RingCentral for Dynamics V2 Admin Guide

Content

Install from AppSource

Install form AppSource Steps

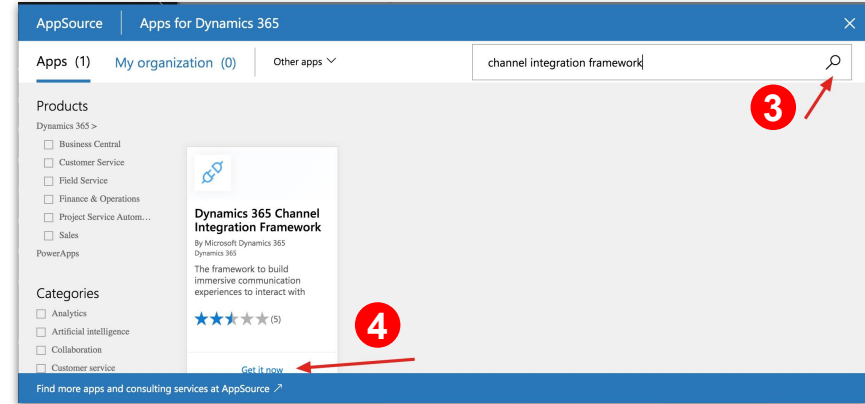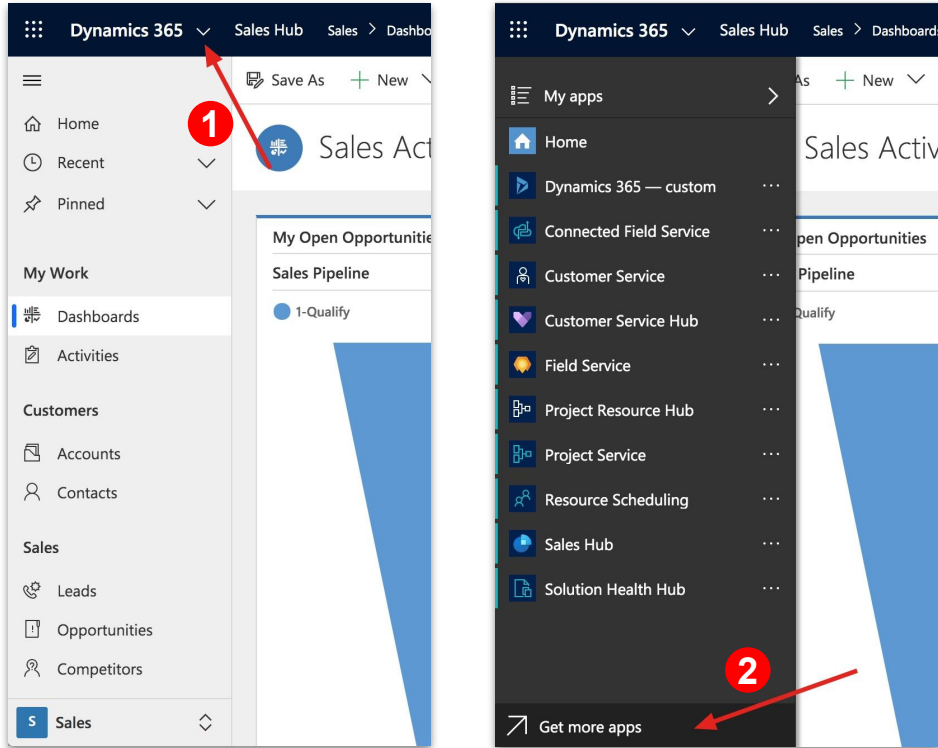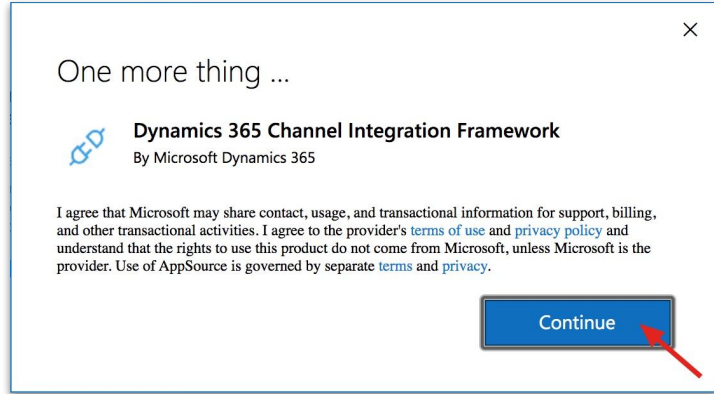|			
1	**2**	**3**	**4**
Install CIF from AppSource	Install RingCentral for Dynamics from AppSource	Configure CIF to enable RingCentral	Configure Click to Dial in Dynamics

