

RingCentral for Dynamics V2 Admin Guide



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2. Manually Install from package
3. Manually Update from v1.x
4. Uninstall

Install from AppSource



Install from AppSource Steps

1

Install CIF from
AppSource

2

Install RingCentral
for Dynamics from
AppSource

3

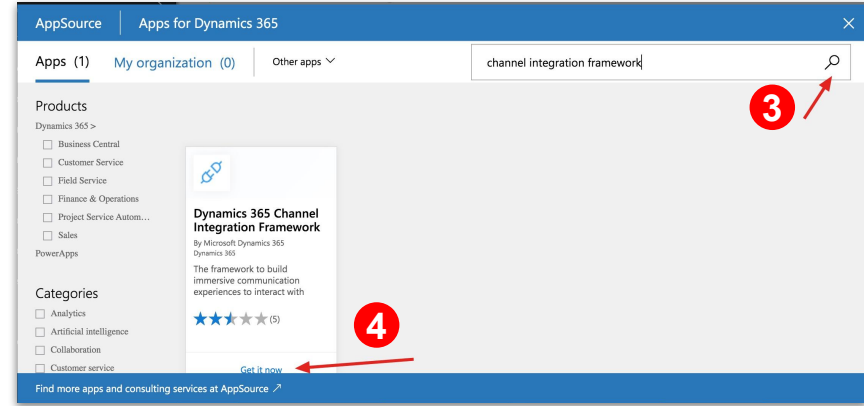
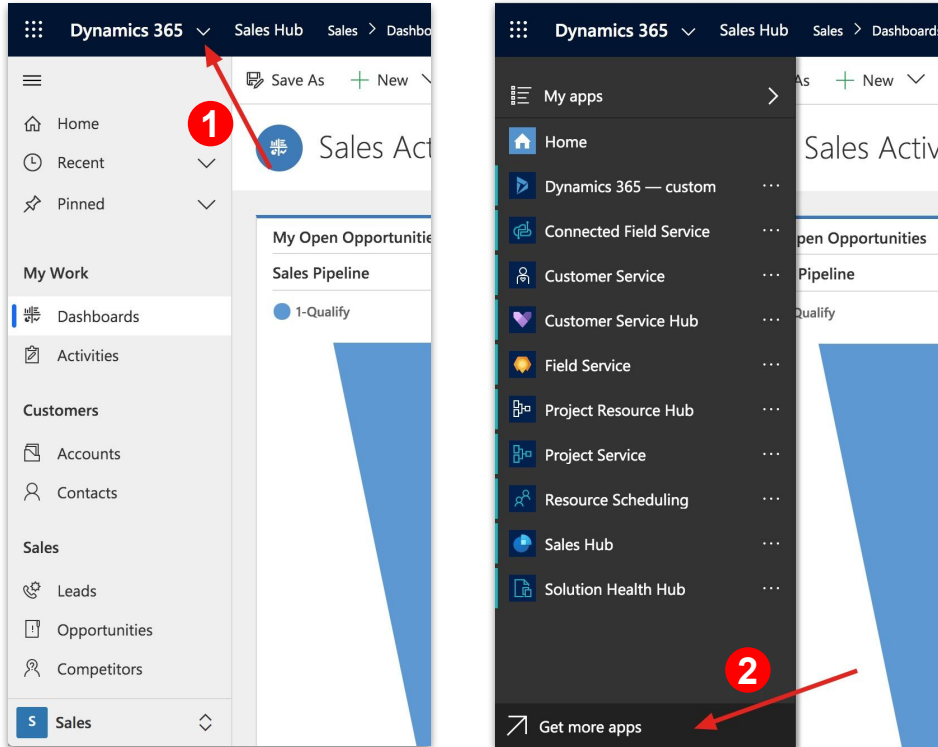
Configure CIF to
enable RingCentral

