

RingCentral for Dynamics V2 Admin Guide

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Install from AppSource



Install form AppSource Steps

1

Install CIF from
AppSource

2

Install RingCentral
for Dynamics from
AppSource

3

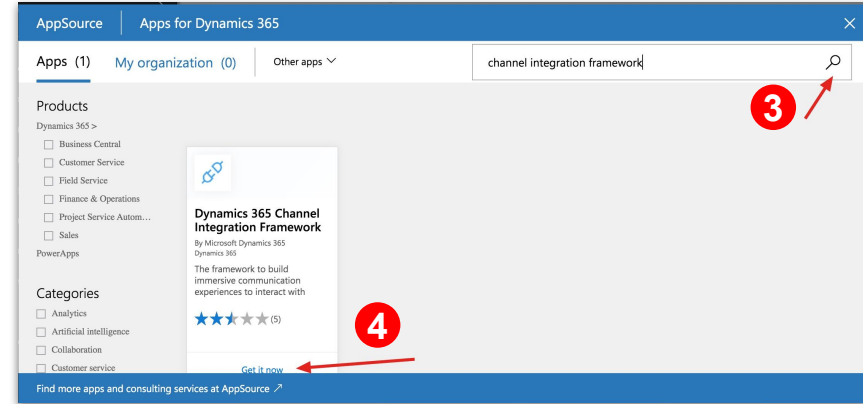
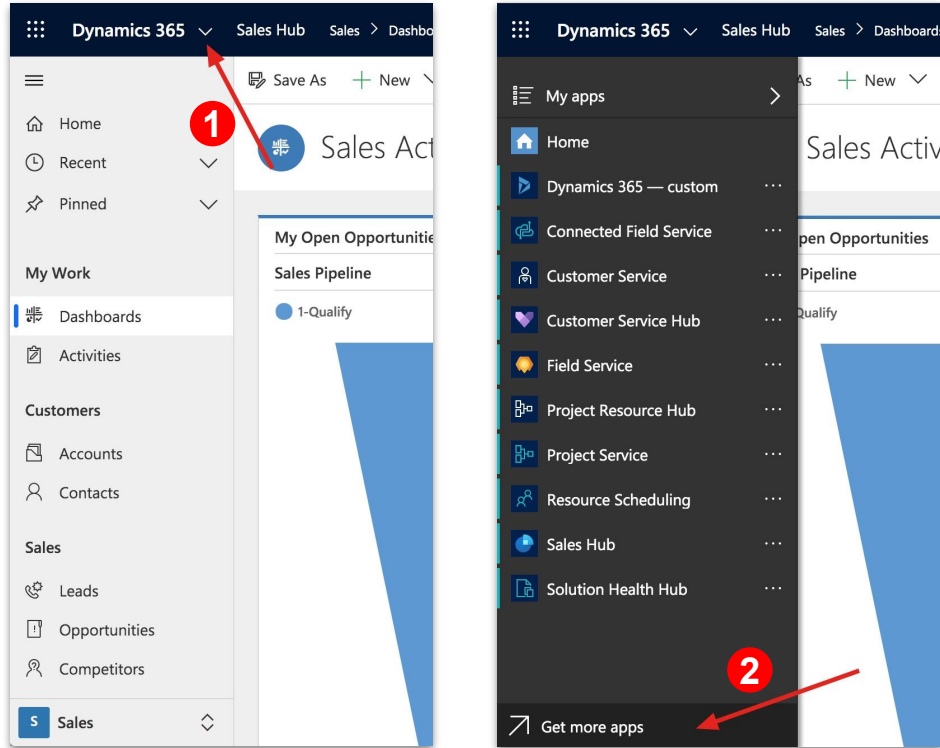
Configure CIF to
enable RingCentral