Step 1: Install CIF
1.1 Search in AppSource

1 & 2 Open AppSource

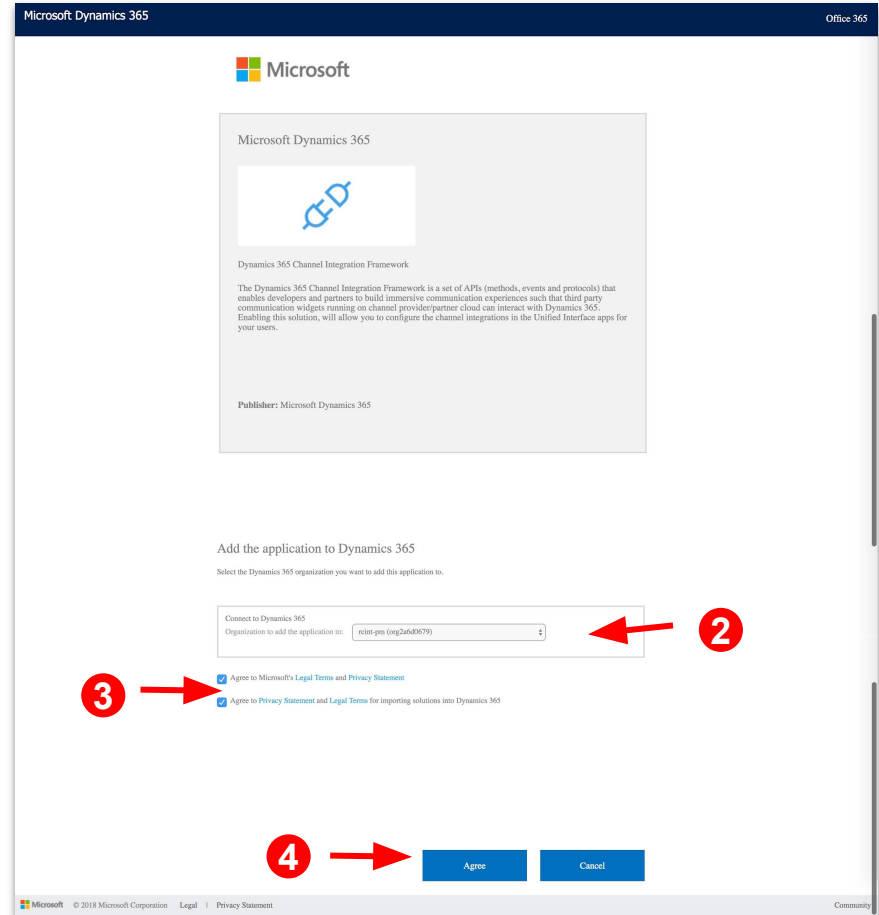3 Search "channel integration framework"

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

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

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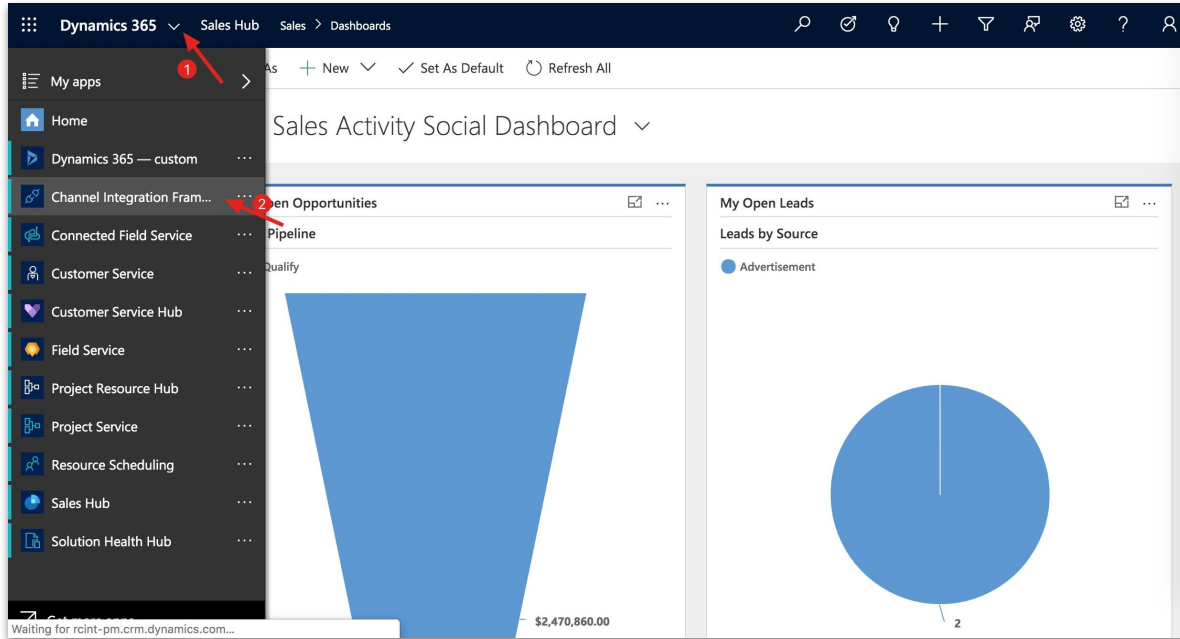
1. Refresh your main window, click the dropdown icon next to Dynamics 365, you should see "Channel Integration Framework" listed as an App.
2. Click it to go to CIF view.

Step 3: Enable RingCentral for Dynamics
3.2. Add active channel provider

Channel Integration Framework Channel Integratio

☑ Show Chart + New 🗑 Delete ⌄

Active Channel Providers ⌄

✓ | Name

💾 Save ⮺ Save & Close + New ⎘ Flow ⌄

New Channel Provider

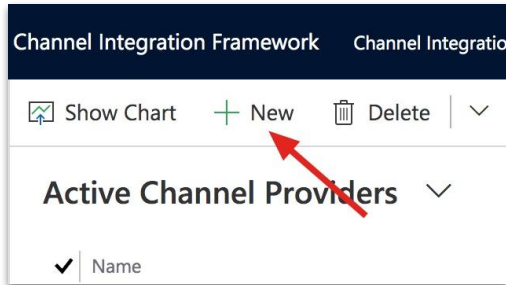**Channel Provider Configuration**

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

Select Unified Interface Apps for the Channel

Enter text here ⌄

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.

