

RingCentral for Microsoft Dynamics 365

User Guide

For v2.0 and Later

CONTENT

Introduction	2	Auto Log	16
About RingCentral for Microsoft Dynamics 365 v2	2	Show Matched Entities in Dynamics	17
Requirements	2	Record Matching Setting	17
Key Features	2	Call History	18
About this Guide	2	Message and SMS	20
Before Getting Started	3	Sent and Receive SMS	21
Preparation	3	Compose and Send SMS	21
Reference Resource	3	Access to SMS	22
How it looks once RingCentral for Dynamics 365 has been enabled:	3	Log SMS	22
Important Notice	4	Manually log SMS	23
Login	5	Auto log SMS	23
Overview	6	Log SMS content	23
Main Pages	6	Voicemail	24
Core Flow - Log Active Calls	7	Fax	24
Settings Overview	8	FAQ	25
Dialer and Call	10		
Before Calling	10		
Ways to Place a Call within Dynamics	11		
Call Logs	12		
The Mapping of Call Logs to Phone Call activity	12		
Call Log	13		
Call Notification When Taking Notes	14		
Swiftling from Active Calls	15		
Entries to Call Log	15		
Logging: Manual and Auto	16		
Manually Log	16		

Introduction

About RingCentral for Microsoft Dynamics 365 v2

RingCentral for Microsoft Dynamics 365 v2 provides seamless integration between Dynamics 365 and your RingCentral services to enable improved customer retention, greater agent productivity, and advanced business processes.

RingCentral for Microsoft Dynamics 365 v2 was built on the [Channel Integration Framework](#) (CIF v1.0) on Microsoft Dynamics 365, so it provides seamless interaction between Dynamics and RingCentral.

Requirements

Software

- RingCentral for Dynamics
- RingCentral Desktop phone
- Browser
 - Google Chrome (Recommended, version 69 or later)
 - Or Microsoft Edge

Permission

- To install RingCentral for Dynamics, the Dynamics admin's permission is required.
- To use RingCentral for Dynamics, RingCentral Office editions Premium and above is required.

Key Features

- Make calls
- Send SMS
- View call history
- Active Call controls
- Enhanced call handling
- Create call logs (new)
- Get multiple call matches
- Access business texts, fax, and voicemails in one view.
- SMS content logging (new)
- Customizable settings

About this Guide

This guide is specifically designed for end-users of RingCentral for Dynamics v2.0 and later versions. This guide is not intended for system/network administrators and does not provide any information on how to set up the application on user desktops or how to configure the Dynamics instance to be able to use this application. This user guide will show you how to use this application and provide known issues/limitations of the application as well as some basic troubleshooting questions and answers.

Before Getting Started

Preparation

For an optimal user experience, ensure that:

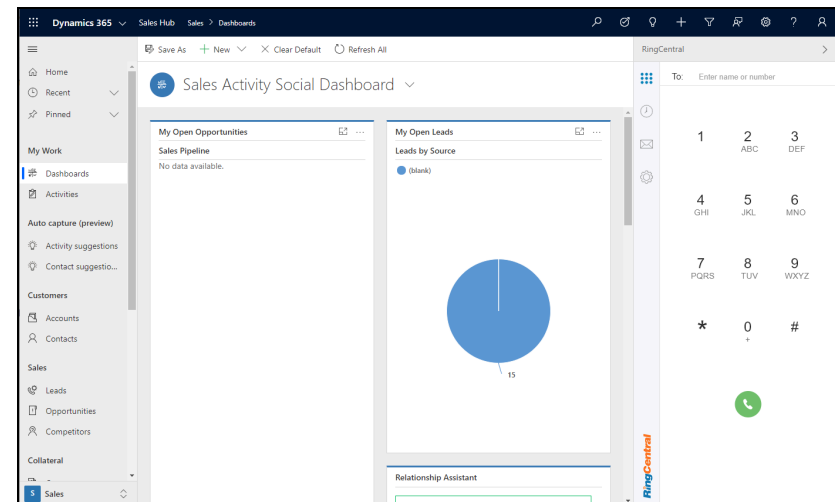
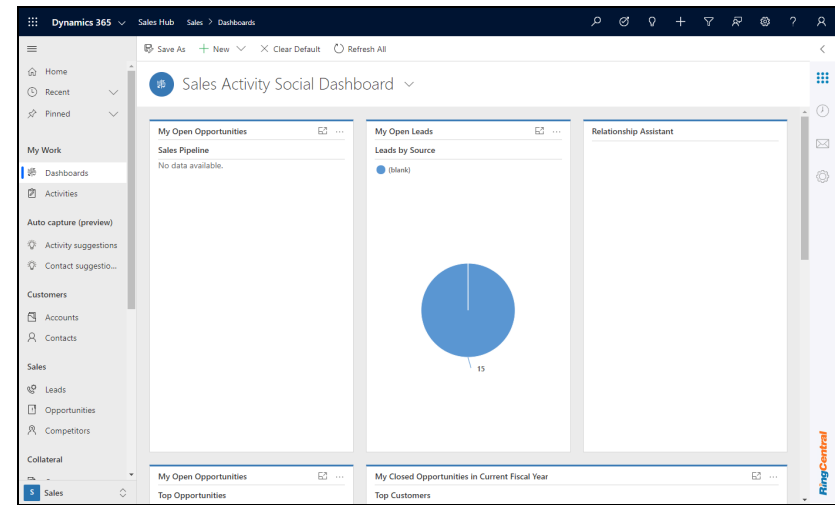
1. The browser you are using is updated to the latest version.
2. RingCentral for Dynamics 365 is successfully installed and configured¹.
3. Login to Dynamics 365 through the browser; the App will work only when the user is logged in to Dynamics 365.
4. Login to RingCentral for Dynamics through Dynamics 365.
5. Your browser must have its pop-up blocker disabled for the Dynamics 365 site.
6. RingCentral Desktop is installed.
7. Login to RingCentral Desktop app with the same account as your RingCentral for Dynamics 365 account.

Reference Resource

- Admin Guide for installation and configuration
- RingCentral for Dynamics [Community](#)
- RingCentral for Dynamics in [RingCentral App Gallery](#)
- RingCentral Phone Desktop in RingCentral [App Gallery](#)
- [Helpdesk](#)

¹ Install and configure as described in the admin guide.

How it looks once RingCentral for Dynamics 365 has been enabled:

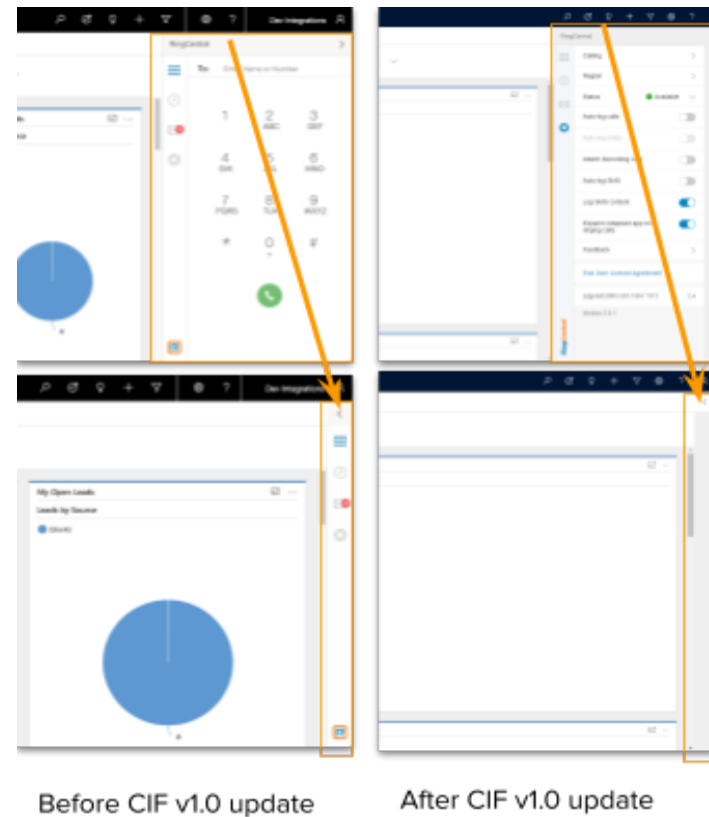


Important Notice

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:

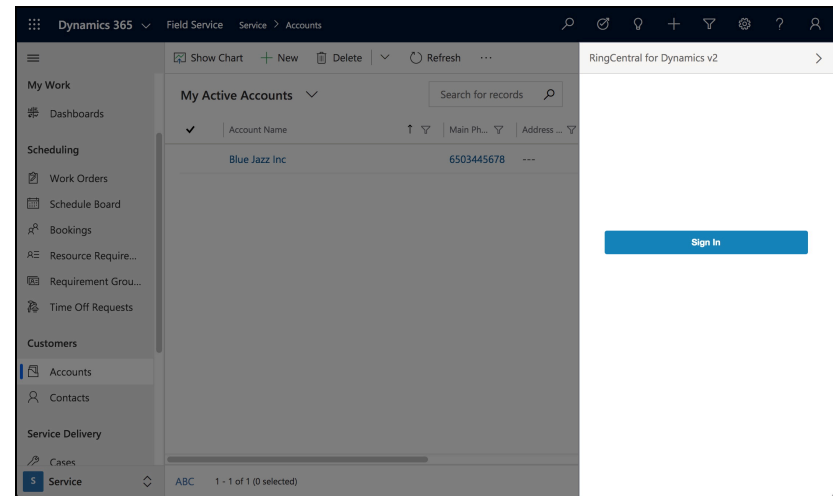
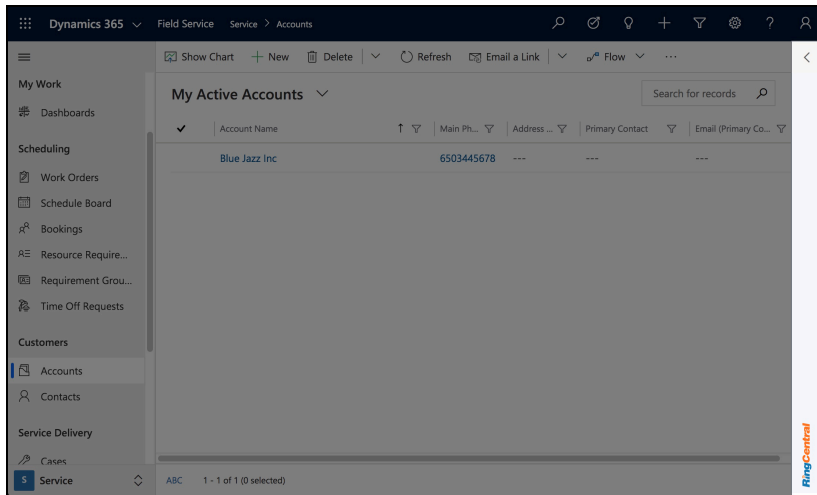
- An extra sidebar shows in the app
- When RC app folded, the native sidebar covers the navigation bar. Please click on the **arrow** on the top to expand the RC application.

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



Login

When your RingCentral for Dynamics 365 is successfully installed and configured, it will appear as a sidebar on the right-hand side of any enabled Unified Interface apps².



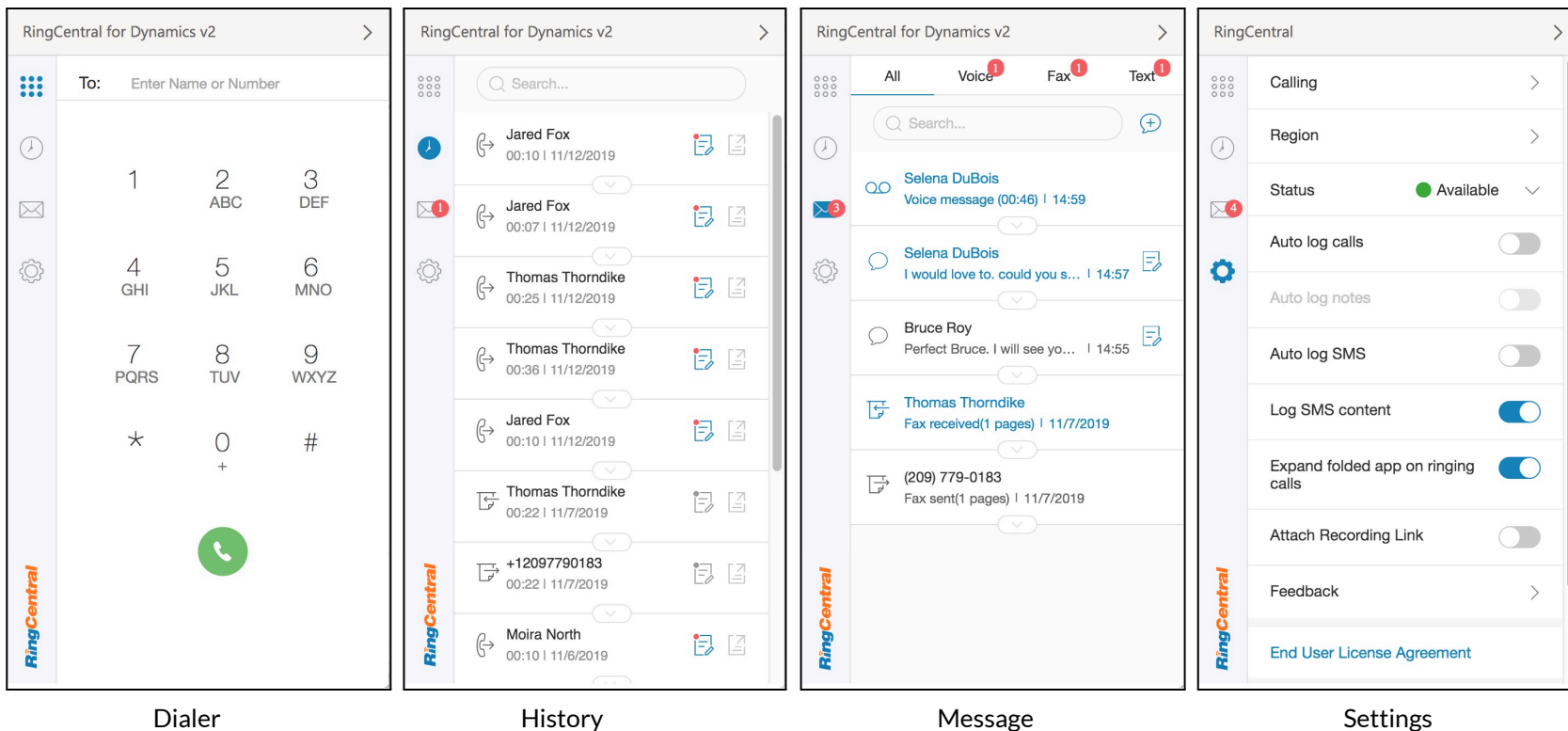
Clicking any part of the sidebar shows the **Sign In** button. Use your RingCentral account to log in.
 Note that the Sign In page appears in a popup window, so confirm that your permission settings allow popups to display..

² Install and configure as described in the Admin Guide.