4

Configure Click to
Dial in Dynamics

Step 1: Install CIF

1.1 Search in AppSource



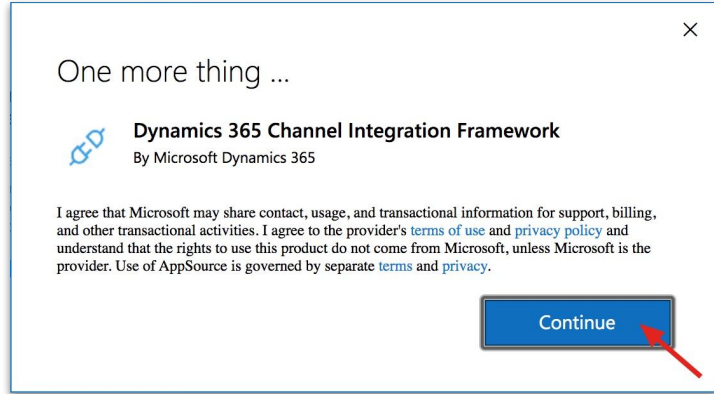
1 & 2 Open AppSource

3 Search “channel integration framework”

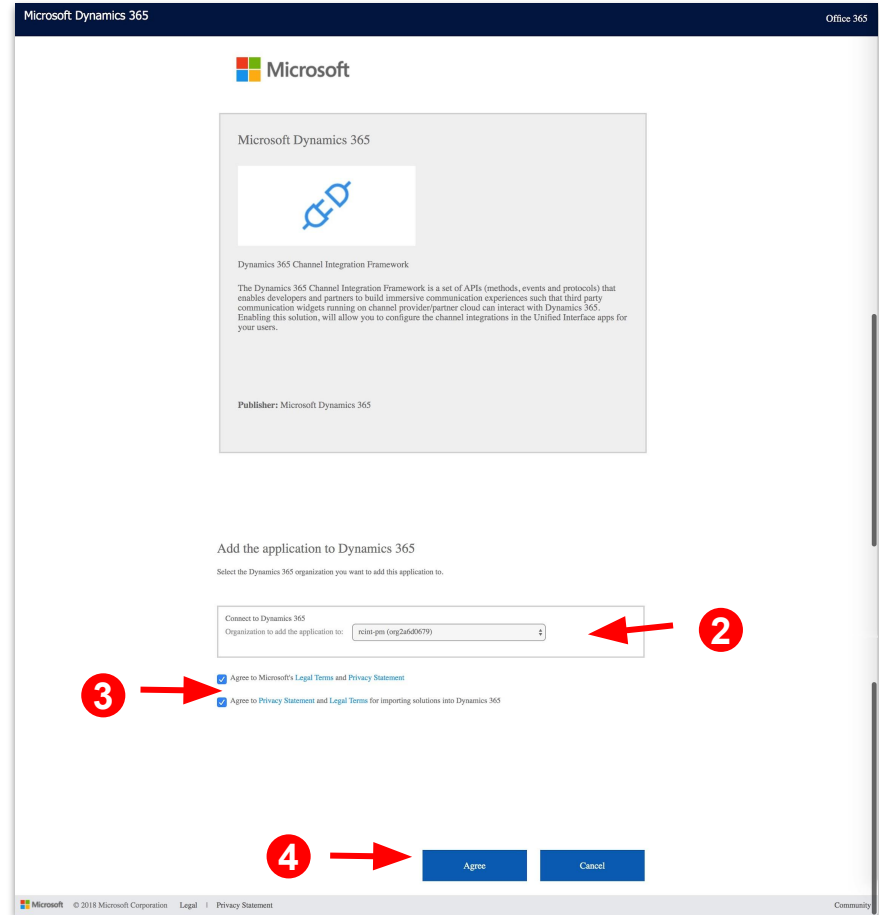
4 Click “Get it now”

Step 1: Install CIF

1.2 Install CIF 1/2

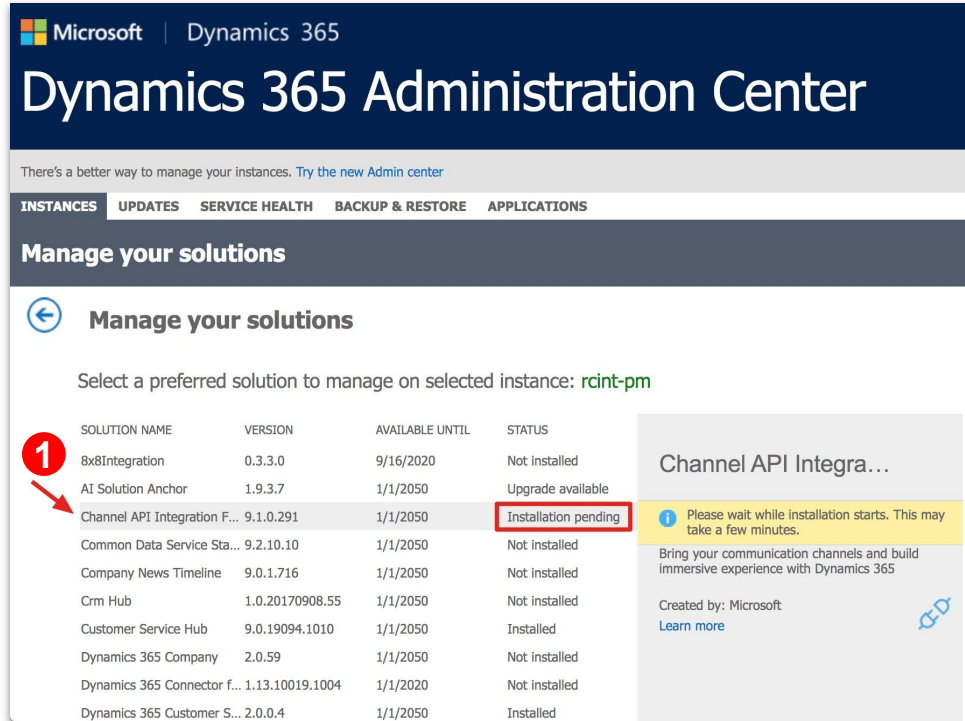


1. Click “Continue” if you want to install CIF.
2. Choose the Organization where CIF is to be installed.
3. Review the terms details from Microsoft.
4. Click “Agree” to continue.



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

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

The first screenshot shows the Microsoft AppSource page for RingCentral for Dynamics 365. The 'Get it now' button is highlighted with a red circle containing the number 1.

The second screenshot shows the Power Platform admin center 'Dynamics 365 apps' list. The 'Install' button for RingCentral for Dynamics 365 is highlighted with a red circle containing the number 2.

The third screenshot shows the 'Install RingCentral for Dynamics 365' dialog box. The 'Select an environment' dropdown menu is highlighted with a red circle containing the number 2.

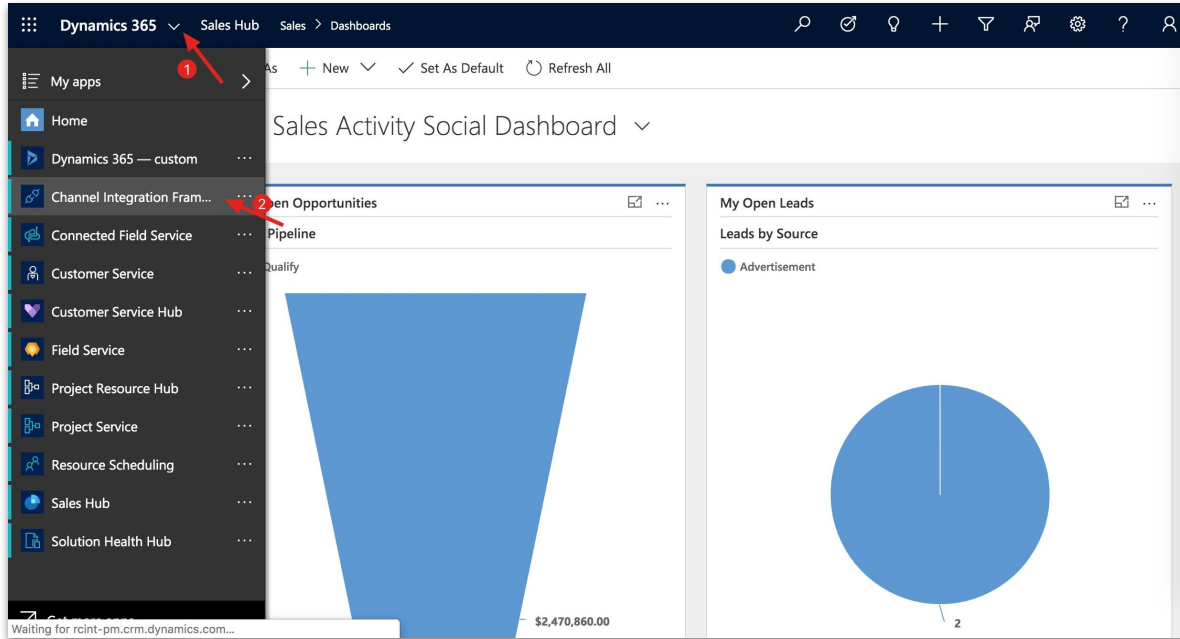
The fourth screenshot shows the 'Environments' list in the Power Platform admin center. The 'RingCentral for Dynamics 365' entry is highlighted with a red circle containing the number 3.