Step 3: Enable RingCentral for Dynamics
3.3. Tips for the form 1/2

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

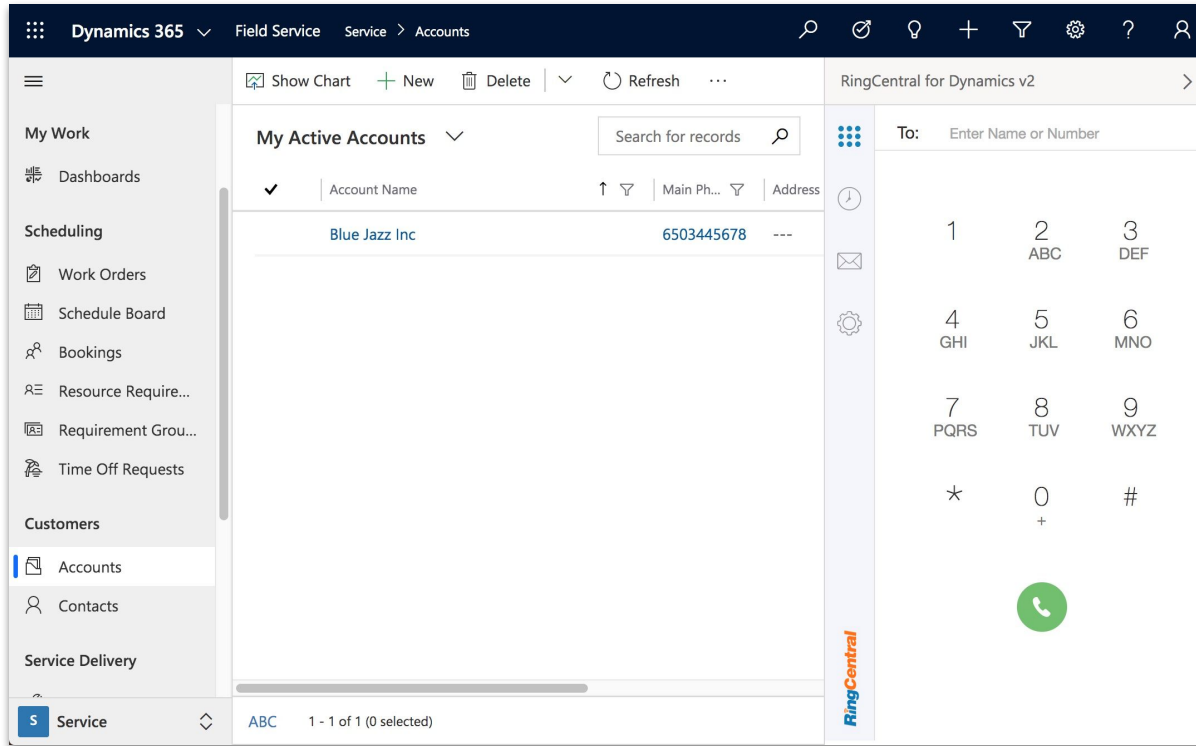# Step 3: Enable RingCentral for Dynamics
3.4. Activate the App

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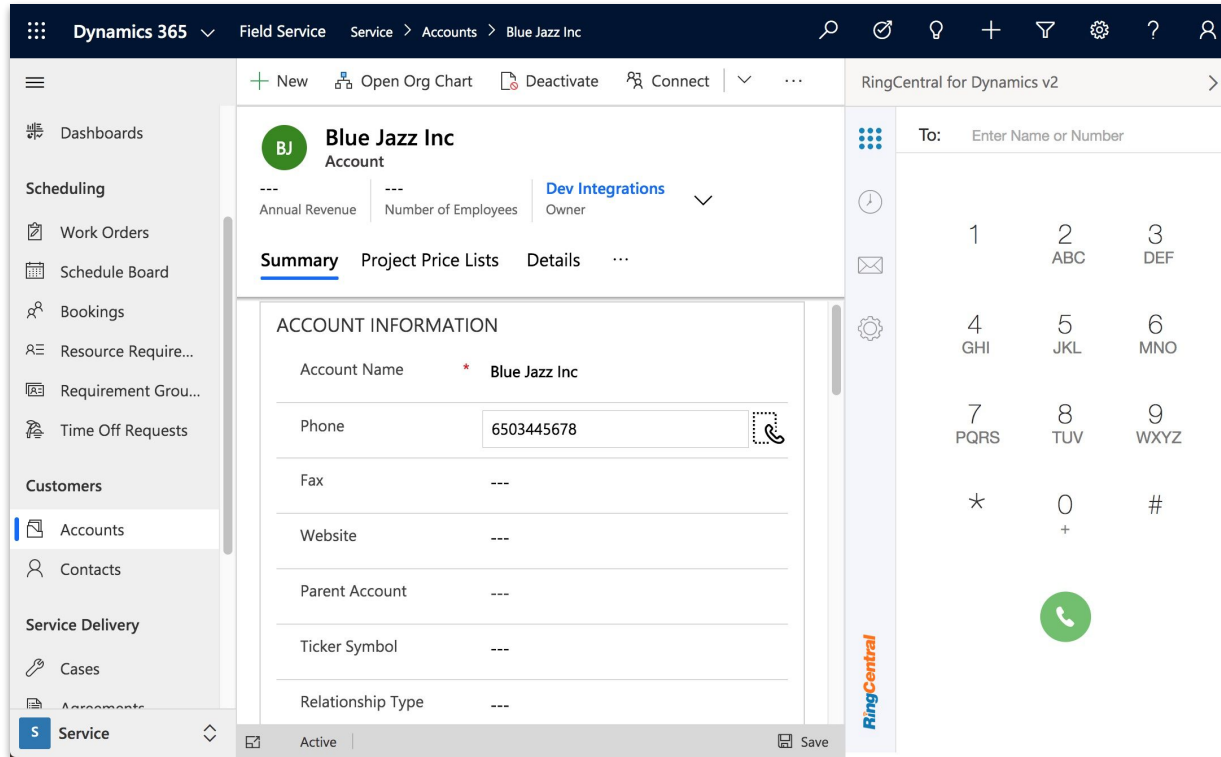
To learn how to use the app, please refer to the User Guide.

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.

