

Setting up Microsoft Dynamics for CRM integration Engage Voice Admin Guide

For more information, visit our [support site](#).

RingCentral[®]

Setting up Microsoft Dynamics for CRM integration

After you've connected your phone system and Customer Relationship Management (CRM) to the Engage CRM integration portal, you may proceed to configuring your Microsoft Dynamics account. To set up your Microsoft Dynamics account and connect it with Engage CRM integration, you'll need the following requirements:

- **Dynamics Hostname:** Hostname of your Microsoft Dynamics instance.
- **Dynamics Service Account Username:** The username for the dedicated Engage CRM integration service account. For example, the API user.
- **Dynamics Service Account Password:** The password for the dedicated Engage CRM integration service account.

Installing Channel Integration Framework

Setting up is fast and easy. You need to have admin access within Microsoft Dynamics. Make sure you have Channel Integration Framework installed in your application.

If you're installing Channel Integration Framework for the first time, follow these steps:

1. Log in to Microsoft Dynamics using an admin account.
2. Click on the **Dynamics 365** down arrow in the upper left corner.
3. Select *Get more apps* at the bottom of the dropdown.
4. In the **AppSource** modal window, use the search bar at the top left to search for 'Channel Integration Framework.'
5. In the search results, look for Channel Integration Framework and click on **Get it now** in its tile.
6. Click **Continue** to install it.

Embedding within Channel Integration Framework

Once Channel Integration Framework is installed, you may proceed with embedding. Follow these steps:

1. Click on **Dynamics 365** down arrow.
2. Select *Channel Integration Framework*.
3. On the Channel Integration Framework page, click on **+New**.
4. Enter the following information in their respective fields exactly as shown:
 - **Name:** Tenfold Embedded UI
 - **Label:** RingCentral Engage
 - **Channel URL:** `https://app-engage.tenfold.com/dynamics.html?base=<<YOUR HOSTNAME INSTANCE URL>>`

- For example:
https://app-engage.tenfold.com/dynamics.html?base=https://yourcompanyname.dynamics.com
 - You must include the whole URL, including the 'https://' after 'base=' for the record popup to work properly in the integration app.
 - **Enable Outbound Communication:** Yes
 - **Channel order:** 0
 - **API Version:** 1.0
 - **Trusted Domain:** (Leave blank)
 - **Custom Parameters:** width:283
5. Select which Unified interface App the embedded UI is to be added to.
 6. Select the roles that are going to use the Engage embedded UI.
 7. Click **Save & Close** at the bottom right.

After setting up Microsoft Dynamics, you should be able to use the Engage CRM integration app.

Integrating Microsoft Dynamics to Engage via the Engage CRM integration portal

If the onboarding wizard is unavailable to you, you can still establish the initial connection from the Engage portal to Microsoft Dynamics. Follow these steps to do so:

1. Go to engage.tenfold.com and log in using your credentials.
2. Select **Company settings** in the top navigation bar.
3. Select **CRM** in the sub-navigation bar that will appear under the top nav bar.
4. Select your *Microsoft Dynamics* as your CRM, listed under the first dropdown menu.
5. Select *Credentials* or *OAuth* as your preferred authentication method.
6. Fill out the authentication method configuration settings.
7. Click **Save**.

Upon clicking save, if the information provided is correct, Engage CRM integration will test the connection and present a success message. If you followed the steps above, you can read 'Configuring your Agent Status' in the Engage CRM integration Admin guide.

Authentication method configuration settings

The authentication method configuration settings you need to fill out when the onboarding wizard is unavailable can be found below.

- **Credentials:** Lets you use your administrator username and password for authentication
 - **Hostname:** Your organization's hostname, or the URL that connects your organization to Microsoft Dynamics (e.g. https://yourcompanyname.dynamics.com).

- **Service Account Username:** Your service account username with admin access.
- **Service Account Password:** Your password for the service account with admin access.
- **OAuth:**
 - **Hostname:** Your organization's hostname, or the URL that connects your organization to Microsoft Dynamics (e.g. <https://yourcompanyname.dynamics.com>).
 - *Advanced Options*
 - **OAuth Client ID:** The client ID for your organization.
 - **OAuth Client Secret:** The client secret for your OAuth.
 - **OAuth tenant ID:** The tenant ID for your OAuth.