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

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

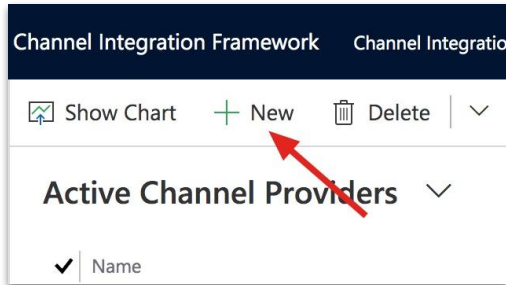
3.1. Go to Channel Integration Framework



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 displays the 'New Channel Provider' configuration page. The left sidebar shows navigation options: Home, Recent, Pinned, Channel Provider Configuration, and Channel Providers. The main content area is titled 'New Channel Provider' and 'Channel Provider Configuration'. The form includes the following fields:

- Name: RingCentral
- Label: RingCentral for Dynamics v2
- Channel URL: https://rcint-pm.crm.dynamics.com/... (with a globe icon)
- Enable Outbound Communication: Yes
- Channel Order: 0
- API Version: 1.0
- Trusted Domain: ---
- Custom Parameters: ---

Below the form fields, there are two sections for selecting unified interface apps and roles:

- Select Unified Interface Apps for the Channel:** This section shows 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 an 'Enter text here' search box.
- Select the Roles for the Channel:** This section has an 'Enter text here' search box.

The bottom of the page shows a status bar with 'Active', 'unsaved changes', and 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


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

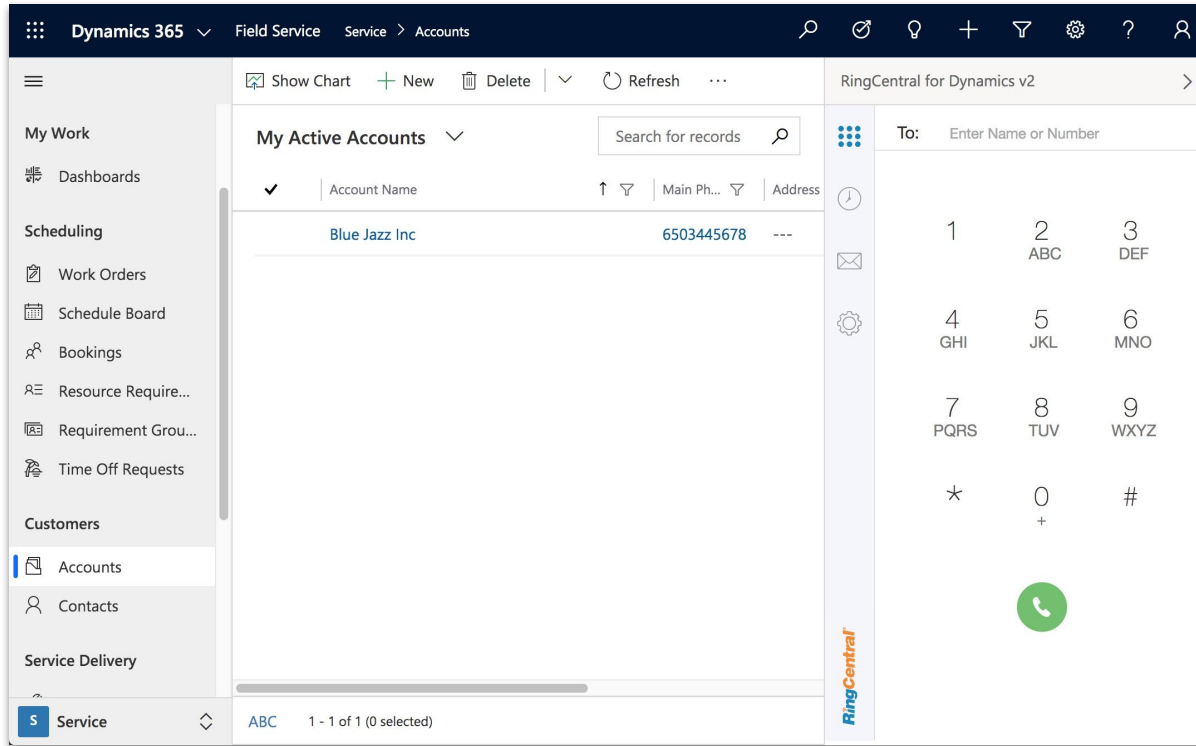
3.4. Activate the App

The screenshot shows the Dynamics 365 interface for managing Channel Providers. The breadcrumb trail is: Dynamics 365 > Channel Integration Framework > Channel Integration Framework > Channel Providers. The left sidebar shows navigation options: Home, Recent, Pinned, Channel Provider Configuration, and Channel Providers (selected). The main area displays the 'Active Channel Providers' list. At the top of this list, there are buttons: Show Chart, Edit, Activate (highlighted with a red arrow and number 2), Deactivate, Delete, Email a Link, and Flow. Below these buttons is a table with columns: Name, Channel Order, Label, and a 'Cre' column. The table contains one entry: 'RingCentral' (highlighted with a red arrow and number 1), with a 'Channel Order' of 0 and a 'Label' of 'RingCentral for Dynamics ...'. At the bottom of the interface, there is a pagination bar showing '1 - 1 of 1 (1 selected)'.

