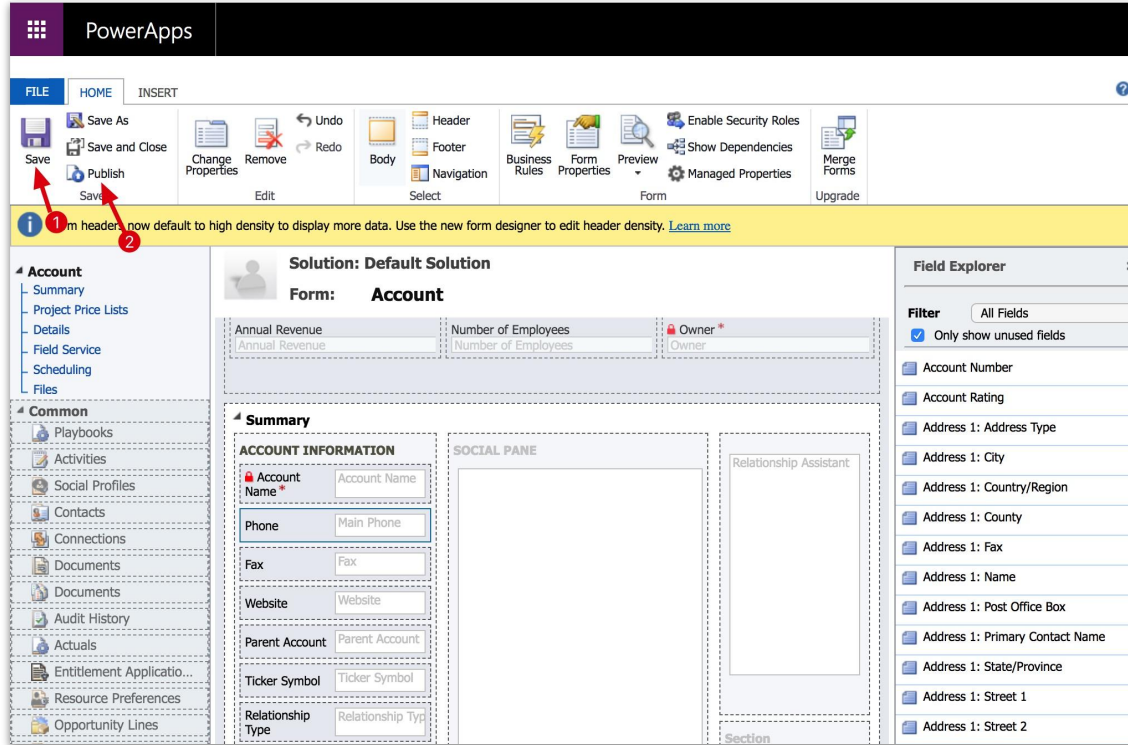
Channel Communication Control

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



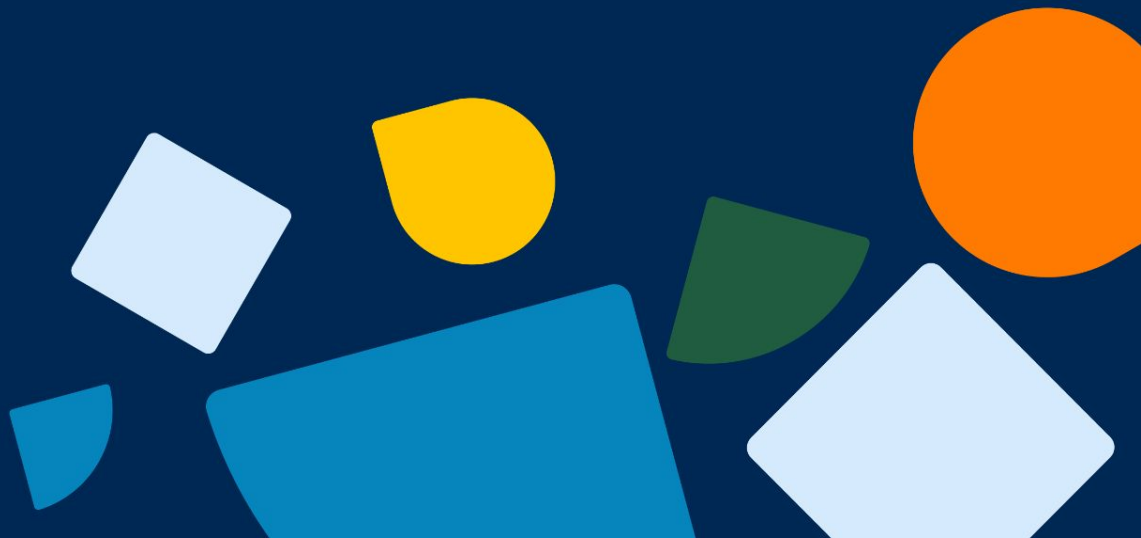
1. Return to main page, click “Save” and then “Publish.”
2. Go the Account page, you will find the call button turn from