4

Configure Click to
Dial in Dynamics

Step 1: Install CIF

1.1 Search in AppSource



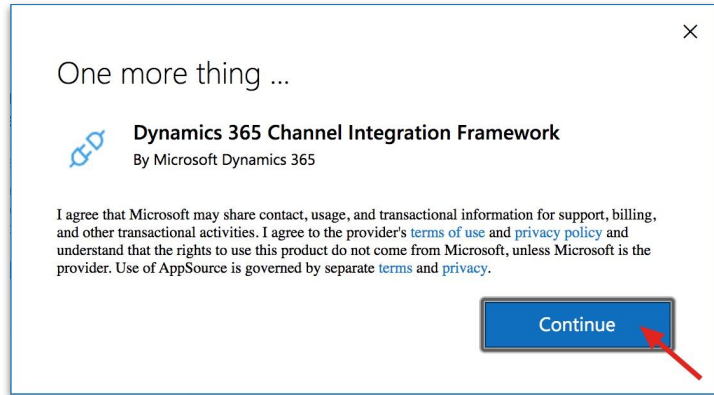
1 & 2 Open AppSource

3 Search “channel integration framework”

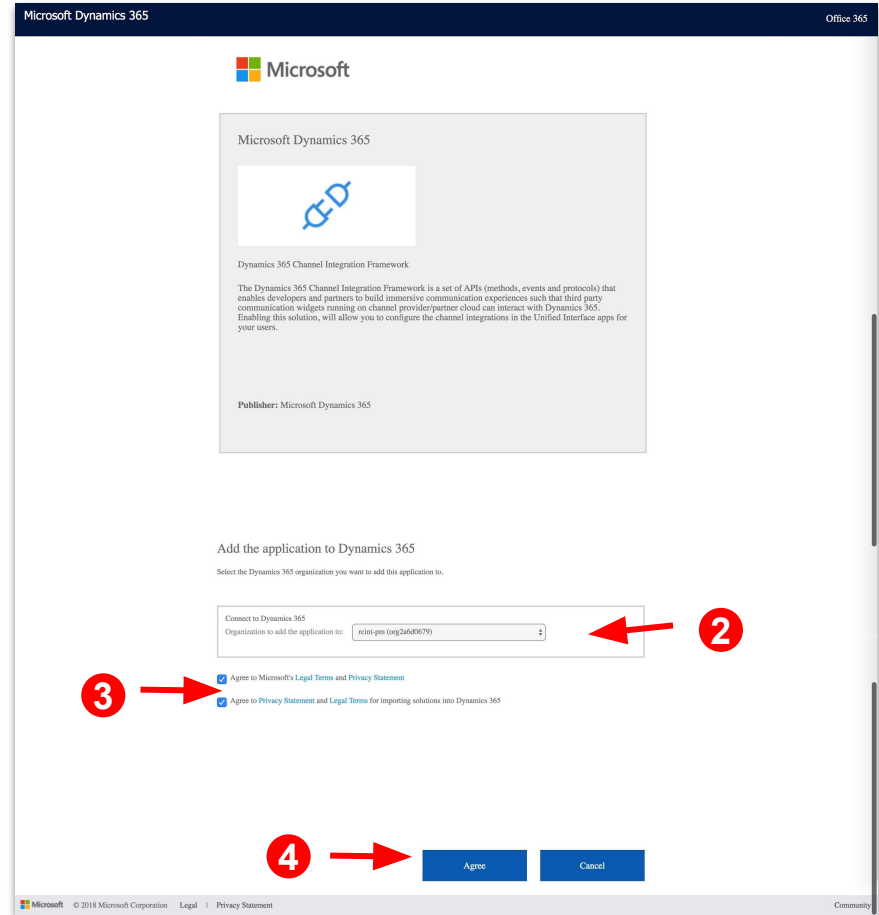
4 Click “Get it now”

Step 1: Install CIF

1.2 Install CIF 1/2

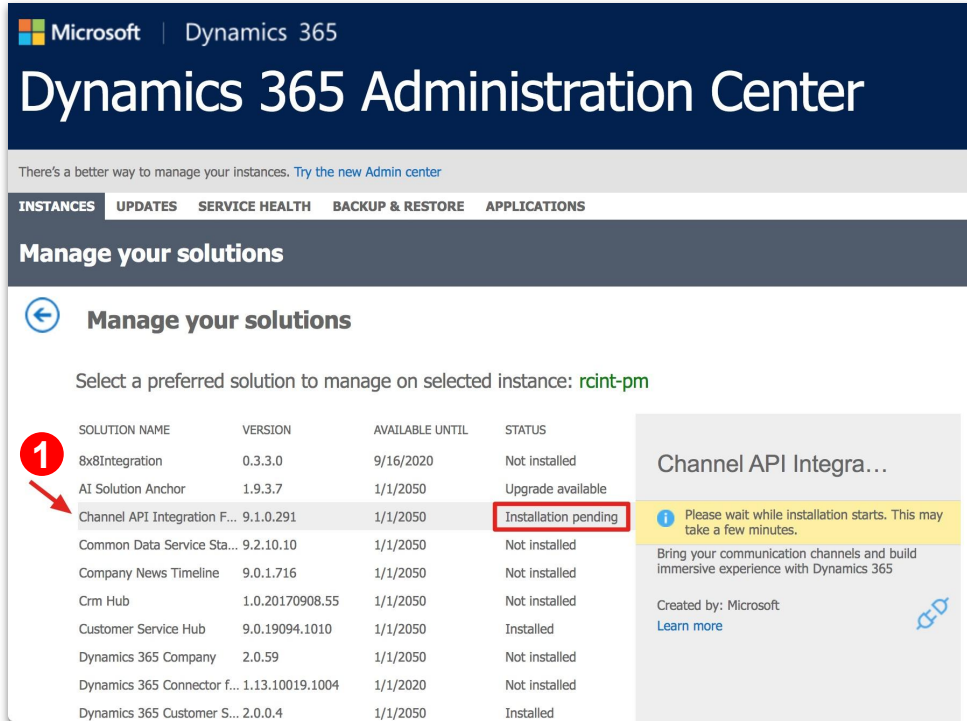


1. Click “Continue” if you want to install CIF.
2. Choose the Organization where CIF is to be installed.
3. Review the terms details from Microsoft.
4. Click “Agree” to continue.