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 shows the Microsoft Dynamics 365 interface for the 'Blue Jazz Inc' account. The left sidebar contains navigation options like 'Dashboards', 'Scheduling', 'Customers', and 'Service Delivery'. The main content area displays the 'ACCOUNT INFORMATION' for 'Blue Jazz Inc', including fields for 'Account Name', 'Phone' (6503445678), 'Fax', 'Website', 'Parent Account', 'Ticker Symbol', and 'Relationship Type'. A 'Click to Dial' icon is visible next to the phone number field. The RingCentral interface is overlaid on the right side of the screen, showing a 'To:' field and a numeric keypad with letters (ABC, DEF, etc.) and a green 'Call' button at the bottom.

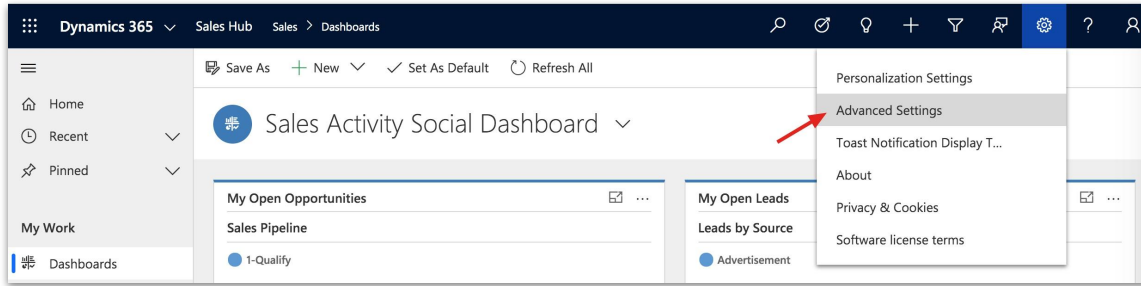
Click to Dial from Phone fields in targeted pages is now available by CIF.

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

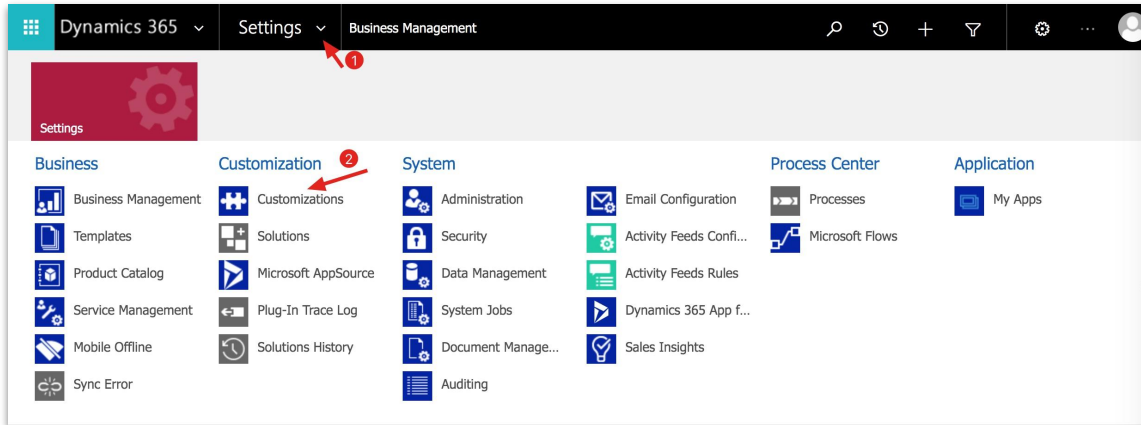
Note: it must be a phone field. and it must be configured in advance.

Step 4: Enable Click to Dial with RingCentral

Step 4.1. Go to Customizations

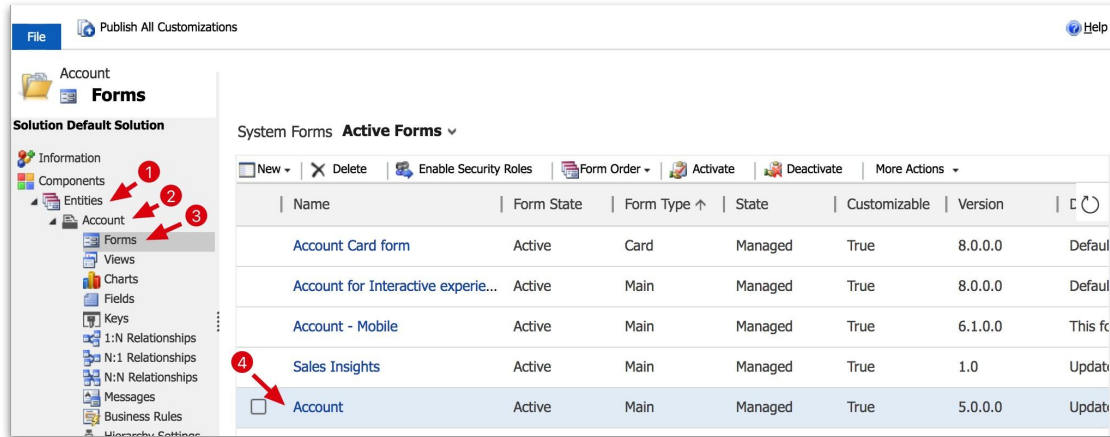
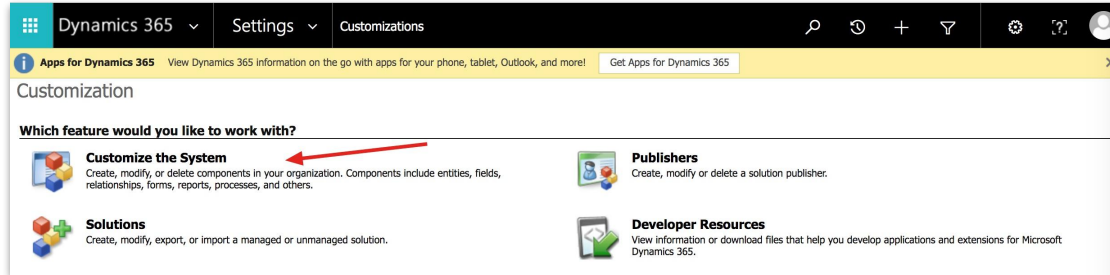


1. Click “Setting” gear icon, select “Advanced Settings” from the list.
2. Click the drop down icon next to “Settings”, and click “Customizations” item.