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 with Package
Install from New



Install from AppSource Steps

1

Install CIF from
AppSource

2

Install RingCentral
for Dynamics from
AppSource

3

Configure CIF to
enable RingCentral

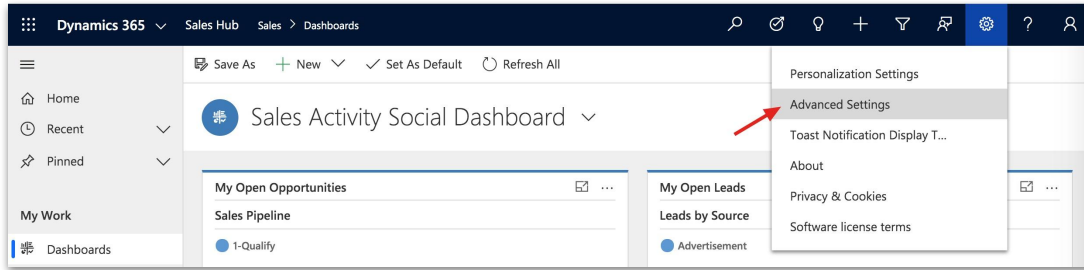
4

Configure Click to
Dial in Dynamics

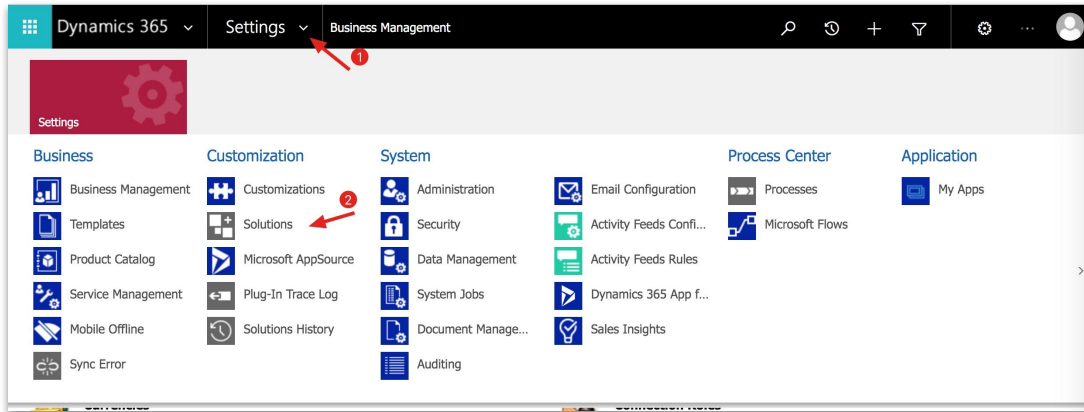
The only difference between install with package and from AppSource, is that in Step 2, administrator needs to import the app from the package manually.

Import RC for Dynamics

1. Go to Dynamics Solutions view

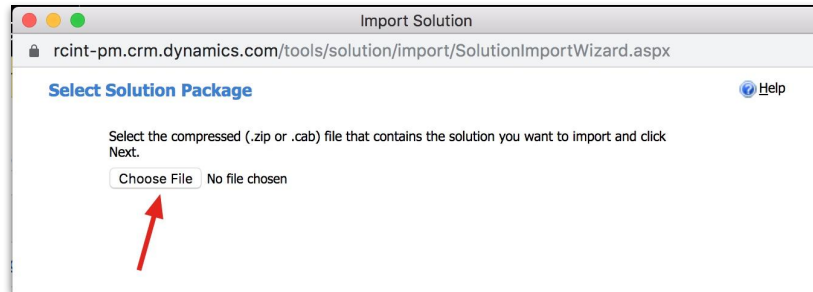
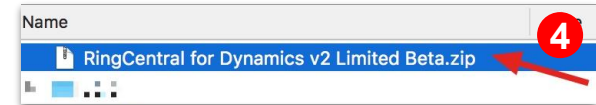
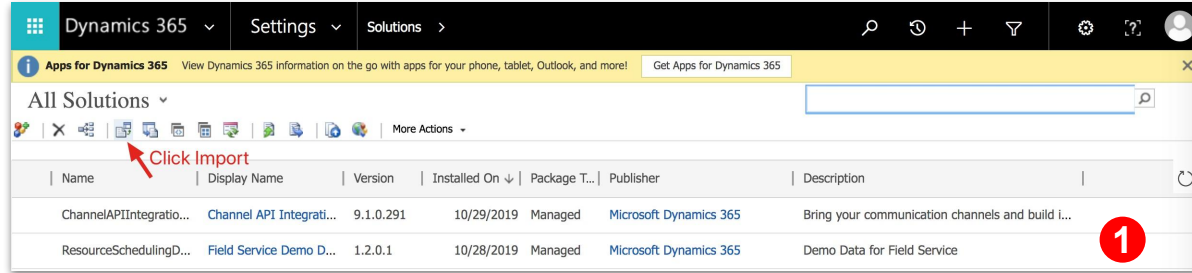


