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Gplus Adapter for Microsoft Dynamics 365 Administrator's Guide

[How to configure the Workflow Designer](#)

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Steps to configure the Workflow Designer.

Creating a new unmanaged solution

Important

This section and all information related to the **Workflow Designer** only apply to Microsoft Dynamics 365 with **Channel Integration Framework (CIF) version 1.0**.

Unlike the Workflow Designer installation, which is deployed with the managed solution, to enable the Gplus Adapter for Microsoft Dynamics 365 to work with the Workflow Designer, you have to create a new **unmanaged solution** based on the following JavaScript file:

- `_workflows.js`

Important

is an example of how the file is named. Once you generate the unmanaged solution, your organization name will take the place of .

Follow this procedure.

Go in **Settings** and select **Solutions** from the Customization menu.

There are no Opportunities in this view to create a Sales Pipeline chart.

Leads by Source Top Customers Top Opportunities

Click **New** to create a new solution.

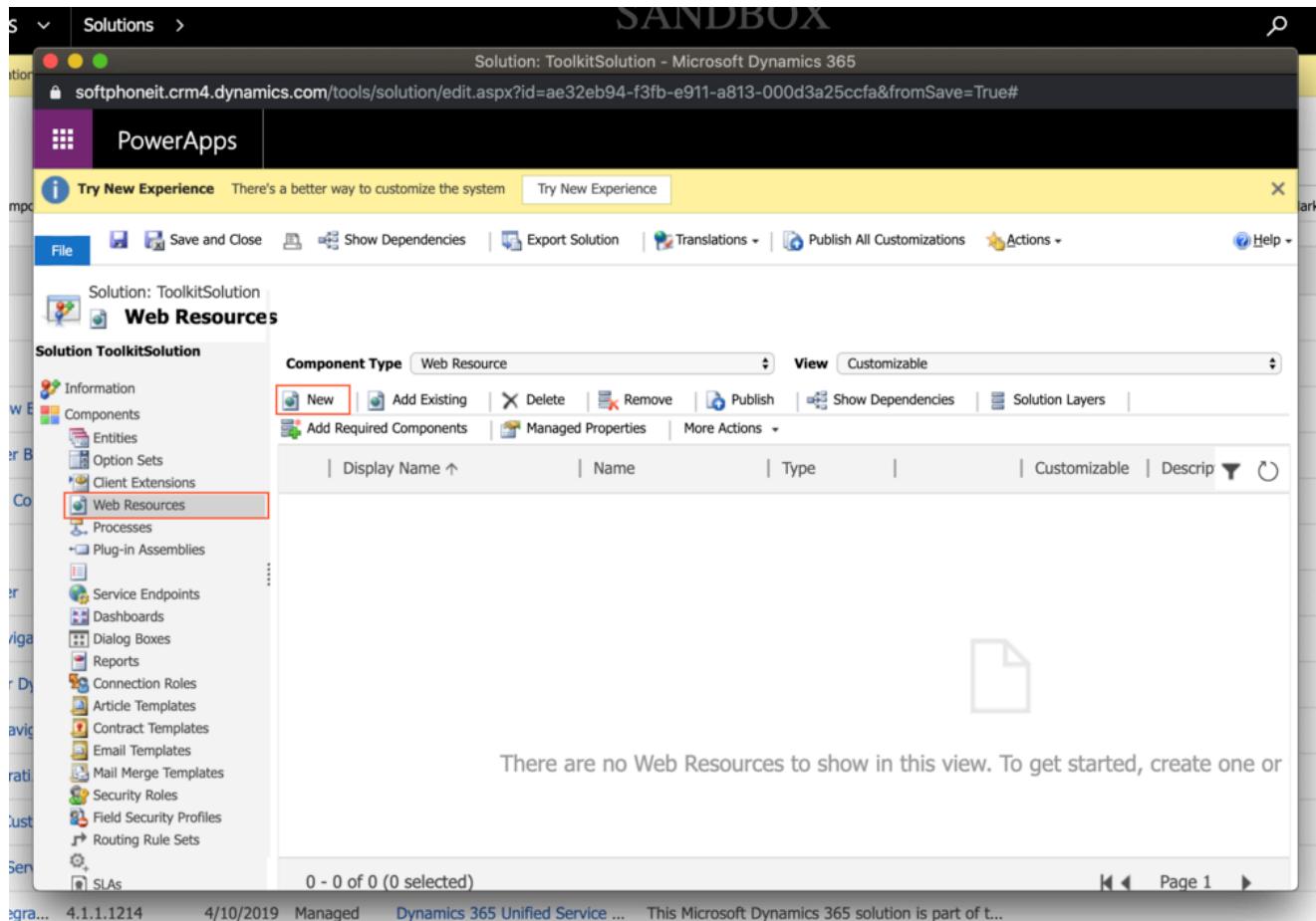
Name	Display Name	Version	Installed On	Publisher	Description
TestGuide	TestGuide	1.0	10/31/2019	Unmanaged	SoftPhone
SoftphoneWorkflowEd...	Softphone Workflow E...	1.0.0.0	8/21/2019	Unmanaged	SoftPhone
msdyn_PowerAppsCh...	PowerApps Checker B...	1.1.0.10	7/5/2019	Managed	Dynamics 365
PureEngageCloudCon...	PureEngage Cloud Co...	9.0.0.0	7/3/2019	Unmanaged	SoftPhone
Test	Test	1.0	5/8/2019	Unmanaged	SoftPhone
msdyn_PowerAppsCh...	PowerApps Checker	1.1.0.10	5/4/2019	Managed	Dynamics 365
msdyn_LinkedInSales...	LinkedIn Sales Naviga...	3.0.1.0260	4/20/2019	Managed	Dynamics 365
LinkedIn	LinkedIn - Sales Navig...	3.0.0.0630	4/20/2019	Managed	LinkedIn
ChannelAPIIntegratio...	Channel API Integrati...	9.1.0.153	4/15/2019	Managed	Dynamics 365