Step 4: Enable Click to Dial with RingCentral

Step 4.2. Lookup the page you want to customize



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.

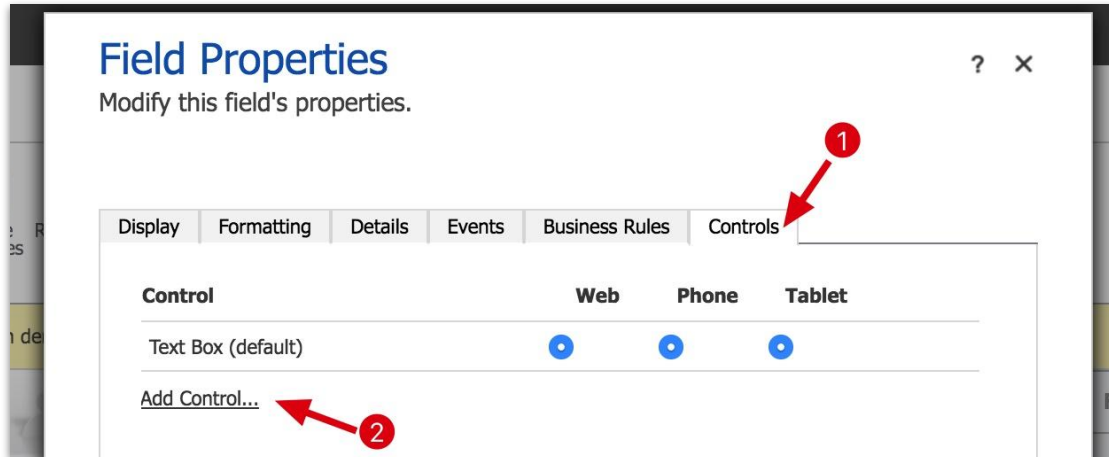
If you want to enable Click 2 Dial in multiple pages of this entity, you will need to customize them all.

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...](#)