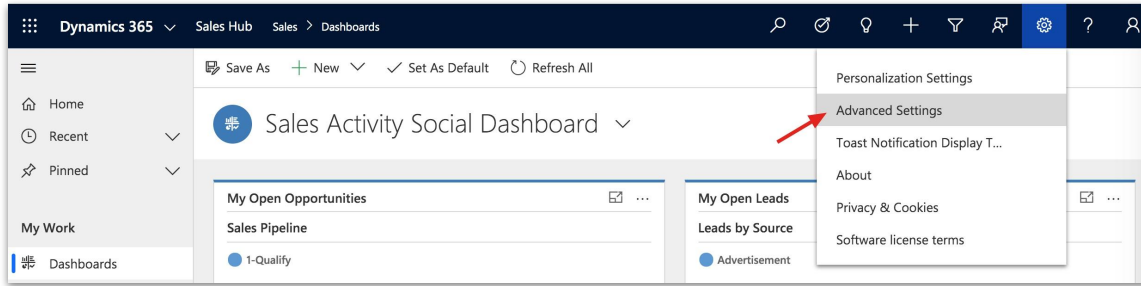# Step 4: Enable Click to Dial with RingCentral Description

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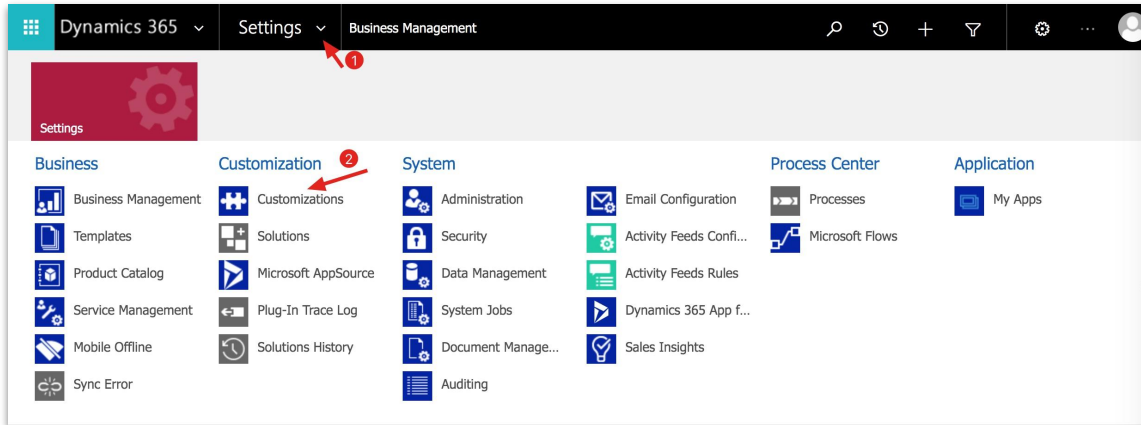
Note: it must be a phone field. and it must be configured in advance.

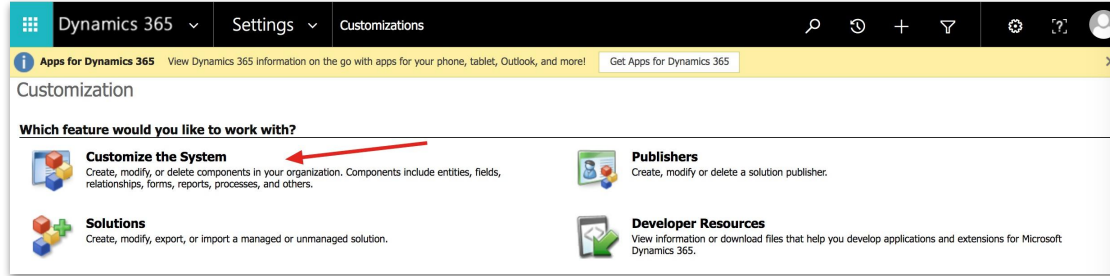# Step 4: Enable Click to Dial with RingCentral
Step 4.1. Go to Customizations

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.
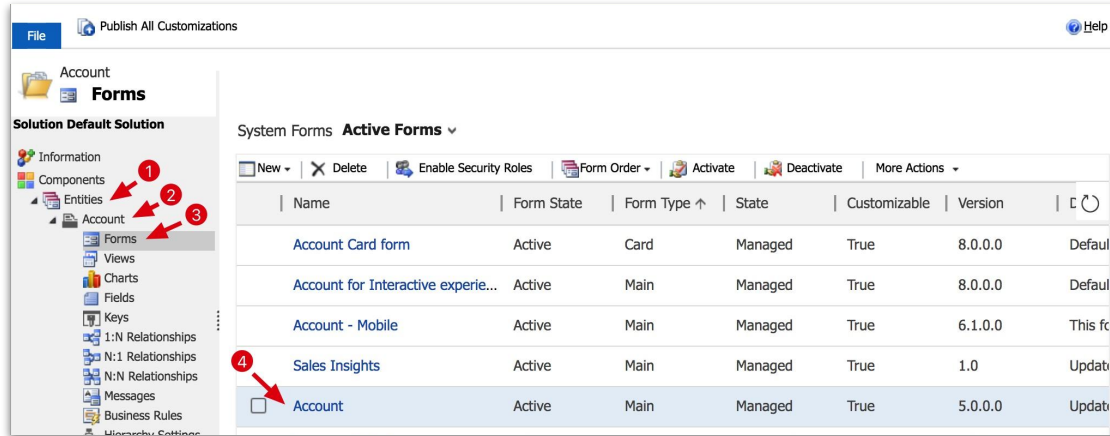
Note: *A form can be considered a page in Dynamics. Let's take Account for example. You might have many ways to view the account data: the account page, the account card, etc. In this page Dynamics lists all the views.*
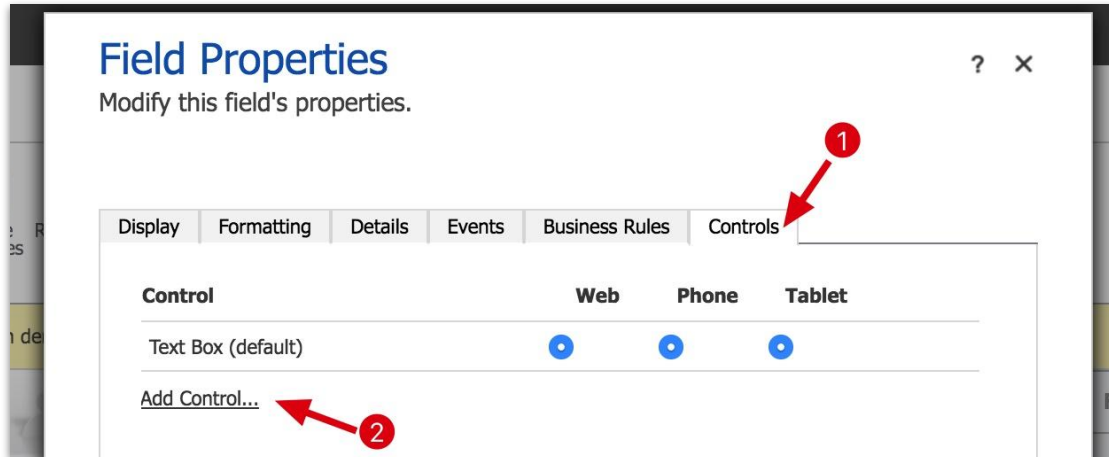
If you want to enable Click 2 Dial in multiple pages of this entity, you will need to customize them all.