Overview

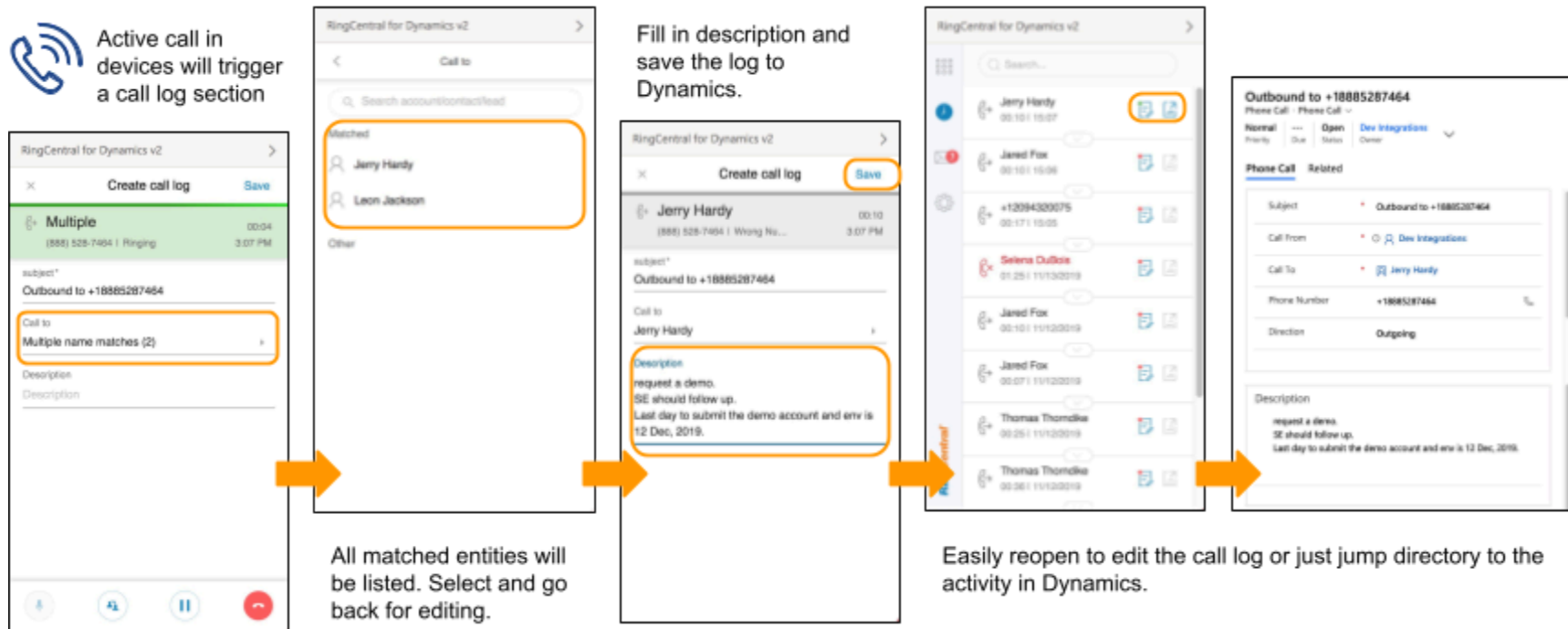
Main Pages

Logging in provides access to **Dialer**, **History**, **Message**, and **Settings**.



Core Flow - Log Active Calls

1. When receiving a call, the Call Log section pops up on all devices logged in to same RingCentral for Dynamics account.
2. If the phone number of the active call matches any **Contacts**, **Leads**, or **Accounts** in Dynamics, you will be able to select the match and edit the notes.
3. Depending on your settings, the Call Log is saved to Dynamics either automatically or manually as Phone Call Activity.
4. You can update the content or visit the saved activity from RingCentral for Dynamics, or the directory in Dynamics.



Settings Overview

RingCentral for Dynamics provides rich setting options to help users customize the app.

- **Calling** allows users to select calling preferences, including calling from the **RingCentral Phone desktop app**, registered **RingCentral phone**, a **Custom phone**, or in some permission, **Other phone**.
- **Region** denotes the outbound call prefix.
- **Status** allows users to choose **Available**, **Busy**, **Do not Disturb**, and **Invisible**. The status syncs with your other RingCentral apps.
- **Auto log calls**, switch **ON** to auto log basic call information.
- **Auto log notes**, switch **ON** to auto save and update notes in call log.
- **Attach Recording Link**, switch **ON** to auto log recording link if any.
- **Auto log SMS**, switch **ON** to auto save or update any new SMS.
- **Log SMS content**, switch **ON** to log SMS content. If not switched on, only the SMS timestamp is recorded.
- **Expanding the folded app on ringing calls** allows users to decide whether to be informed within Dynamics when there is an incoming call.
- **Show matched entities in Dynamics**, switch **ON** to show matched entities in Dynamics on inbound calls.
- If current account has a call queue number, **Accept call queue** will also be shown in the Settings.
- **E.164 Format Num. Search** (Enables faster search results) -
 - If you enable this setting, ensure that all the contact numbers are stored in E.164 format and the contacts

will be searched using E.164 format during an inbound call.

- If you disable this setting then the contact search will happen using Wildcard approach. It's a slow search but it will find contacts stored in any format.
- By default the setting is turned OFF.

Dynamics 365 | Customer Service Hub | New look

RingCentral

Calling >

Region >

Status Available v

Auto log calls ☐

Auto log notes ☐

Attach Recording Link ☐

Auto log SMS ☐

Log SMS content ☒

Expand folded app on ringing calls ☒

Show matched entities in Dynamics ☐

E.164 Format Num. Search ① ☐

Record matching setting >

What's New >

Feedback >

[Terms of Service](#)

Logout
(323) 763-0022 * 103

Version 2.0.16 (203)

GENERAL INFORMATION

First Name * RCV

Last Name * RCV_ext3

Account Name ---

Mobile Phone (213) 254-2381

Fax ---

Contact Method Any

Address 1: Street 1 ---

Address 1: Street 2 ---

Address 1: Street 3 ---

Address 1: City ---

Address 1: State/Province ---

Address 1: ZIP/Postal Code ---

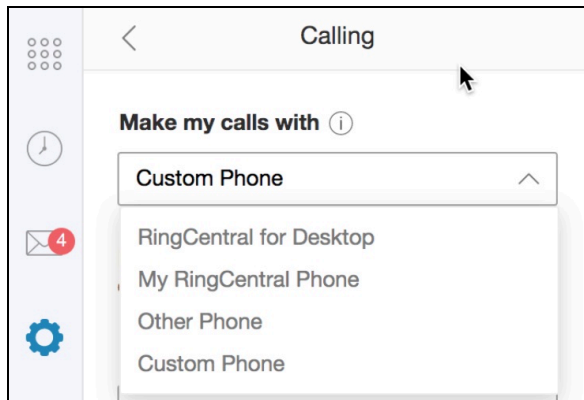
Address 1: Country/Region ---

Dialer and Call

Before Calling

RingCentral for Dynamics allows you to place a call in CTI, and connect it with other devices, including the RingCentral Phone desktop app, your other RingCentral phones, or other custom phones.