1. Click “Setting” -> “Advanced Settings.”
2. Advance Settings tab will be opened. Click the dropdown icon in “Settings”, and click “Solutions.”



Import RC for Dynamics

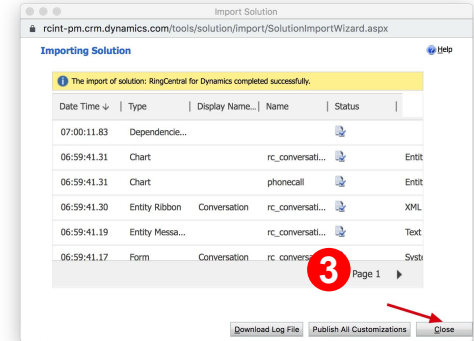
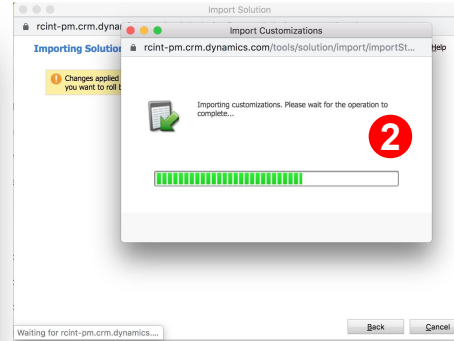
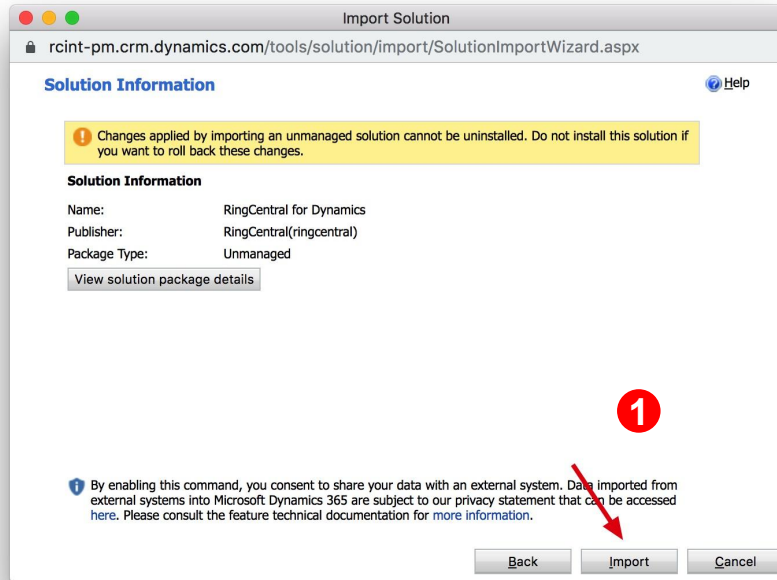
2. Import the RingCentral Solution package 1/2



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.”