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
Crn 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


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

Microsoft | AppSource More ▾ ringcentral

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**

Overview Ratings + reviews Details + support

Drive productivity by integrating your RingCentral cloud communications solution into Dynamics 365

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...

Power Platform admin center

To manage Power Apps and Power Automate res...

Dynamics 365 apps

See which apps are available to install and configure

Install **Cancel** **2**

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](#)

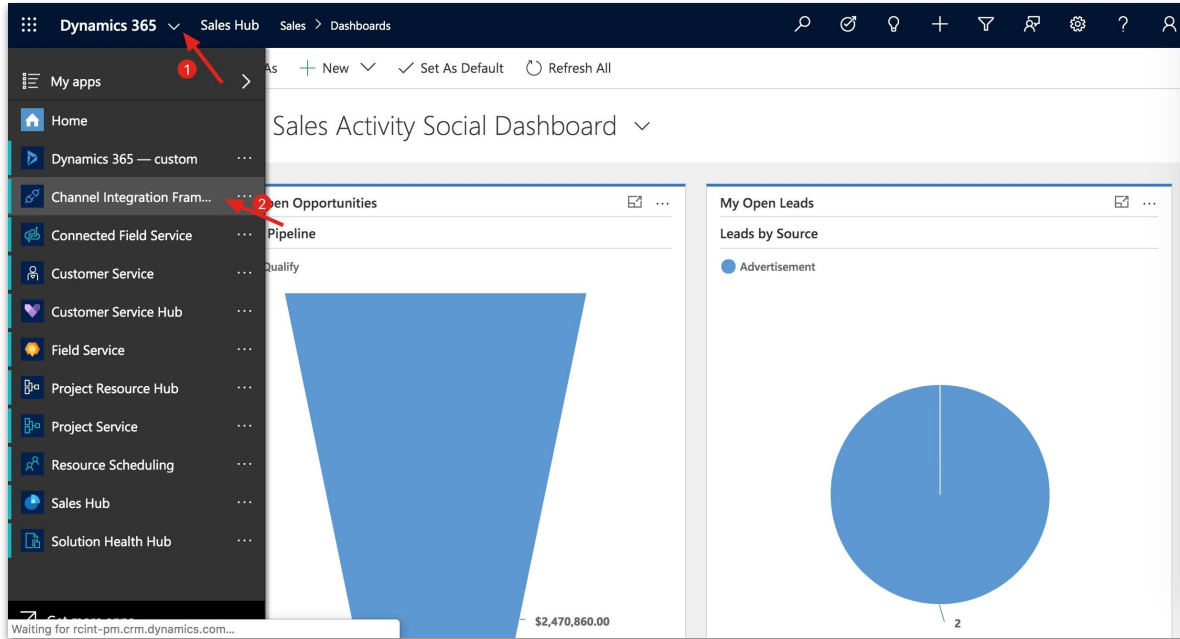
Name ↑	Status	Publisher
Dynamics 365 Customer Voice	Update available	Microsoft Dynamics 365
Environment variables	Installed	Microsoft Dynamics 365
HCM Talent	Installed	Microsoft Dynamics 365
Microsoft Flow Extensions	Installed	Microsoft Dynamics 365
OData v4 Data Provider	Installed	Microsoft Dynamics 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

3

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

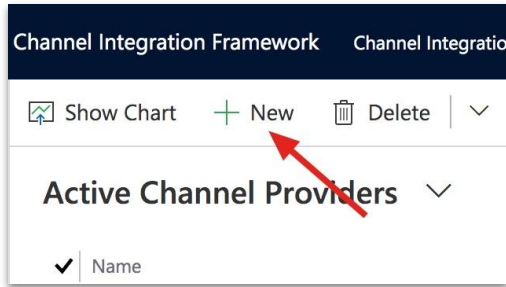
3.1. Go to Channel Integration Framework



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' configuration form. At the top, there are buttons for 'Save', 'Save & Close', '+ New', and 'Flow'. The form is titled 'New Channel Provider' and has a sub-section 'Channel Provider Configuration'. The configuration is presented as 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 configuration table, there is 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

Save Save & Close + New Flow

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
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
2 more
Enter text here

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#

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

For example. See browser address below



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 top navigation bar includes 'Show Chart', 'Edit', 'Activate', 'Deactivate', 'Delete', 'Email a Link', and 'Flow'. The 'Active Channel Providers' section is expanded, showing a table with the following data:

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

Red arrows indicate the 'Activate' button in the top bar and the 'RingCentral' entry in the table. The 'RingCentral' entry is highlighted in blue. The bottom of the screen shows a navigation bar with 'All' selected and a status bar indicating '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

The screenshot displays the Dynamics 365 user interface. The top navigation bar shows 'Dynamics 365' and 'Field Service' > 'Service' > 'Accounts'. The left sidebar contains navigation options: 'My Work', 'Dashboards', 'Scheduling' (with sub-items: Work Orders, Schedule Board, Bookings, Resource Require..., Requirement Grou..., Time Off Requests), 'Customers' (with sub-items: Accounts, Contacts), and 'Service Delivery'. The main content area is titled 'My Active Accounts' and shows a table with one record: 'Blue Jazz Inc' with phone number '6503445678'. To the right, the 'RingCentral for Dynamics v2' app is open, showing a dial pad interface with a 'To:' field and a green call button at the bottom.