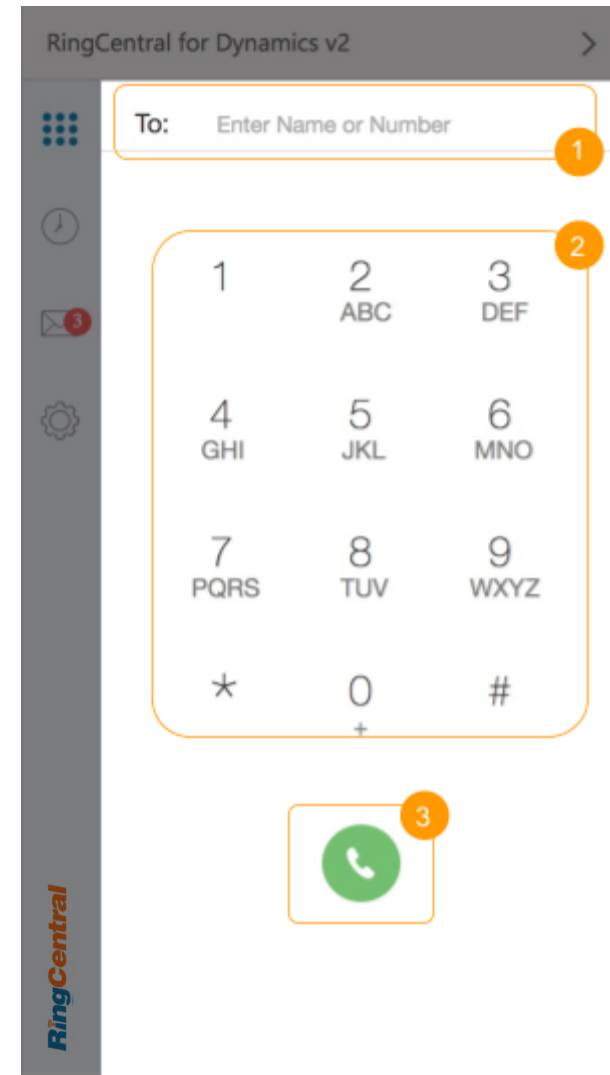
Select call options in **Settings -> Calling**.



There are 3 main areas in the Dialer.

1. The **To:** field allows you to input a phone number directly, or search a contact from Dynamics by name or number
2. Use the **Dialpad** to key in the call number.
3. Select the **Dial** button to connect your call.

You could also dial from the **Dialpad**. And once you click the **Dial** button, a call will be placed and connected following your **Calling** settings.

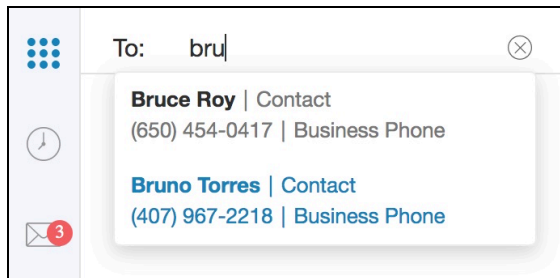


Ways to Place a Call within Dynamics

1. From **Dialer**

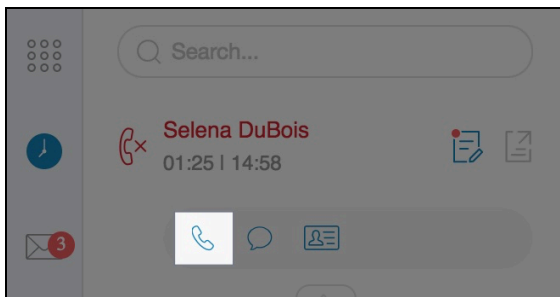
The **To:** field supports searching on three types of entities in Dynamics: **Contacts**, **Leads** and **Accounts**.

Enter a name of a contact for matching entries to display without needing to navigate elsewhere in Dynamics.



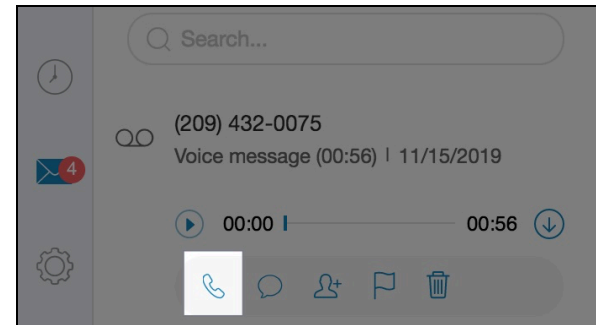
2. From **Call history**

A call button can be found in the extended toolbar for each entry in the call history. Click this button to place a call to this contact.



3. From **Message**

A call button can be found in the extended toolbar for each entry in the Message history. Click this button to place a call to this contact.

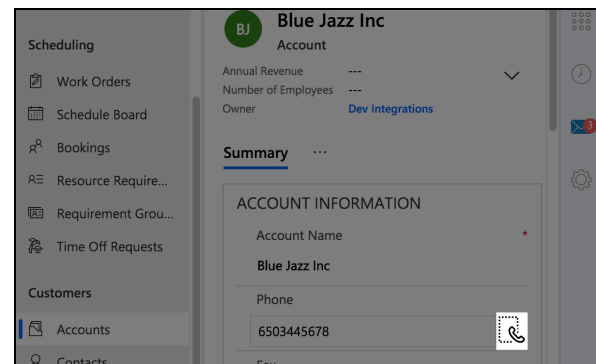


4. **Click to Dial** from Dynamics

One efficient way to make a call is Click to Dial from Dynamics. However, fields must be configured by the Dynamics Admin to enable Click to Dial³.

Once configured, the supported phone field shows the customized phone call icon.

Click this icon to place a call.



³ Configuration please refer to Admin Guide

Call Logs

One of the main benefits of using RingCentral for Dynamics is to log calls and call notes to Dynamics. RingCentral provides the most seamless way to help users succeed.

The Mapping of Call Logs to Phone Call activity

The call log section was designed to match the phone call activity in Dynamics. When a log is automatically or manually saved to Dynamics, the matched fields are filled in and saved.

The “Call Recording” field is customized by RingCentral to log the Call Recording link.

Items	Dynamics	Call log or other source
1	Subject	Subject
2	Call From	Call from (Selectable from matched list. If it was an outbound call, will default fill in current Dynamics user)
3	Call To	Call to (Selectable from matched list. If it was an inbound call, will default fill in current Dynamics user)
4	Phone Number	The phone number of the other party on the call
5	Direction	Inbound or Outbound
6	Description	Description field for taking notes
7	Call Recording	Auto update the link after call ended
8	Duration	Auto update duration after call ended

Outbound to +18885287464
Phone Call · Phone Call ▾

Normal Priority Due Open Status Owner Dev Integrations ▾

Phone Call Related

Subject * Outbound to +18885287464

Call From * Dev Integrations

Call To * Jerry Hardy

Phone Number +18885287464

Direction Outgoing

Phone Call Activity in Dynamics part 1

Create call log ✓

Jerry Hardy 00:10
(888) 528-7464 | Wrong Nu... 11/14/2019

subject* Outbound to +18885287464

Call to Jerry Hardy

Description request a demo.
SE should follow up.
Last day to submit the demo account and env is 12 Dec, 2019.

Call log section in RingCentral for Dynamics

Description

request a demo.
SE should follow up.
Last day to submit the demo account and env is 12 Dec, 2019.

Regarding ---

Call Recording https://[link]

Duration 2 minutes

Phone Call Activity in Dynamics part 2

Call Log

1. Close button allows you to close the current **Call Log** section without changing the current update.
2. The **Save** status button allows you to understand the current saving status of the **Call Log**. When the icon shows:
 - a. **Save**, means that the log was not created or updated in Dynamics. Users are allowed to click the button and save the latest to Dynamics.
 - b. **✓**, means that the log was saved up to date to Dynamics. Any clicks in this status are invalid.
3. The **Call Information Card** helps you to understand the current status of the call. When the background color is green, the call is active. And grey means inactive.
 - a. **Caller Name** will be the same as the one you selected in **Call to** field. If it was a single match number, App will just show the matched names.
 - b. **Caller ID**, the phone number will be shown.
 - c. Real time **Call status** will be shown after the Caller ID.
 - d. **Duration** and **Call time** will also be shown in the card.
4. The main log section area was filled by fields maps to a **Phone Call Activity** in Dynamics.
 - a. **Subject** was default as 'Inbound from' or 'Outbound to' a phone number or the name of a matched entity, to save user's typing effort. However users could update the subject as needed.
 - b. The **Call to** (or **Call from** if inbound) field allow users to select matches if there are many. Once clicked, a matched list will be shown and users could pick from it. In this version, **Accounts**, **Contacts** and **Leads** are supported to be matched in this field.