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

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
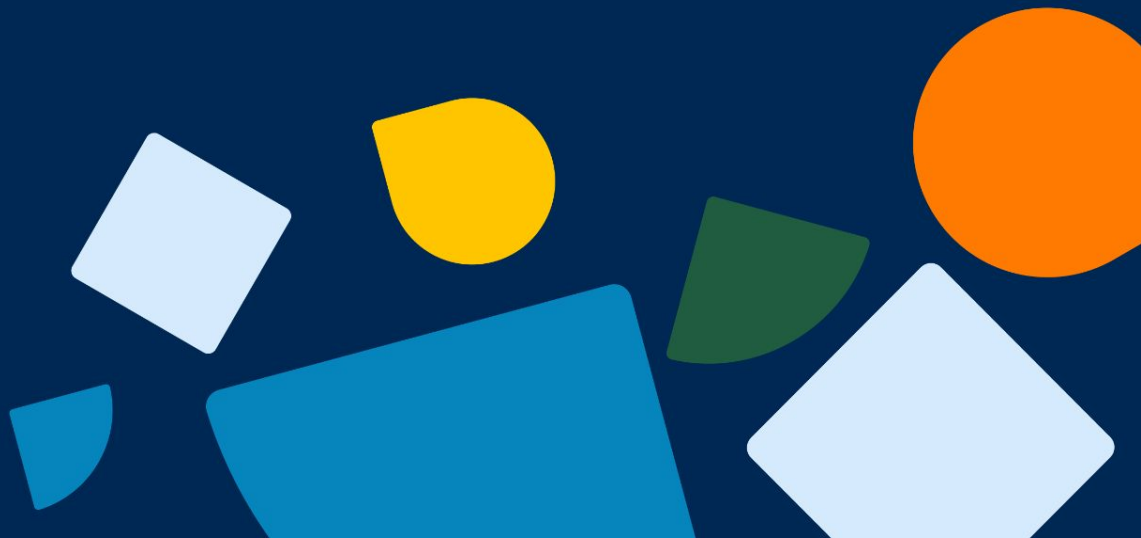# Step 4.4. Save and publish
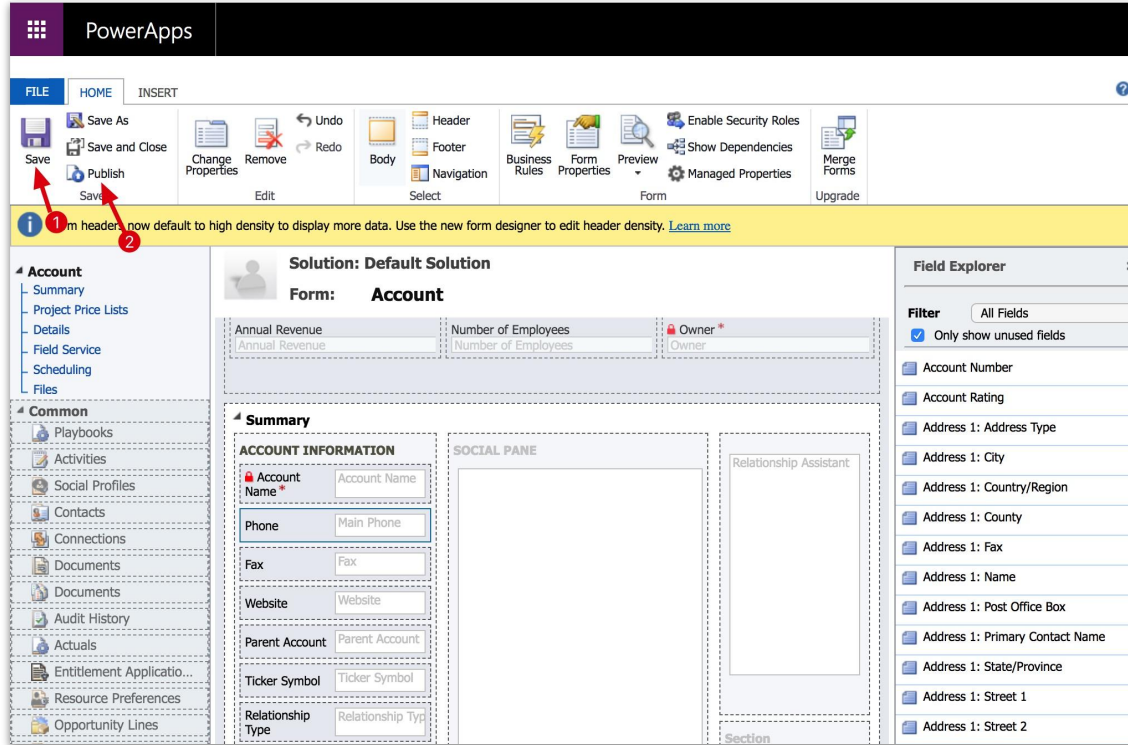
1. Return to main page, click "Save" and then "Publish."
2. Go the Account page, you will find the call button turn from