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 Dynamics 365 Field Service interface. The top navigation bar shows 'Dynamics 365' and 'Field Service'. The main content area is titled 'Blue Jazz Inc Account'. Below the account name, there are tabs for 'Summary', 'Project Price Lists', and 'Details'. The 'Summary' tab is active, showing 'ACCOUNT INFORMATION' with fields for Account Name (Blue Jazz Inc), Phone (6503445678), Fax, Website, Parent Account, Ticker Symbol, and Relationship Type. A RingCentral dial pad overlay is visible on the right side of the screen, featuring a green 'Call' button and a 'To: Enter Name or Number' field. The RingCentral logo is also present in the bottom right corner of the interface.

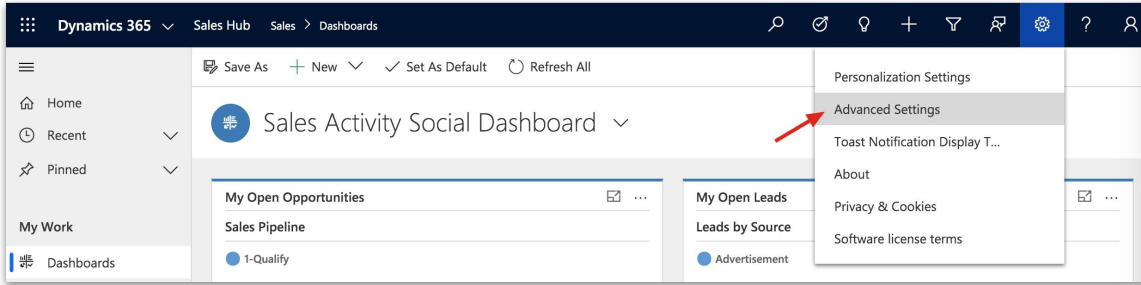
Click to Dial from Phone fields in targeted pages is now available by CIF.

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

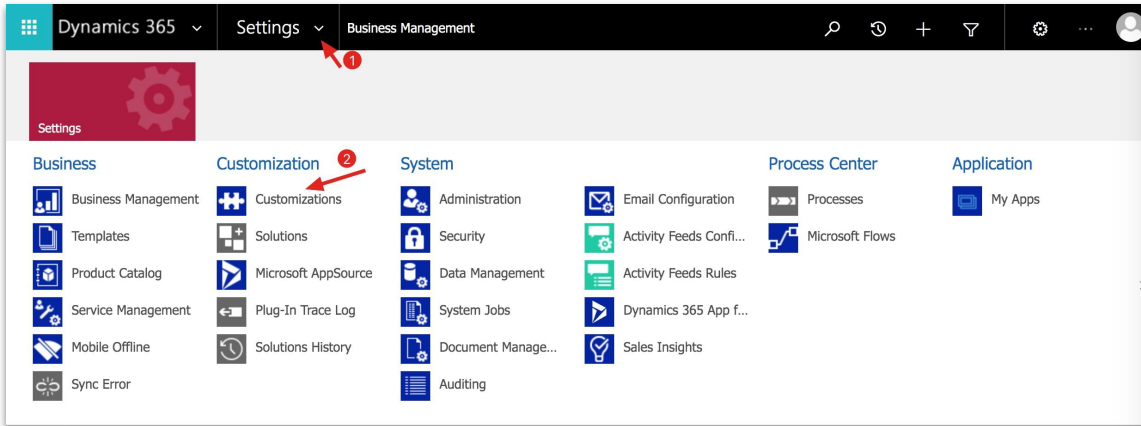
Note: it must be a phone field, and it must be configured in advance.

Step 4: Enable Click to Dial with RingCentral

Step 4.1. Go to Customizations

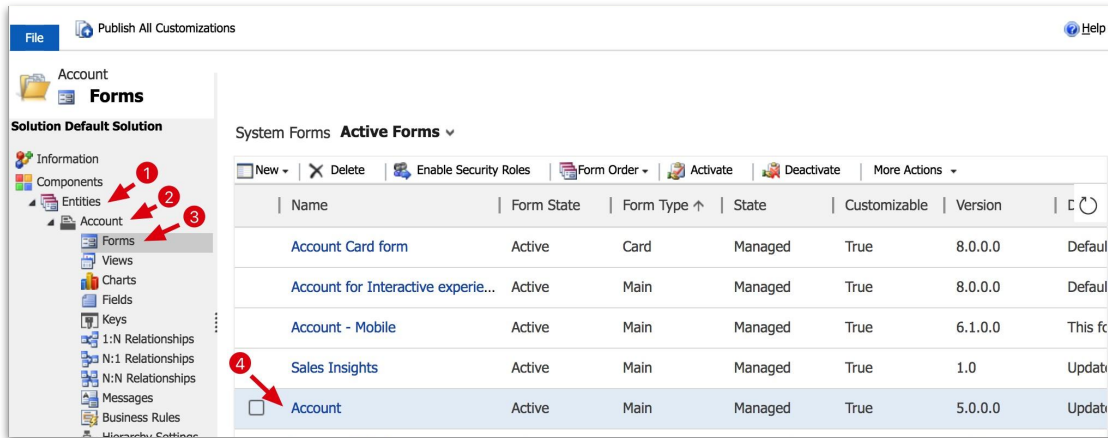
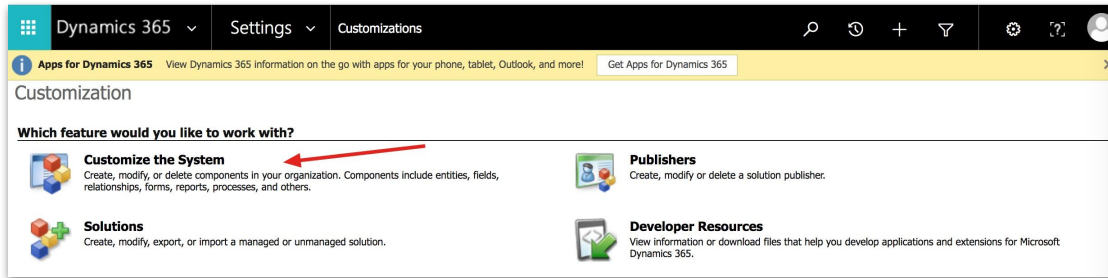