- c. The Description field will automatically resize to the content. At most 10,000 characters are supported in this field.

RingCentral for Dynamics v2

Close (1) Create call log Save (2)

Call Information Card (3):
 Bruce Roy
 (650) 454-0417 | Connected
 01:07
 2:12 PM

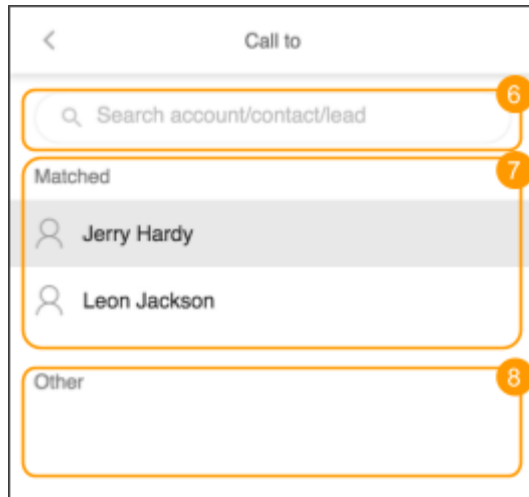
subject* (4)
 Outbound to Bruce Roy

Call to
 Bruce Roy

Description
 Mr. Roy is interested in our CRM products. A meeting should be setup tomorrow.

Toolbar (5): Microphone, Contacts, Pause, End Call

5. While the call is active, you can find a call control panel in the Call Log section. In this version, a user can control the call without leaving Dynamics. You can **Mute**, **Transfer**, **Hold**, and **Hang Up** the call within the Call Log.
6. The **Search field** displays a matched list, allowing users to filter from matched results.
7. The **Matched list** shows all matched entities including **Accounts**, **Contacts** and **Leads**.
8. Dynamics allows users to change entities in Activities. Unmatched entries display in the **Other** field.

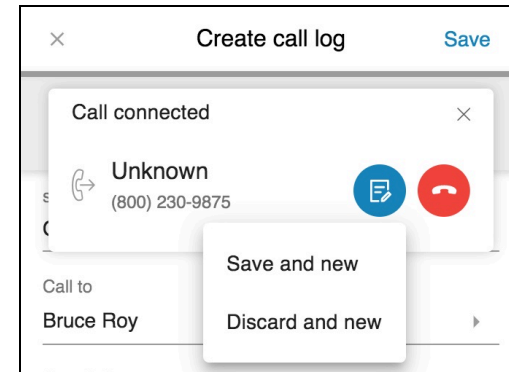
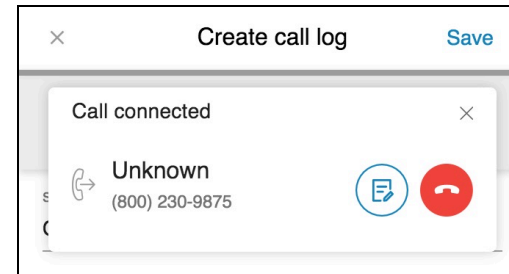


Call Notification When Taking Notes

When a new call comes in while in note taking mode, an Active Call notification pops up. You can choose to:

- **Ignore** this call by clicking the close button.
- **Hang Up** this call, or send an inbound call to voicemail.

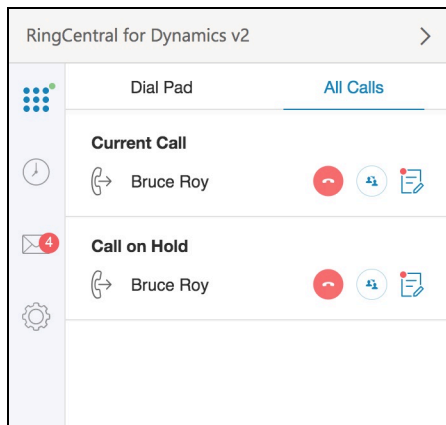
- **Take log** action by selecting:
 - **Save and new**, save the current log and go to new.
 - **Discard and new**, discard the current log and go to the new one.



Swiftling from Active Calls

In the case of multiple simultaneous calls which all require notes, go to the Dialer page and select the All Calls tab.

Note: The All Calls tab only appears when there are active calls, and only active calls are listed. A completed call is listed on the History page. You can choose to Hang Up the call, Transfer it, or go to the Call Log section from the call list.

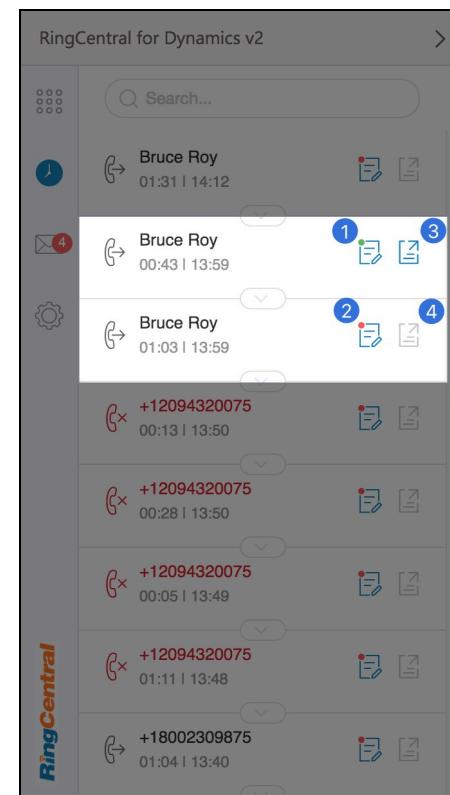


Entries to Call Log

You can take notes for Active or Historical calls. The History page shows call history for the past 7 days. A Log icon with Log status (Icons 1 and 2) and a View in Dynamics icon (Icon 3) display next to the call history entry.

Green or red indicators show whether the call or note has been logged in Dynamics. Green indicates the call or note has been logged, red indicates it has not been logged (Icon 2).

The View in Dynamics icon (Icon 3) is only available when the call has been logged to Dynamics. Clicking this icon opens the Activity in Dynamics. If it has not been logged, the icon is greyed out (Icon 4).



Logging: Manual and Auto

RingCentral for Dynamics is all about Call logging. To help users increase the efficiency of call logging, **Auto Log** feature was introduced.

In the **Settings** page, **Auto log calls** and **Auto log notes** options was listed.

Auto log calls	<input type="checkbox"/>
Auto log notes	<input type="checkbox"/>

Manually Log

When both of these options are **OFF**, the app is in manually log status. The app will not log any calls to Dynamics unless user click the **Save** button.

Auto Log

When **Auto log calls** is **ON**, all calls are logged into Dynamics with basic call information.

Auto log notes is only available when **Auto log calls** is **ON**.

When **Auto log notes** is **ON**, all updates in call log sections are automatically saved and updated to Dynamics **Phone Call Activities**.

RingCentral for Dynamics v2

×

Create call log

Save

Bruce Roy

(650) 454-0417 | Connected

01:07
2:12 PM

subject*

Outbound to Bruce Roy

Call to

Bruce Roy

Description

Mr. Roy in interested in our CRM products. A meeting should be setup tomorrow.