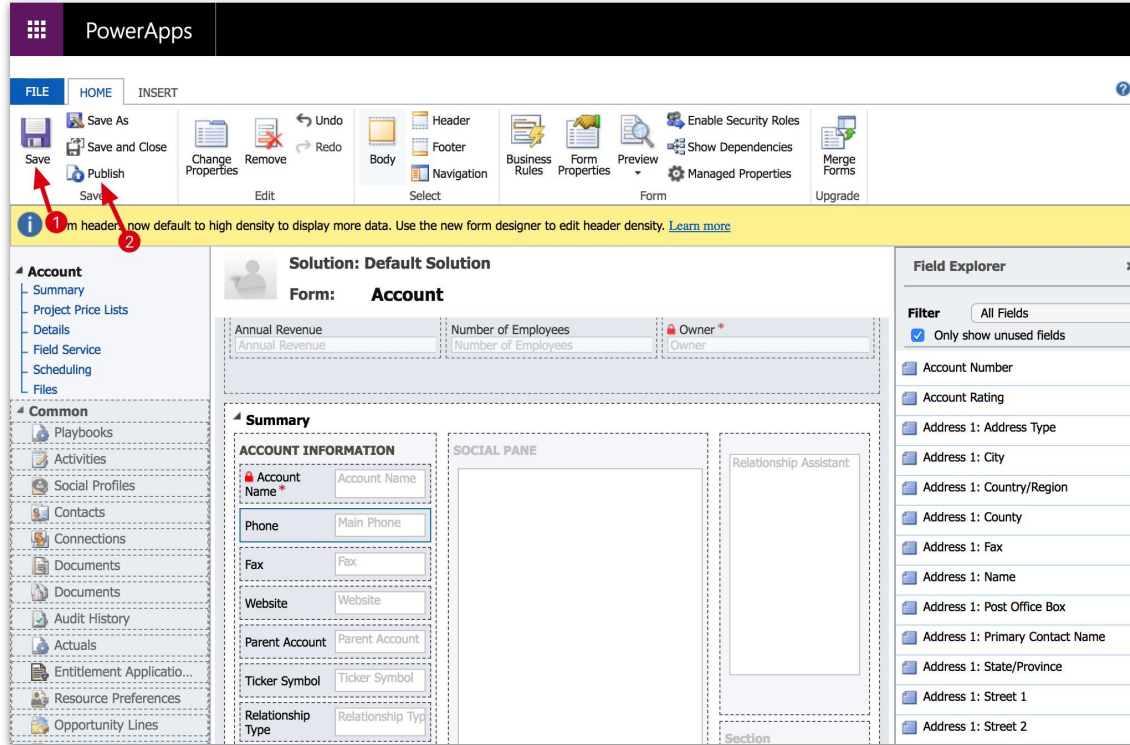
Channel Communication Control

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



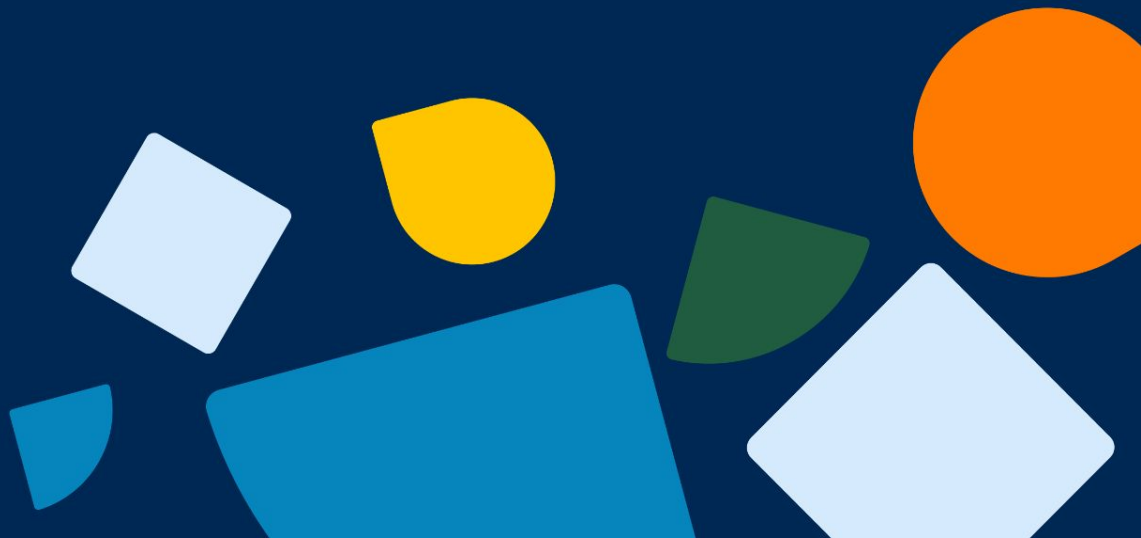
1. Return to main page, click “Save” and then “Publish.”
2. Go the Account page, you will find the call button turn from



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

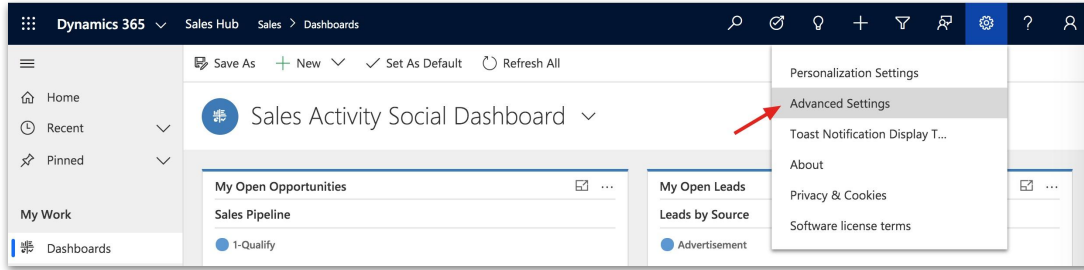
4

Configure Click to
Dial in Dynamics

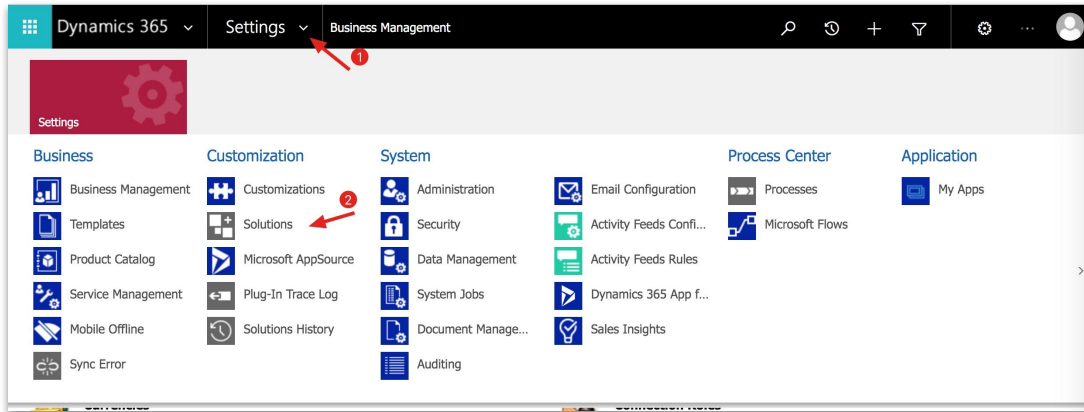
The only difference between install with package and from AppSource, is that in Step 2, administrator needs to import the app from the package manually.

Import RC for Dynamics

1. Go to Dynamics Solutions view

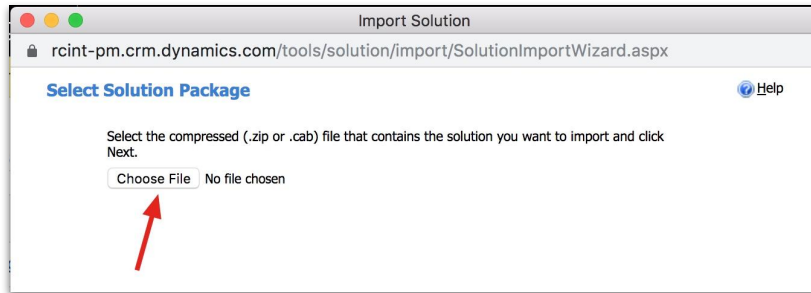
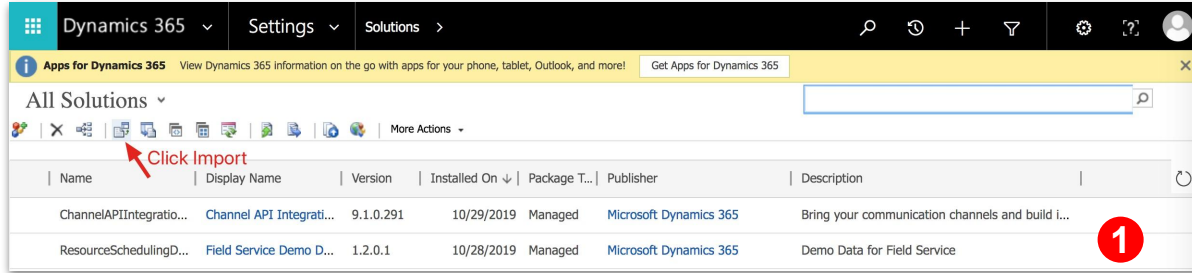


1. Click “Setting” -> “Advanced Settings.”
2. Advance Settings tab will be opened. Click the dropdown icon in “Settings”, and click “Solutions.”