Import RC for Dynamics

3. Import the RingCentral Solution package 2/2



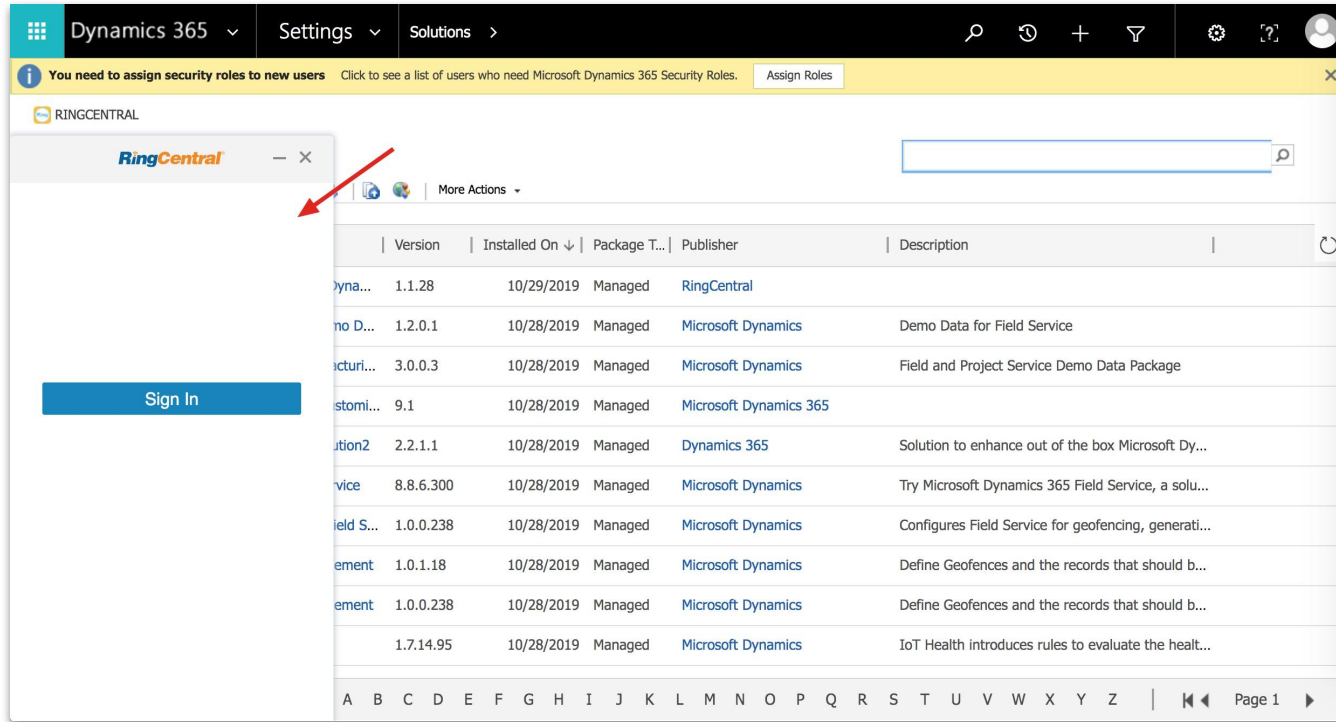
1. Click "Import" button to start importing RingCentral solutions package.
2. The time needed for importing depends on network and server performance
3. Once import is complete, click "Close" button to finish the process.

Install with Package
Install from v1.x



Overview of RingCentral for Dynamics v1.x

How it looks



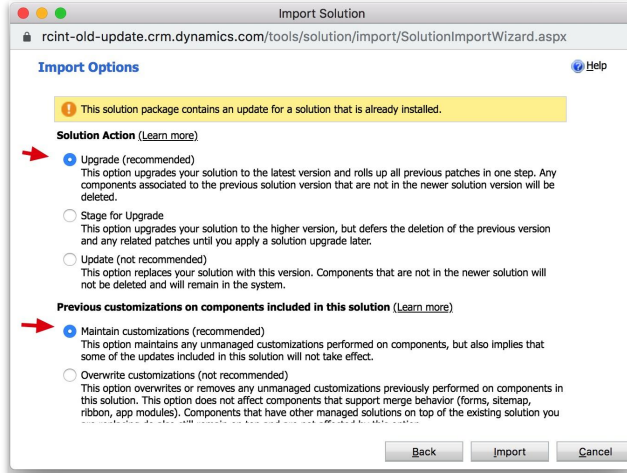
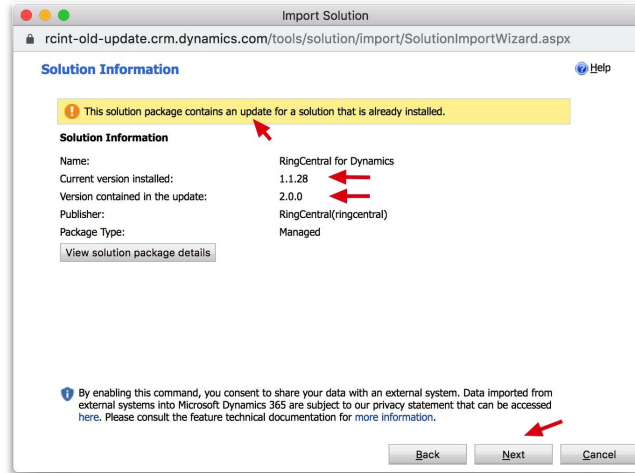
The screenshot shows the Microsoft Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this, a yellow banner states 'You need to assign security roles to new users'. The left sidebar contains the 'RingCentral' app icon, which is highlighted by a red arrow. 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
ustomi...	9.1	10/28/2019	Managed	Microsoft Dynamics 365	
tion2	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...
ield 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.