1. Click “Setting” gear icon, select “Advanced Settings” from the list.
2. Click the drop down icon next to “Settings”, and click “Customizations” item.



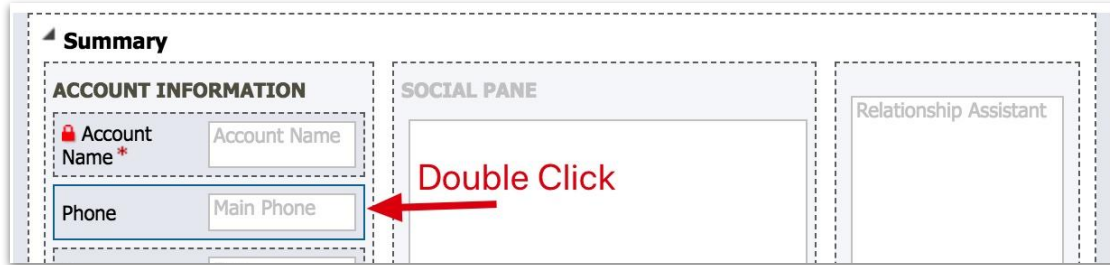
Step 4: Enable Click to Dial with RingCentral

Step 4.2. Lookup the page you want to customize

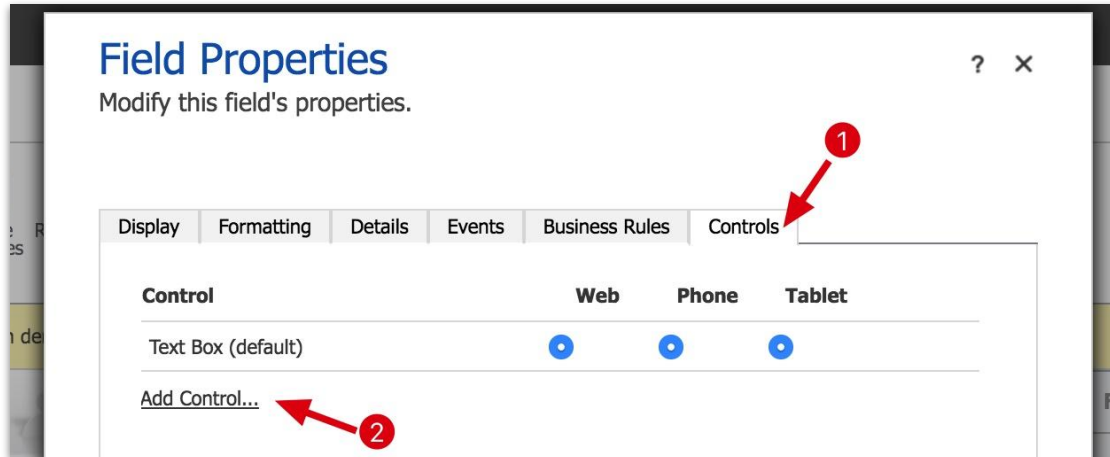


Step 4: Enable Click to Dial with RingCentral

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"/>	X

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

The screenshot shows the PowerApps interface. At the top, the 'PowerApps' header is visible. Below it, the ribbon contains 'FILE', 'HOME', and 'INSERT' tabs. The 'HOME' tab is active, showing various actions like 'Save', 'Save As', 'Save and Close', 'Publish', 'Change Properties', 'Remove', 'Undo', 'Redo', 'Header', 'Footer', 'Body', 'Navigation', 'Business Rules', 'Form Properties', 'Preview', 'Form', 'Enable Security Roles', 'Show Dependencies', 'Managed Properties', and 'Merge Forms'. A yellow banner below the ribbon contains an information icon and the text: '1 m header, now default to high density to display more data. Use the new form designer to edit header density. [Learn more](#)'. Below the banner, the main form area is visible, showing 'Solution: Default Solution' and 'Form: Account'. The form has several sections: 'ACCOUNT INFORMATION' with fields for 'Account Name', 'Phone', 'Fax', 'Website', 'Parent Account', 'Ticker Symbol', and 'Relationship Type'; 'SOCIAL PANE'; and 'Relationship Assistant'. A 'Field Explorer' pane is visible on the right side of the form.