Fill out the required fields of the new solution:

- **Display Name:** your choice
- **Name:** you can employ the same name provided in the Display Name field
- **Publisher:** search for the name of your organization or agent group
- **Version:** your choice

Click **Save**.

Go to **Web Resources** and click **New**.



Fill out the required fields of the new web resource:

- **Name:** _workflows.js
- **Type:** select **Script (JScript)** from the drop-down menu

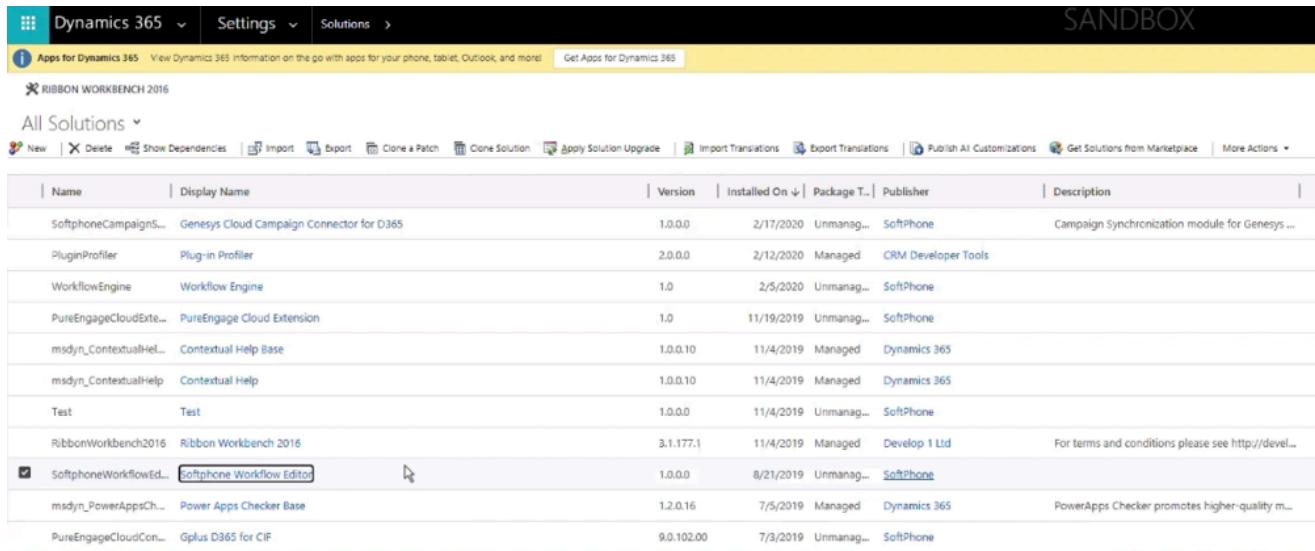
Click **Text Editor** and just type a space.