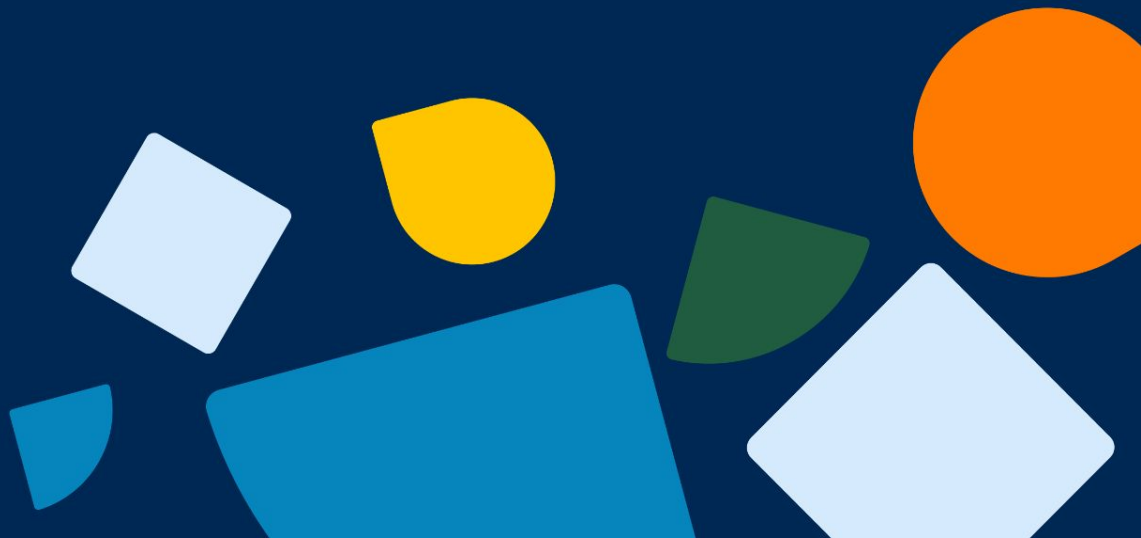
Installing from Old

The difference

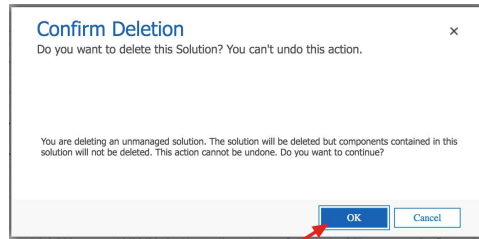
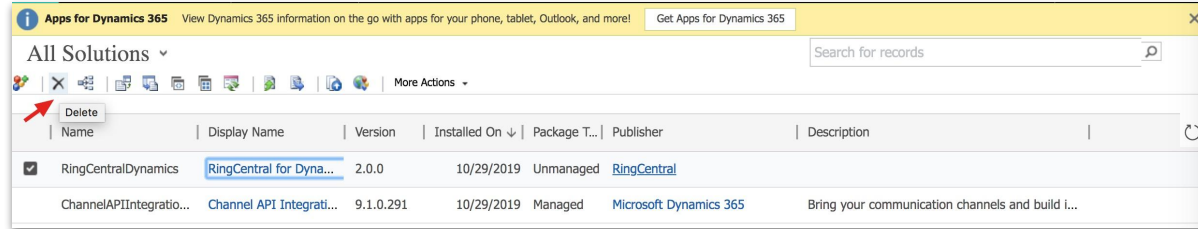


1. Follow the same steps as installing from new detailed in Step 1.
2. When you reach Step 2.2, you will see different popup info illustrated here.
3. Confirm and click Next and Import.
4. Remaining steps are the same as install from new scenario.

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 Channel Providers. The left sidebar contains navigation options: Home, Recent, Pinned, Channel Provider Configuration, and Channel Providers. The main area displays 'Active Channel Providers' with a table of records. The 'Delete' button in the top toolbar is highlighted with a red circle and the number 2. A red circle with the number 1 highlights the 'RingCentral' record in the table. A 'Confirm Deletion' dialog box is open in the foreground, asking for confirmation to delete the selected record.

Dynamics 365 Channel Integration Framework Channel Providers

Show Chart Edit Activate Deactivate Delete

Active Channel Providers

Search for records

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

Confirm Deletion

Do you want to delete this Channel Provider? You can't undo this action.

Delete Cancel

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

Thank you.