Manually Save mode
Click the Save button to save log

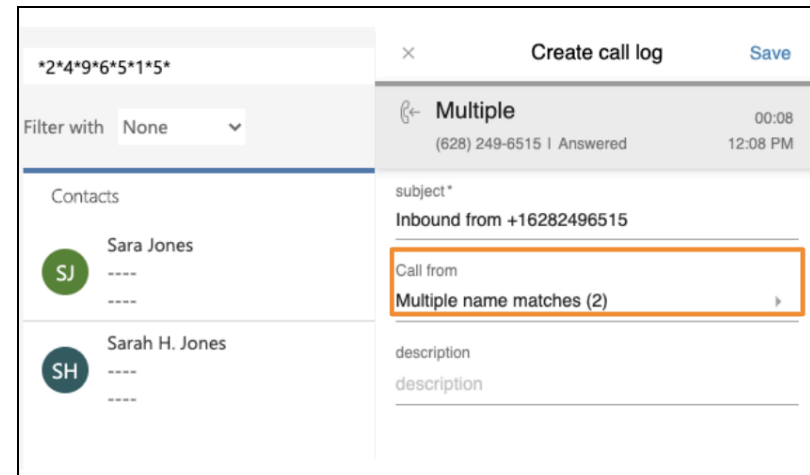
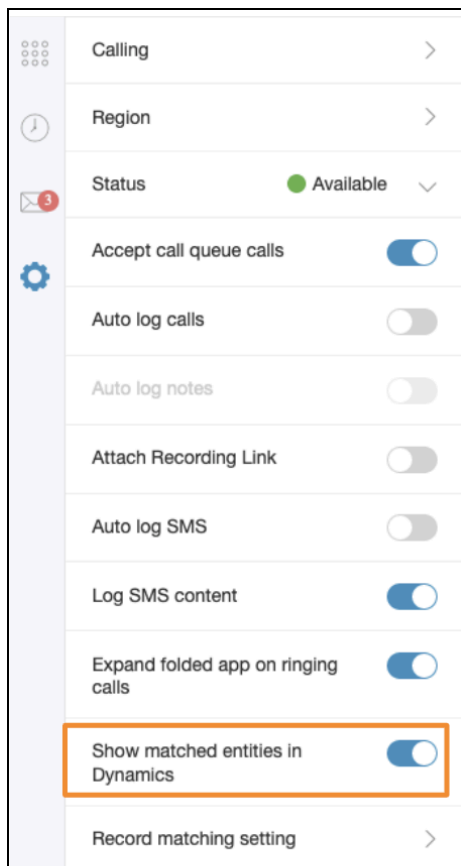
Auto log calls mode
The call information part will be auto saved to Dynamics creating new activity

Auto log calls mode
The note context part will be auto saved or updated to activity in Dynamics

Show Matched Entities in Dynamics

Show matched entities (Contacts, Lead, Accounts) in Dynamics on inbound calls

If there is only 1 matched record, the detail will be opened automatically



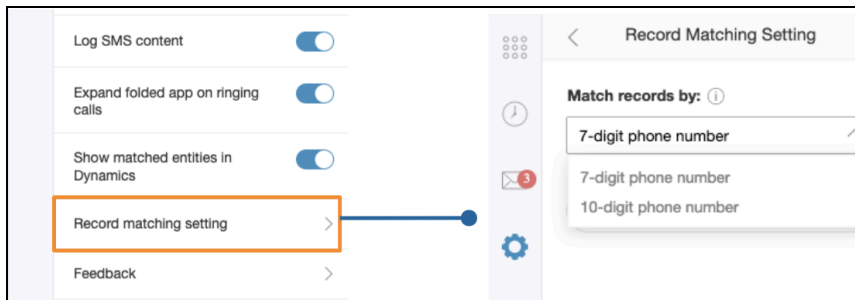
Record Matching Setting

Agents can select from:

- 7 digit search (Default Setting)
- 10 digit search

"7 digit match" is a 7 digit wildcard match that gives better flexibility in addressing inconsistent area codes and international phone formatting.

"10 digit match" is a 10 digit wildcard match that gives more focused results.



Example



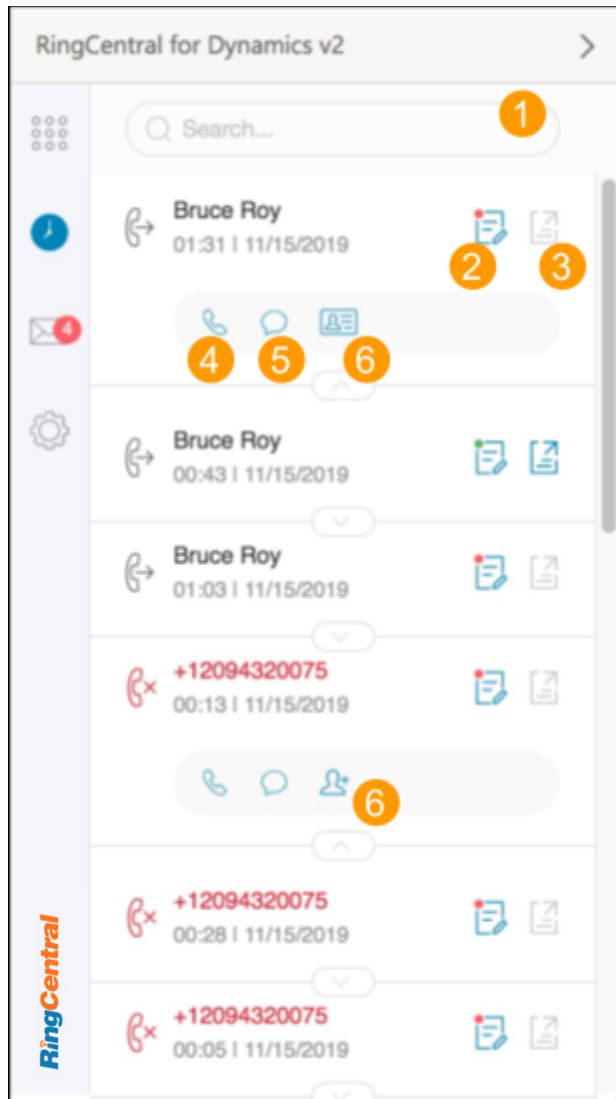
Dynamics.. A **green** marker means it has been logged to Dynamics.

3. **View in Dynamic** button
This function is available after a call has been logged. Clicking this button opens the logged activity in Dynamics.
4. **Call** button
Click to call this contact using current Call setting.
5. **SMS** button
Click to edit and send SMS to this contact.
6. **Add Contact / View Contact** button. If the phone number is
 - No match
Show **Add Contact** icon. Click to create a new entity.
 - Signal match or Selected in logs
Show **View Contact** icon. Click to view contact in Dynamics.
 - Multiple match without selection
Show **View Contact** icon. Click to open Search Result in Dynamics for this phone number.

Call History

The History page lists calls from the past 7 days. In this view, you can see the call **Direction**, **Caller ID**, **Call date**, and **Duration**. Additional information is available::

1. **Search** bar
Allow users to filter call history from current list (last 7 days) with keyword **Name** and **Phone Number**.
2. **Log** button
Open the call log for editing, to log, or update. A **red** marker indicates history for this call has not yet been logged to