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

Business Phone	8885287464	
To		
Phone	6503445678	

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

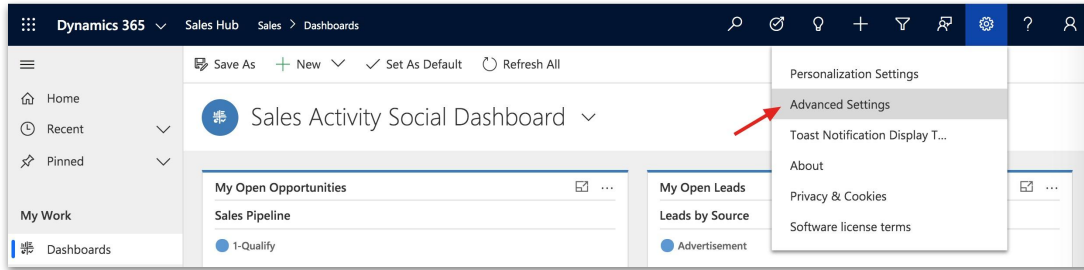
4

Configure Click to
Dial in Dynamics

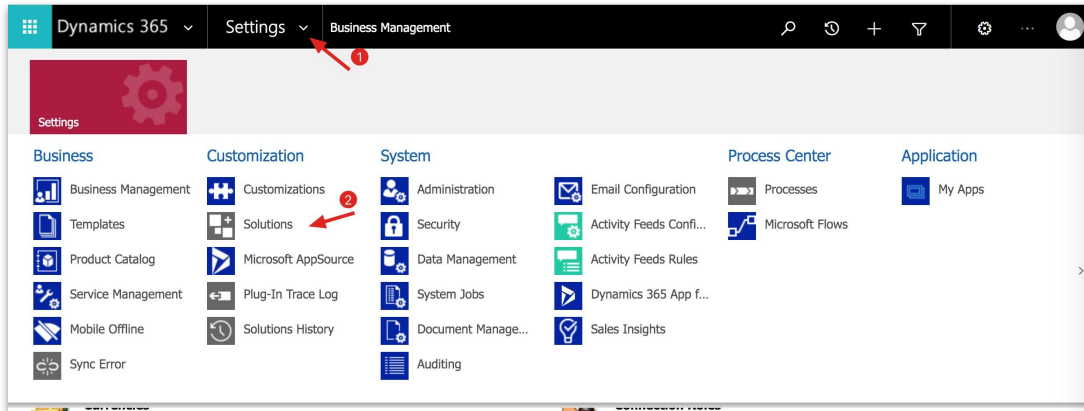
The only difference between install with package and from AppSource, is that in Step 2, administrator needs to import the app from the package manually.

Import RC for Dynamics

1. Go to Dynamics Solutions view

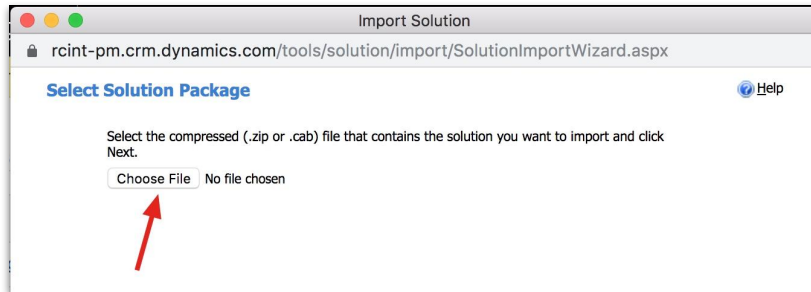
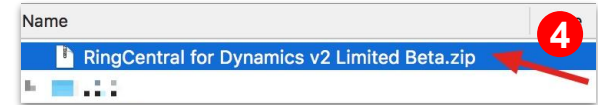
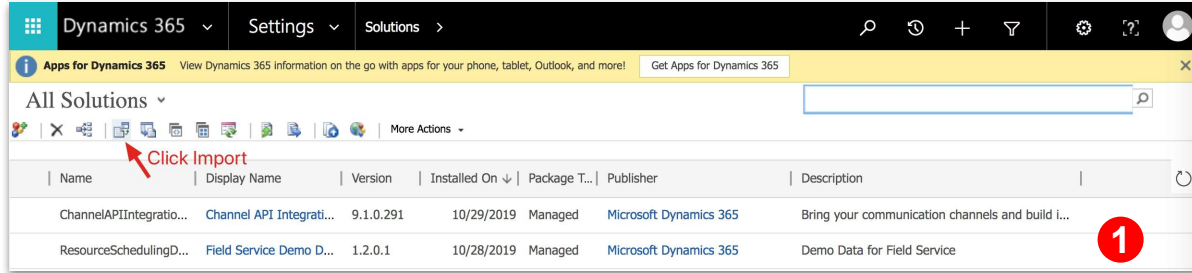


1. Click “Setting” -> “Advanced Settings.”
2. Advance Settings tab will be opened. Click the dropdown icon in “Settings”, and click “Solutions.”