To

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 form AppSource
Steps

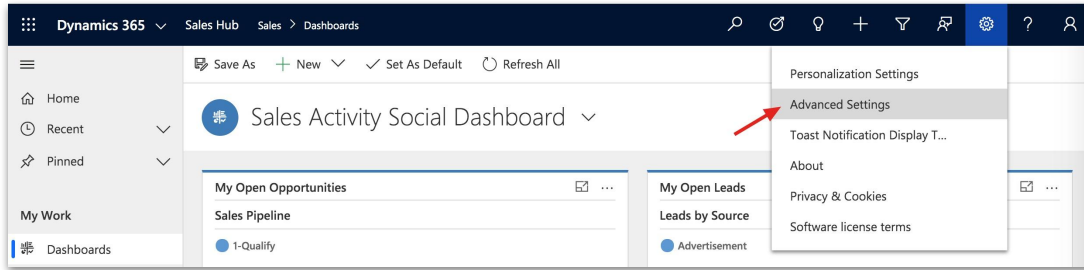| 1	2	3	4
Install CIF from AppSource	Install RingCentral for Dynamics from AppSource	Configure CIF to enable RingCentral	Configure Click to Dial in Dynamics

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.
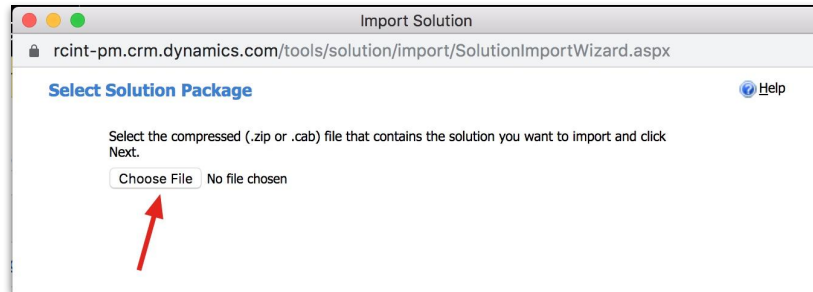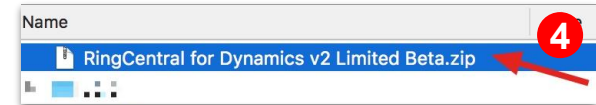
Import RC for Dynamics
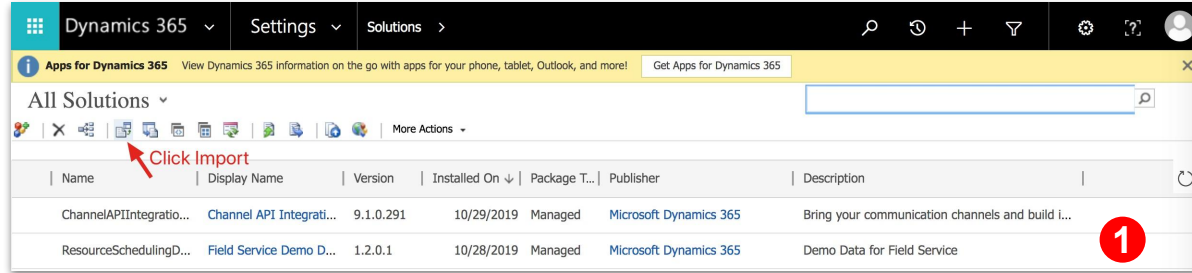# 1. Go to Dynamics Solutions view

1. Click "Setting" -> "Advanced Settings."
2. Advance Settings tab will be opened. Click the dropdown icon in "Settings", and click "Solutions."
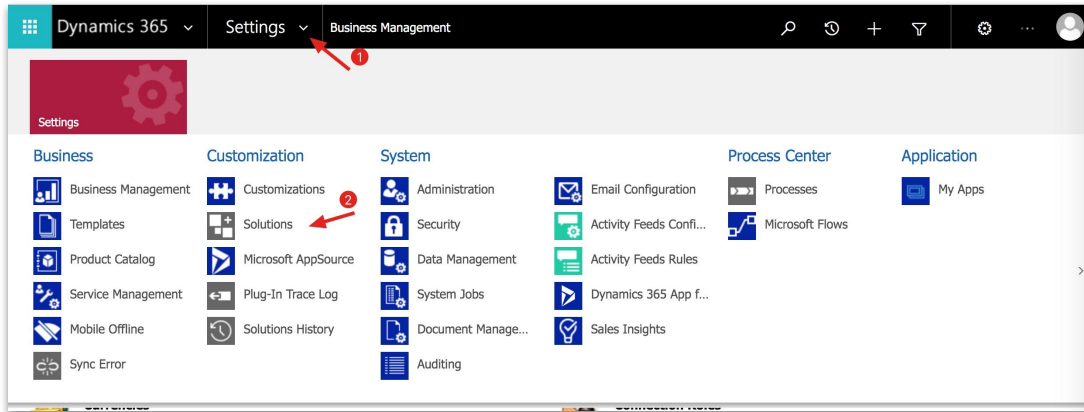
# Import RC for Dynamics
2. Import the RingCentral Solution package 1/2

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."