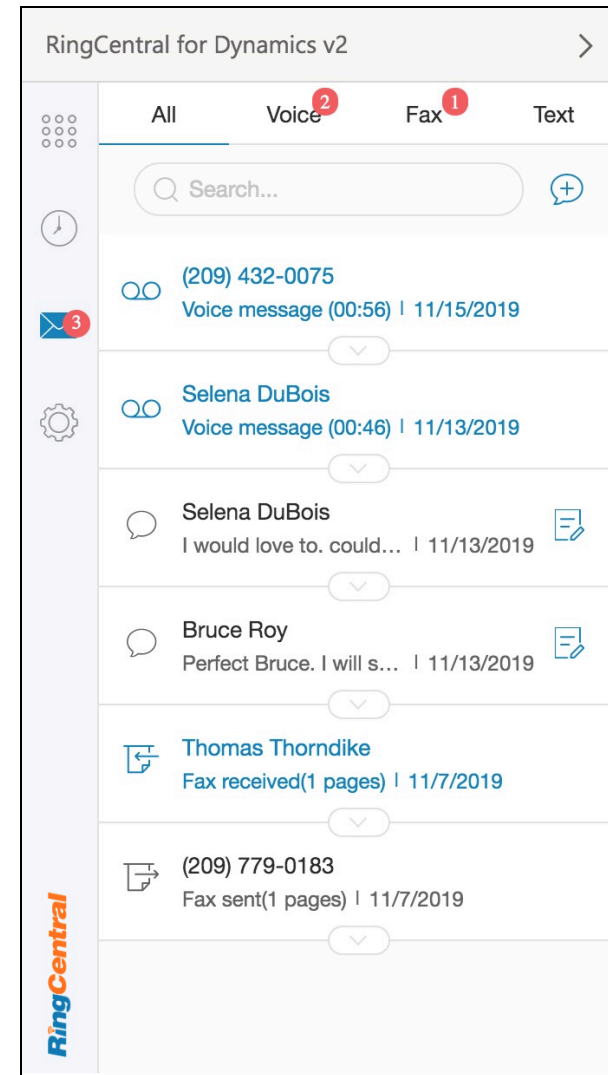
Message and SMS

RingCentral for Dynamics features additional messaging features:

- Sending SMS
- Receiving SMS
- Receiving Fax
- Receiving voice messages.

All messages are listed in the **All** tab. Users can filter using the Search bar with keywords for **Name**, **Number**, and **SMS content**.

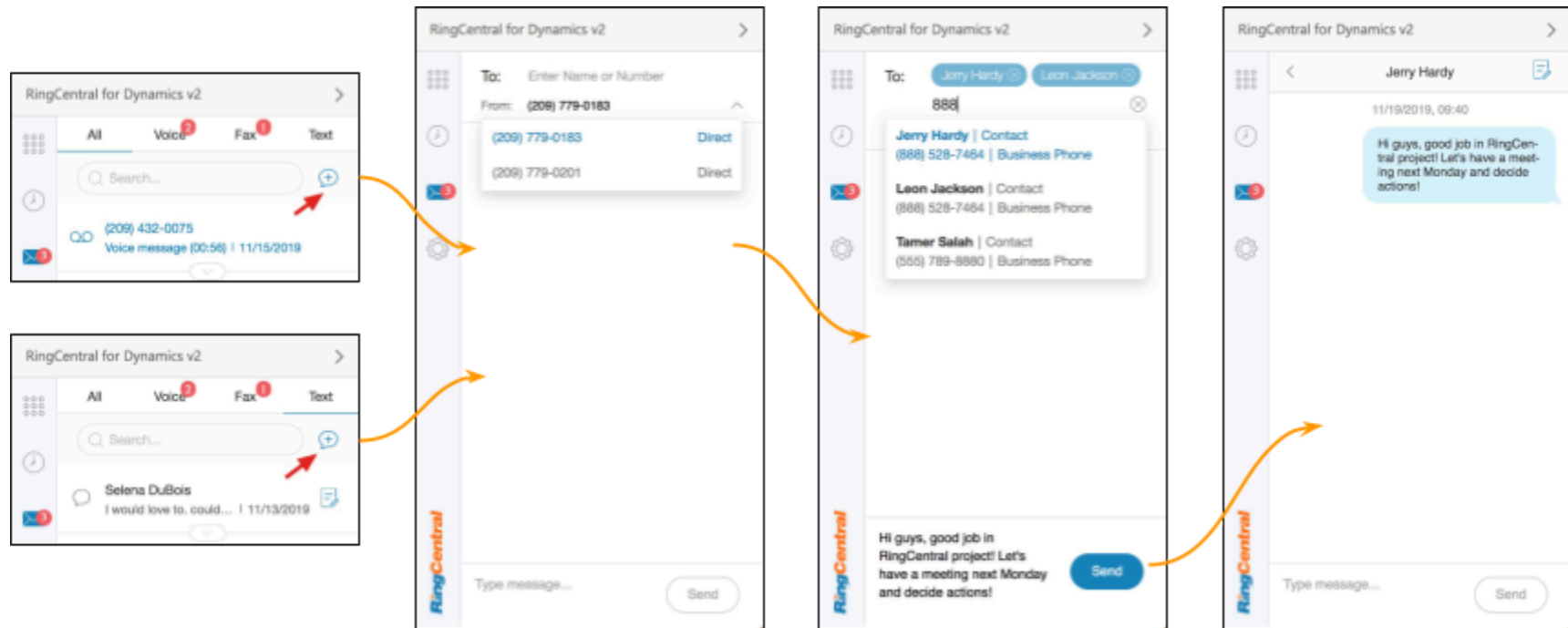
Messages are also classified by type in **Voice**, **Fax**, and **Text** tab.



Sent and Receive SMS

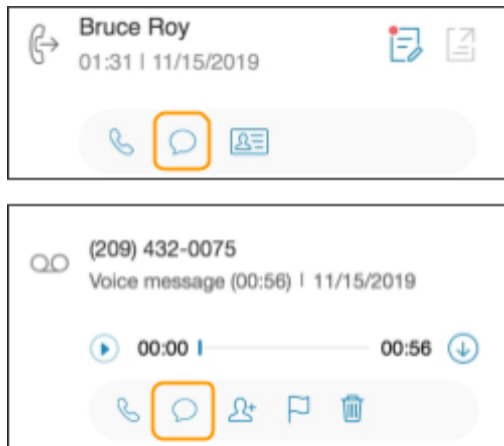
Compose and Send SMS

1. Click the **Compose SMS** button in the **All** tab or in **Text** tab to enter the **Compose SMS** page.
2. Select the number you want to send SMS with, by clicking the “From” dropdown list.
3. Select single or multiple Dynamics contacts in “To:” field.
4. Compose SMS content and click the Send button to send the message.
5. Conversation will be created and recipient can reply to the conversation within it.



Access to SMS

-
- The SMS conversation remains accessible for continued discussion, or a new conversation can be started with the SMS recipient from the call history or voicemail history in the extension toolbar.
-



Log SMS

RingCentral for Dynamics allows users to log SMS as Activity in Dynamics by using Conversations. Logging a Conversation to Dynamics creates a Conversation Activity entry for SMS conversations during the previous 24 hours

Conversation between Dev Integrations and Bruce Roy
Conversation

Normal

11/13/2019 2:53 PM

Open

Dev Integrations

▼

Priority

Due Date

Activity Status

Owner

General

Related

Subject

* Conversation between Dev Integrations and B...

Start Date

11/13/2019

2:53 PM

Correspondent

Bruce Roy

Regarding

Conversation details:

UTC+8 11/13/2019 14:55:07 from Bruce Roy(+16504540417) to Dev Integrations(+12097790183): Perfect Bruce. I will see you tomorrow.
UTC+8 11/13/2019 14:53:06 from Dev Integrations(+12097790183) to Bruce Roy(+16504540417): thanks for inviting. I will skip the lunch tomorrow, but let's meet as the cofoe next to the building around 14 PM tomorrow.