Import RC for Dynamics

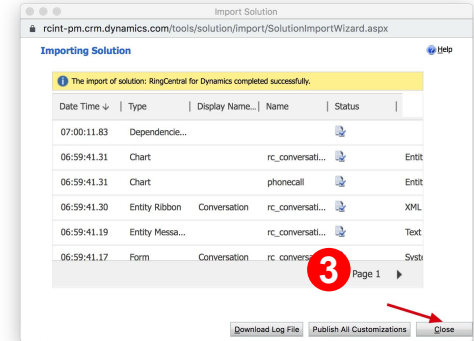
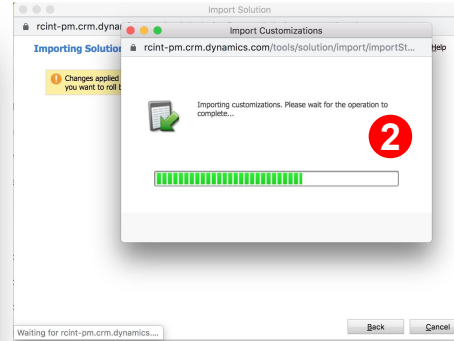
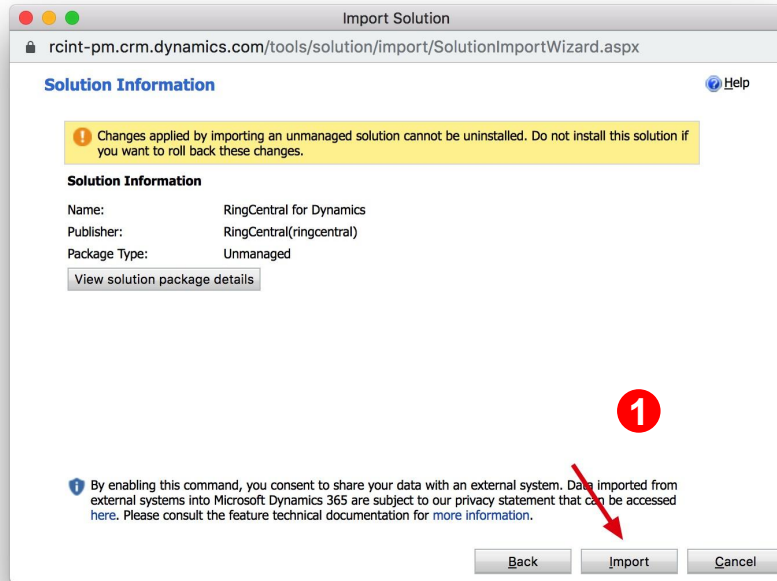
2. Import the RingCentral Solution package 1/2



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



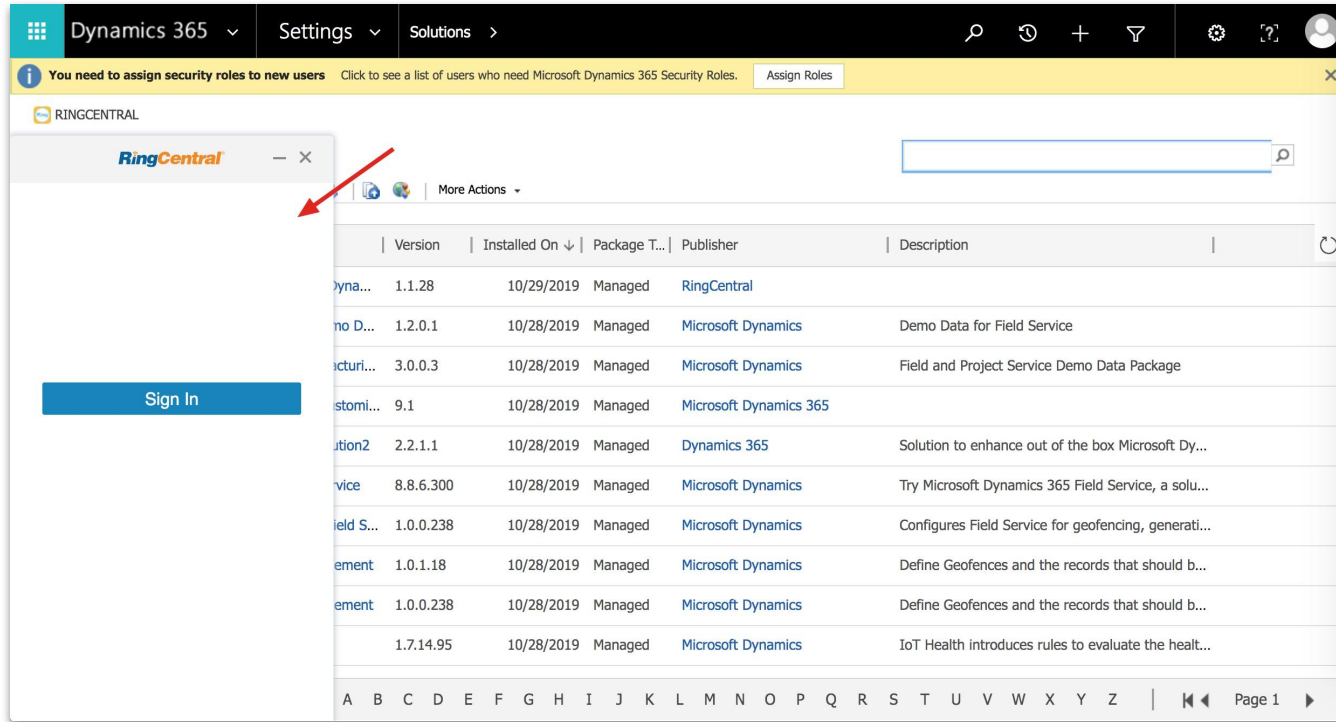
1. Click "Import" button to start importing RingCentral solutions package.
2. The time needed for importing depends on network and server performance
3. Once import is complete, click "Close" button to finish the process.