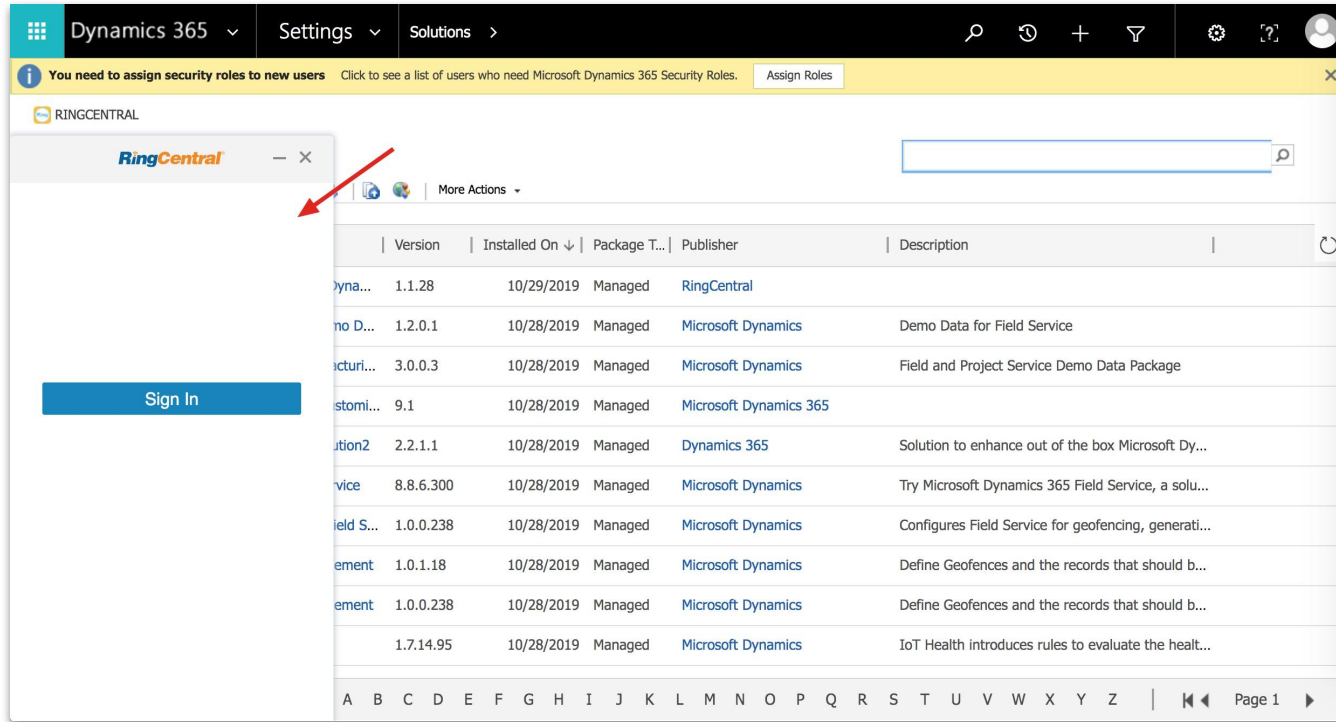# Import RC for Dynamics
3. Import the RingCentral Solution package 2/2
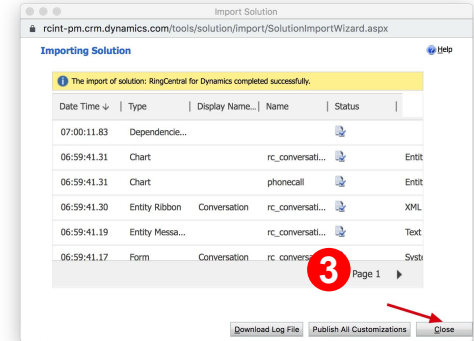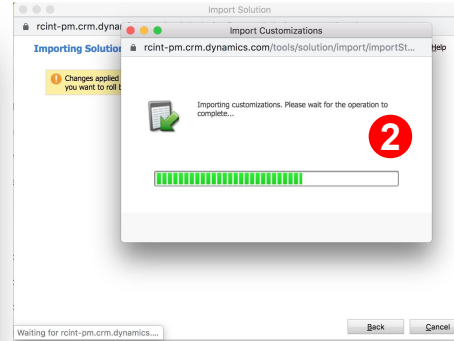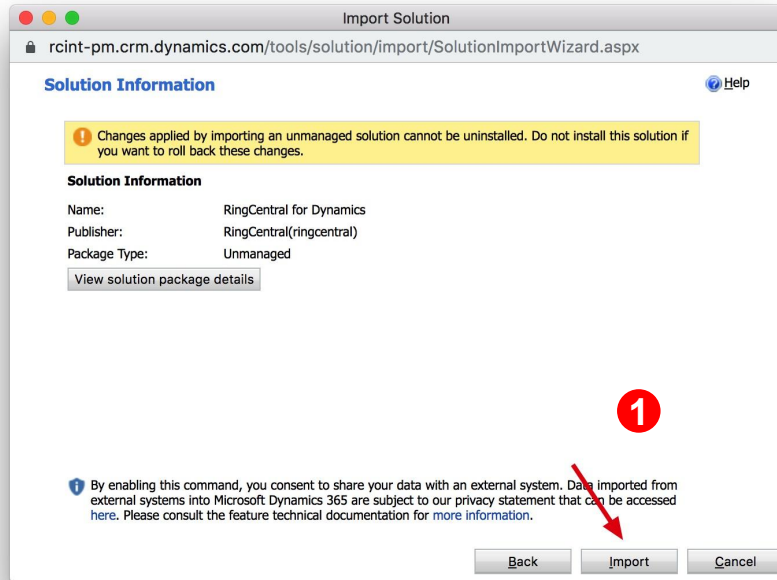
1. Click "Import" button to start importing RingCentral solutions package.
2. The time needed for importing depends on network and server performance
3. Once import is complete, click "Close" button to finish the process.