Timeline

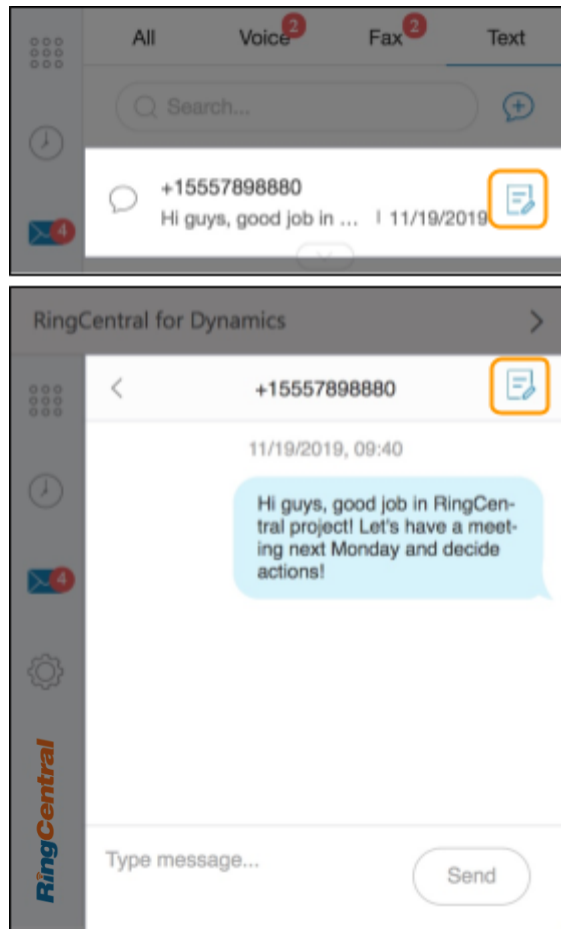
+ ▼ ...

Enter a note...

No records to show.

Manually log SMS

A Log button available in both conversation items and the conversation trail enables you to begin logging the conversation. If this is a new conversation, the app creates a new Activity. If this is a continuation of an existing Activity, the app updates to reflect the latest content.



Auto log SMS

If **Auto log SMON** in the **Settings**, all SMS will be saved to **Activity** with the matched Contact/Lead/Account, following the SMS log rules.

Auto log SMS



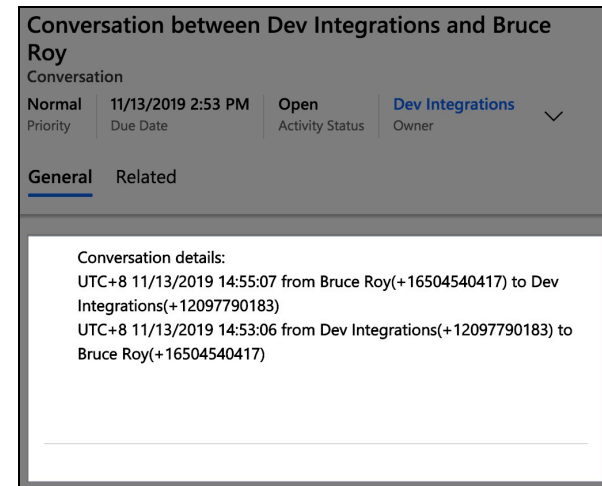
Log SMS content

When Log SMS Content is set to ON, the content of each message is captured, whether saved manually or automatically.

Log SMS content



With this toggle set to **OFF**, only the timestamps of the SMS events will be saved to Dynamics.

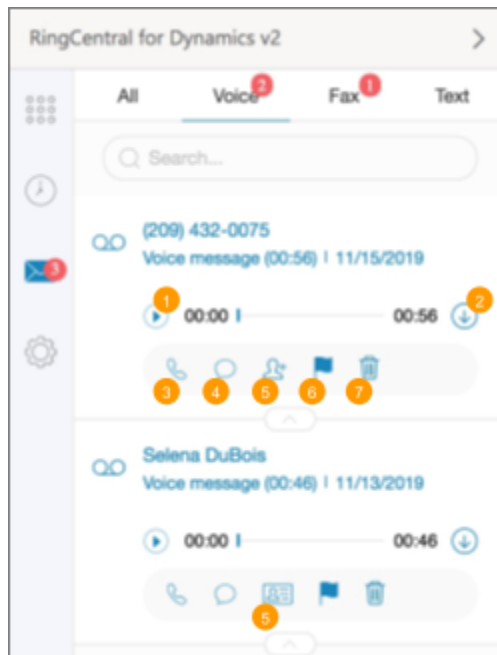


Voicemail

RingCentral for Dynamics offers rich features for Voicemail. Newly received voicemails are listed in both the **All** tab and in the **Voice** tab on the Message page.

Expanding the toolbar shows all available tools

1. **Play voicemail**
2. **Download voicemail**
3. **Call back**
4. **Sent an SMS**
5. **Add contact / view contact**, depending on whether it is a new or existing contact in Dynamics.
6. **Mark as read / unread**
7. **Delete voicemail**



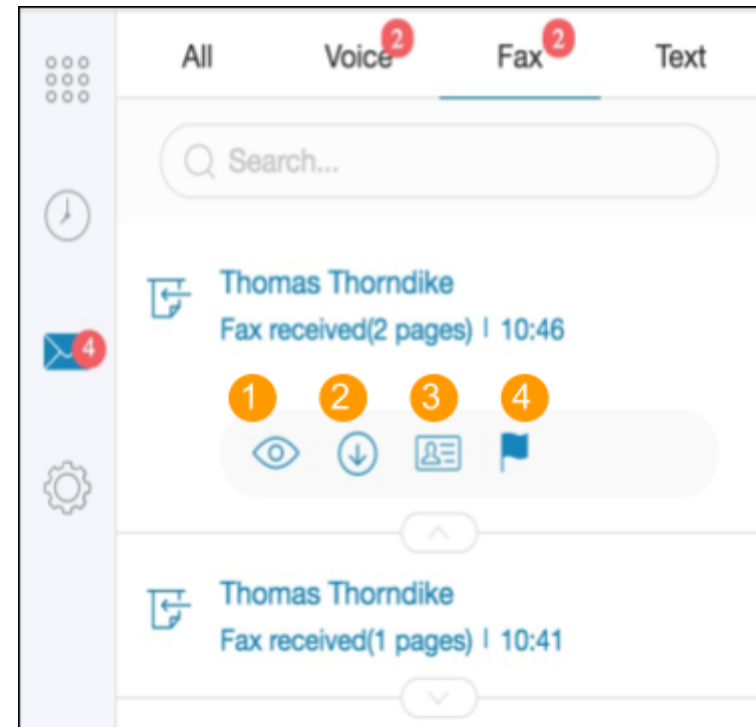
Fax

Users are able to receive faxes in RingCentral for Dynamics.

When a fax is received, it is listed in the **All** tab and the **Fax** tab in the **Message** page.

Expanding the toolbar shows all available tools: :

1. **View Fax**
2. **Download Fax**
3. **Add contact / View contact**, depending on whether this is a new or existing contact in Dynamics.
4. **Mark as read/unread**



FAQ

Q: What operating systems are supported?

1. Windows 7+
2. Mac OS

Q: What browsers are supported?

1. Microsoft Edge
2. Google Chrome

For more details about the system requirements, see docs.microsoft.com.

Q: I don't see any new tab or window opening on incoming calls.

A: When a call comes in, it rings on your softphone (or any other client with the same account), and the call log section in RC for Dynamics with matched entities will expand from the sidebar

Q: Can I use RingCentral for Microsoft Dynamics across multiple browsers (Internet Explorer and Firefox, for example)?

You can use RingCentral for Dynamics on Microsoft Edge and Google Chrome

Q: I can see some phone numbers in Dynamics, but the click-to-call icon is not displayed.

A: It must be a "Phone" field, and all fields you need to support C2D must be separately configured by your admin following the admin guide.

Q: What features will the new version of RC for Dynamics provide?

1. RC for Dynamics v2.0 supporting official CIF (Channel Integration Framework).
2. Active call control within CTI - Dialer and All Calls tab - (answer, hang up, mute, hold).
3. Screen pop/Create call logs: set subject, recipient, take notes, and access call controls
4. Contact match when entering phone number in CTI dialer.
5. Call history: Create a new log on a historical call.
6. Settings: enable auto log notes, set RingCentral presence (across all endpoints).
7. Message hub: view complete list of texts, Fax, and Voicemails from CTI.

Q: Why don't I see RC applications when I minimize the application?

A.

Microsoft recently introduced a native sidebar with the 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 the RC app is 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.