Click **Save** and then **Publish** to finalize the procedure.

Configuring the Workflow Editor App

To finalize the configuration, follow these steps:

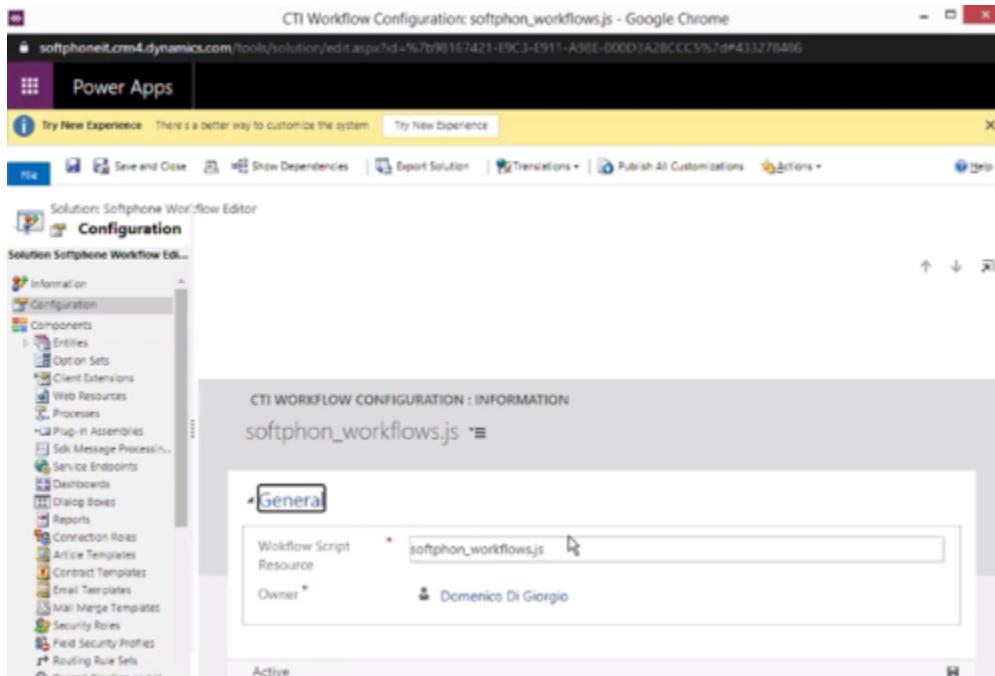
Go back to **Solutions** and click the imported **Softphone Workflow Editor**: a new configuration window appears.



The screenshot shows the Microsoft Dynamics 365 Solutions list page. The 'Solutions' tab is selected in the top navigation bar. The 'Sandbox' environment is indicated in the top right. The list table has columns for Name, Display Name, Version, Installed On, Package Type, Publisher, and Description. One row is selected: 'SoftphoneWorkflowEd...' (Display Name), which is highlighted with a yellow background. The 'Description' column for this row shows a link to the developer's terms and conditions.