Import RC for Dynamics

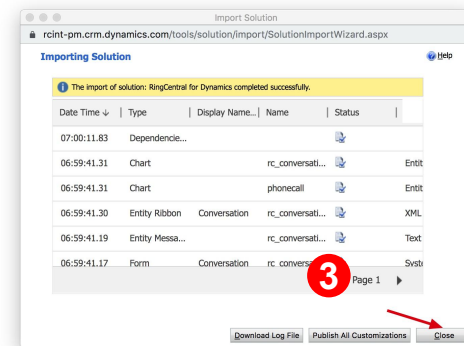
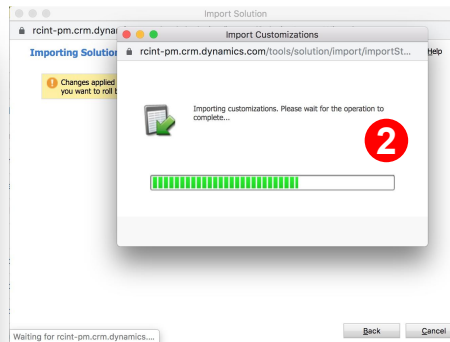
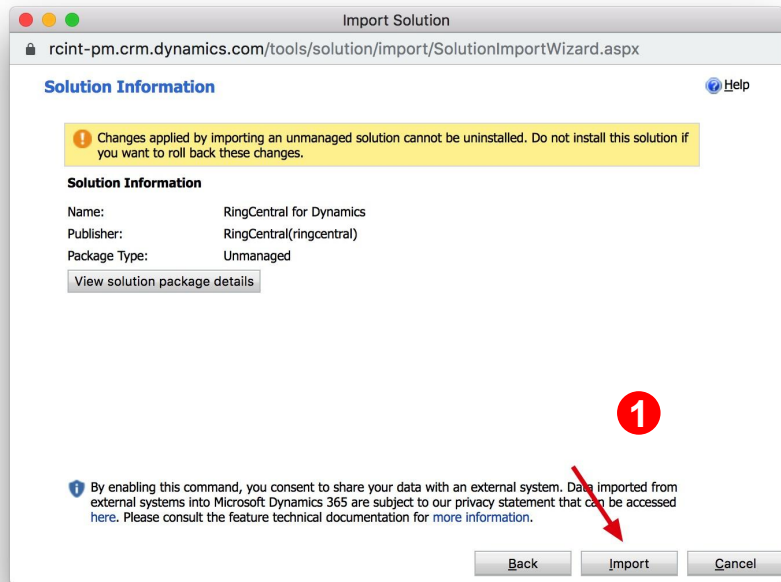
2. Import the RingCentral Solution package 1/2



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

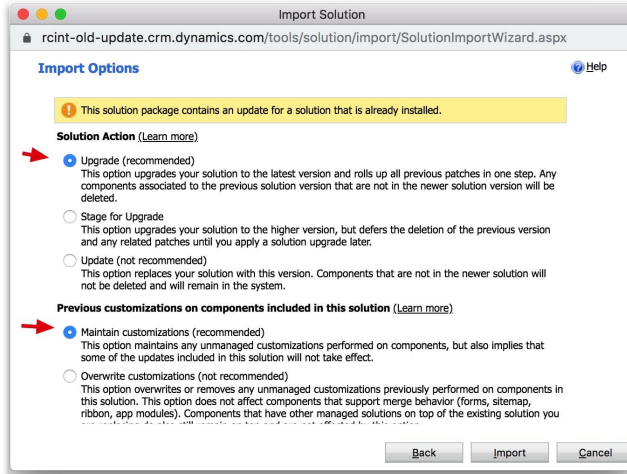
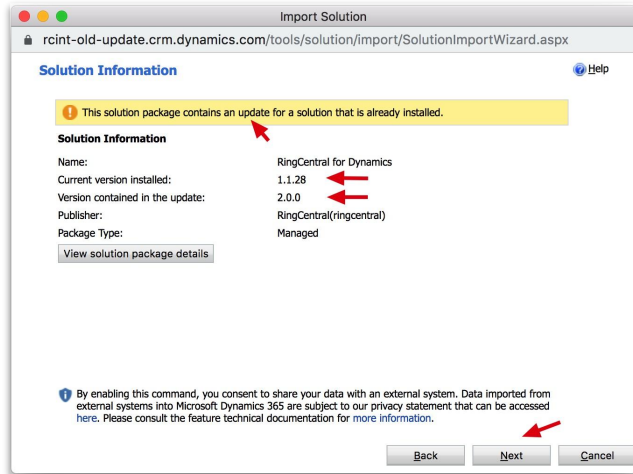
The screenshot shows the Microsoft Dynamics 365 interface. At the top, there is a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a yellow notification banner that reads 'You need to assign security roles to new users'. The main content area displays a list of installed apps. A red arrow points to the RingCentral app icon in the 'More Actions' menu. The RingCentral app window is open, showing a 'Sign In' button. The app list table is as follows:

Version	Installed On	Package T...	Publisher	Description
1.1.28	10/29/2019	Managed	RingCentral	
1.2.0.1	10/28/2019	Managed	Microsoft Dynamics	Demo Data for Field Service
3.0.0.3	10/28/2019	Managed	Microsoft Dynamics	Field and Project Service Demo Data Package
9.1	10/28/2019	Managed	Microsoft Dynamics 365	
2.2.1.1	10/28/2019	Managed	Dynamics 365	Solution to enhance out of the box Microsoft Dy...
8.8.6.300	10/28/2019	Managed	Microsoft Dynamics	Try Microsoft Dynamics 365 Field Service, a solu...
1.0.0.238	10/28/2019	Managed	Microsoft Dynamics	Configures Field Service for geofencing, generati...
1.0.1.18	10/28/2019	Managed	Microsoft Dynamics	Define Geofences and the records that should b...
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 health...

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.

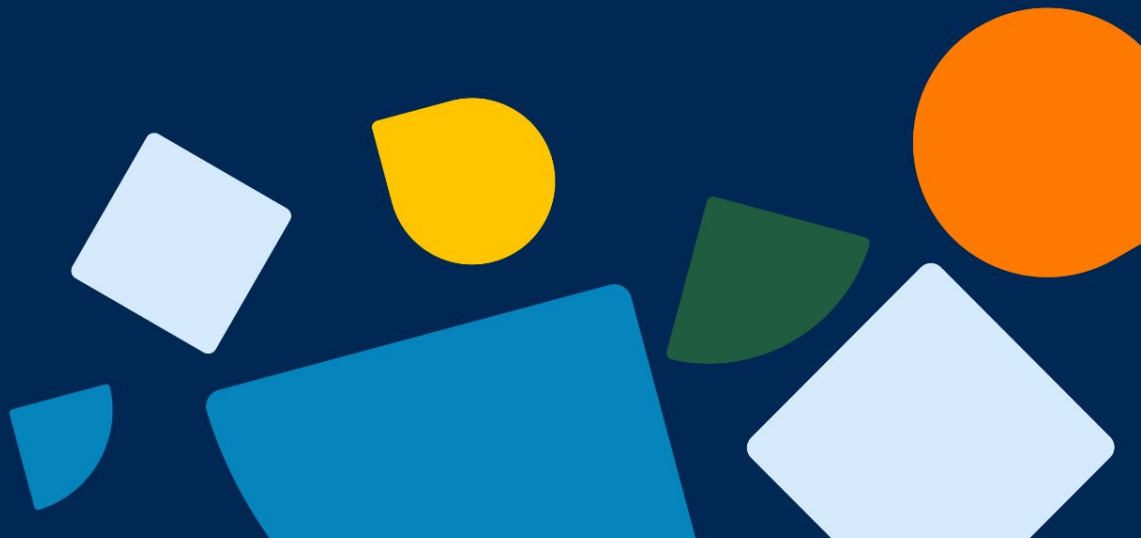
Installing from Old

The difference

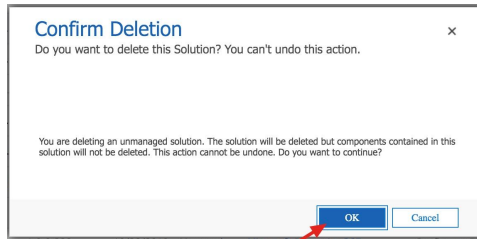
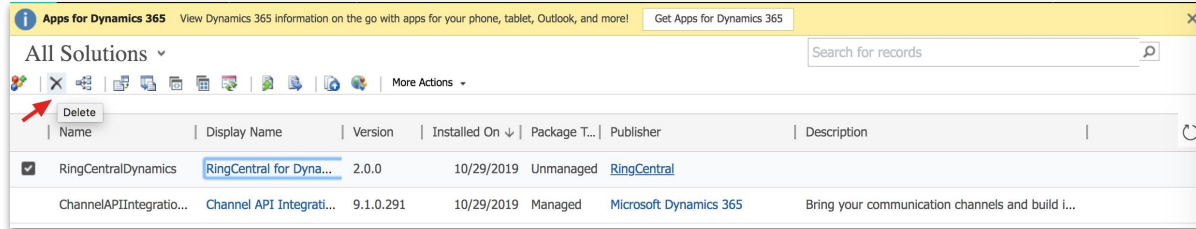


1. Follow the same steps as installing from new detailed in Step 1.
2. When you reach Step 2.2, you will see different popup info illustrated here.
3. Confirm and click Next and Import.
4. Remaining steps are the same as install from new scenario.

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 displays the Dynamics 365 interface for 'Channel Providers'. The top navigation bar includes 'Dynamics 365', 'Channel Integration Framework', and 'Channel Providers'. The main area shows a table of 'Active Channel Providers' with columns for Name, Label, and Created On. A record for 'RingCentral' is selected, indicated by a blue highlight and a red '1' in a circle. The 'Delete' button in the top toolbar is highlighted with a red '2' in a circle. 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.

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.