Install with Package Install from v1.x

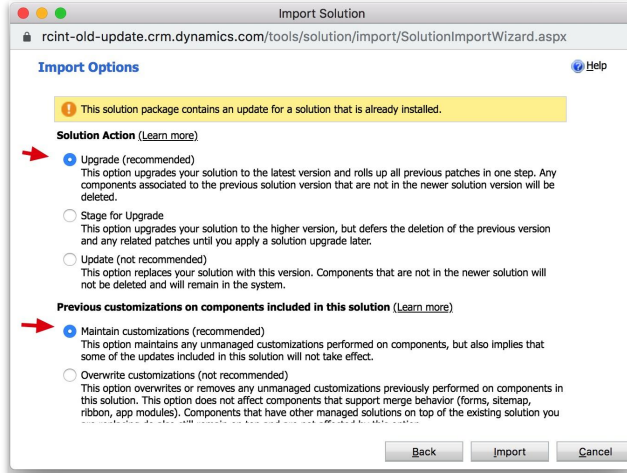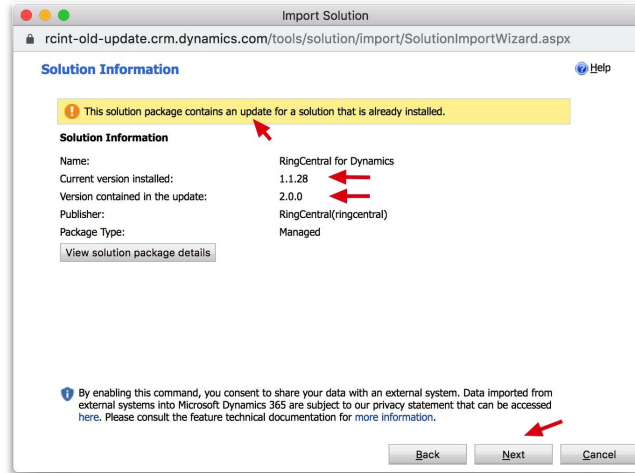# Overview of RingCentral for Dynamics v1.x
How it looks

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.
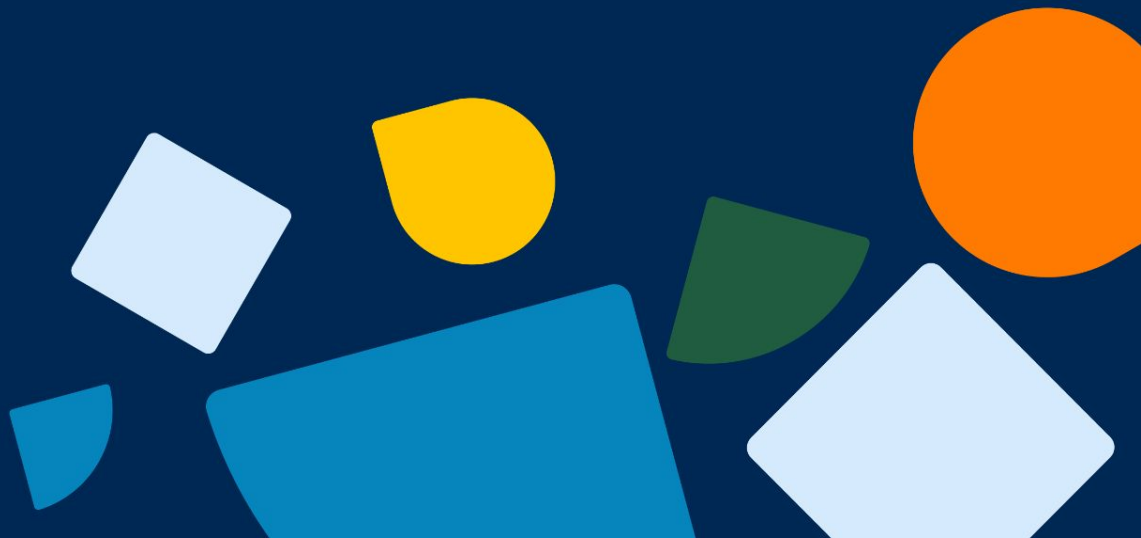2. RingCentral for Dynamics v1.x can be upgraded to v2.x without uninstalling.
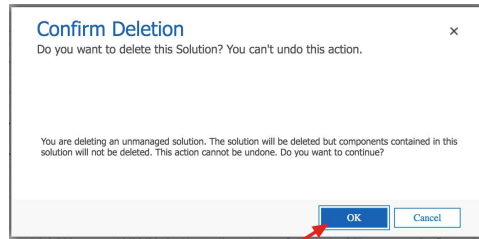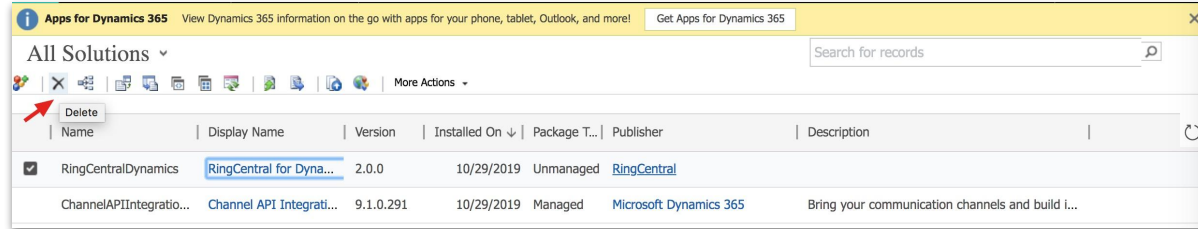
Installing from Old
The difference

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

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

RingCentral

Thank you.