Install with Package
Install from v1.x



Overview of RingCentral for Dynamics v1.x

How it looks



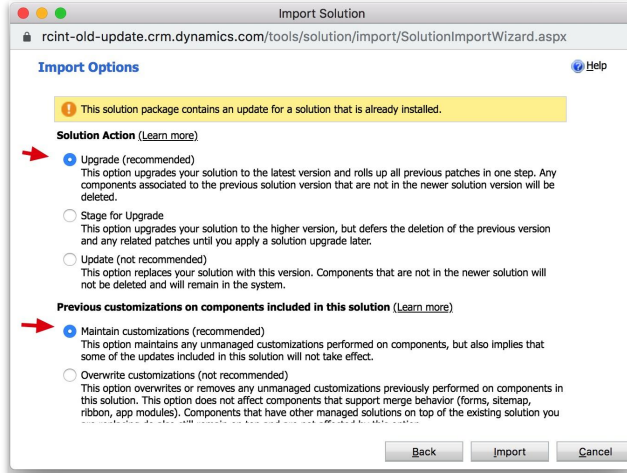
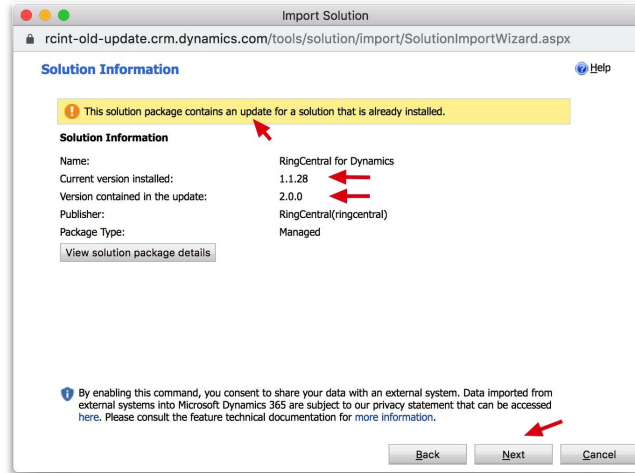
The screenshot shows the Microsoft Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this, a yellow banner states 'You need to assign security roles to new users'. The left sidebar contains the 'RingCentral' app icon, which is highlighted 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.

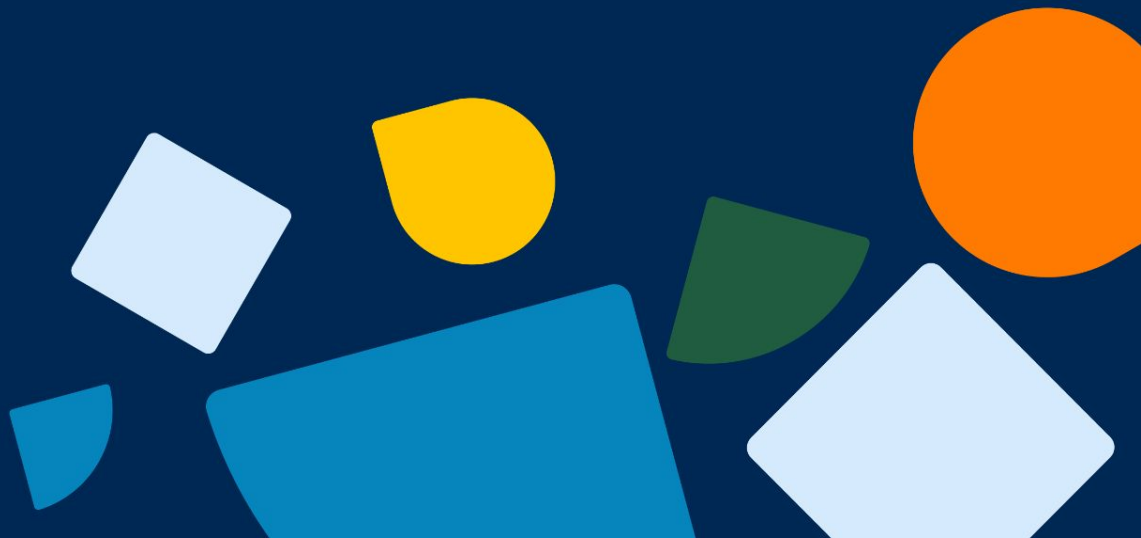
Installing from Old

The difference

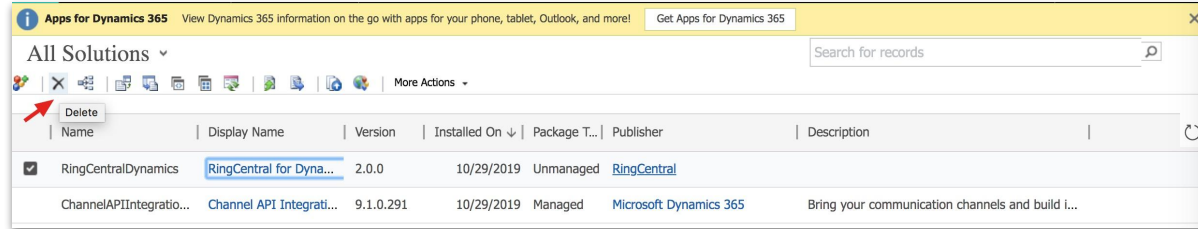


1. Follow the same steps as installing from new detailed in Step 1.
2. When you reach Step 2.2, you will see different popup info illustrated here.
3. Confirm and click Next and Import.
4. Remaining steps are the same as install from new scenario.

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 a table of Active Channel Providers. The table has columns for Name, Label, and Created On. A record for 'RingCentral' 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 in the foreground, asking 'Do you want to delete this Channel Provider? You can't undo this action.' with 'Delete' and 'Cancel' buttons.

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.