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
SoftphoneCampaigns...	Genesys Cloud Campaign Connector for D365	1.0.0.0	2/17/2020	Unmanaged	SoftPhone	Campaign Synchronization module for Genesys ...
PluginProfiler	Plug-in Profiler	2.0.0.0	2/12/2020	Managed	CRM Developer Tools	
WorkflowEngine	Workflow Engine	1.0	2/5/2020	Unmanaged	SoftPhone	
PureEngageCloudExt...	PureEngage Cloud Extension	1.0	11/19/2019	Unmanaged	SoftPhone	
msdyn_ContextualHel...	Contextual Help Base	1.0.0.10	11/4/2019	Managed	Dynamics 365	
msdyn_ContextualHelp	Contextual Help	1.0.0.10	11/4/2019	Managed	Dynamics 365	
Test	Test	1.0.0.0	11/4/2019	Unmanaged	SoftPhone	
RibbonWorkbench2016	Ribbon Workbench 2016	3.1.177.1	11/4/2019	Managed	Develop 1 Ltd	For terms and conditions please see http://devel...
<input checked="" type="checkbox"/> SoftphoneWorkflowEd...	Softphone Workflow Editor	1.0.0.0	8/21/2019	Unmanaged	SoftPhone	
msdyn_PowerAppsCh...	Power Apps Checker Base	1.2.0.16	7/5/2019	Managed	Dynamics 365	PowerApps Checker promotes higher-quality m...
PureEngageCloudCon...	Gplus D365 for CIF	9.0.102.00	7/3/2019	Unmanaged	SoftPhone	

Insert your customized **_workflows.js** as the Workflow Script Resource.



The screenshot shows the Microsoft Dynamics 365 Configuration page for the 'Softphone Workflow Editor' solution. The left sidebar shows a tree structure with 'Information', 'Configuration', 'Components', 'Entities', 'Option Sets', 'Client Extensions', 'Web Resources', 'Processes', 'Plug-in Assemblies', 'Sail Message Processing', 'Service Endpoints', 'Dashboards', 'Dialog Boxes', 'Reports', 'Connection Roles', 'Article Templates', 'Contract Templates', 'Email Templates', 'Mail Merge Templates', 'Security Roles', 'Field Security Profiles', 'Routing Rule Sets', and 'Banner Creation and UI'. The 'Configuration' node is selected. The main content area displays 'CTI WORKFLOW CONFIGURATION : INFORMATION' for 'softphon_workflows.js'. The 'General' tab is selected, showing the 'Workflow Script Resource' field set to 'softphon_workflows.js' and the 'Owner' field set to 'Domenico Di Giorgio'. The 'Active' checkbox is checked.

Open the CIF application by clicking the Microsoft Dynamics 365 **list menu** and selecting **Channel**

Integration Framework.

Select **WWE** and make sure that its parameters are set as follows:

- **Name:** WWE
- **Label:** Gplus Adapter for MS Dynamics 365
- **Channel URL:** "https://webresources/softphon_index_wwe.html"
- **Enable Outbound Communication:** Yes
- **Channel Order:** 5
- **API Version:** 1.0
- **Trusted Domain:**
- **Custom Parameters:** {"CustomFlow": false, "CustomPrefix": "softphon", "MakeCall": true, "InstanceURL": https://, "logo": "/webresources/softphon_microsoft.png", "Width": 450, "Language": "en-US", "UseWorkflowEngine": true, "CustomWorkflowMakeCall": true}

Important

When filling out the **Channel URL** field, you have to replace with your own Microsoft Dynamics 365 Domain.

Important

When filling out the **Custom Parameters** field, you have to replace with your own Genesys URL.

Important

When filling out the **Custom Parameters** field, you have to add "UseWorkflowEngine" and set it to "true" for the Workflow Designer to effectively run designed workflows in the case of any associated Events. In the case of unassociated Events, the Adapter will perform as usual.

Important

When filling out the **Custom Parameters** field, you have to add "CustomWorkflowMakeCall" and set it to "true" to activate the **onBeforeOutboundCallStart** event. In the case this parameter is missing or set to false, the Event will not be generated.

Continue to [How to use the Workflow Designer](#) to learn about its functioning.