



# Telephone Integration for Microsoft CRM 4.0 (TI)

Version 4.0

## **Users Guide**

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## 1 Introduction

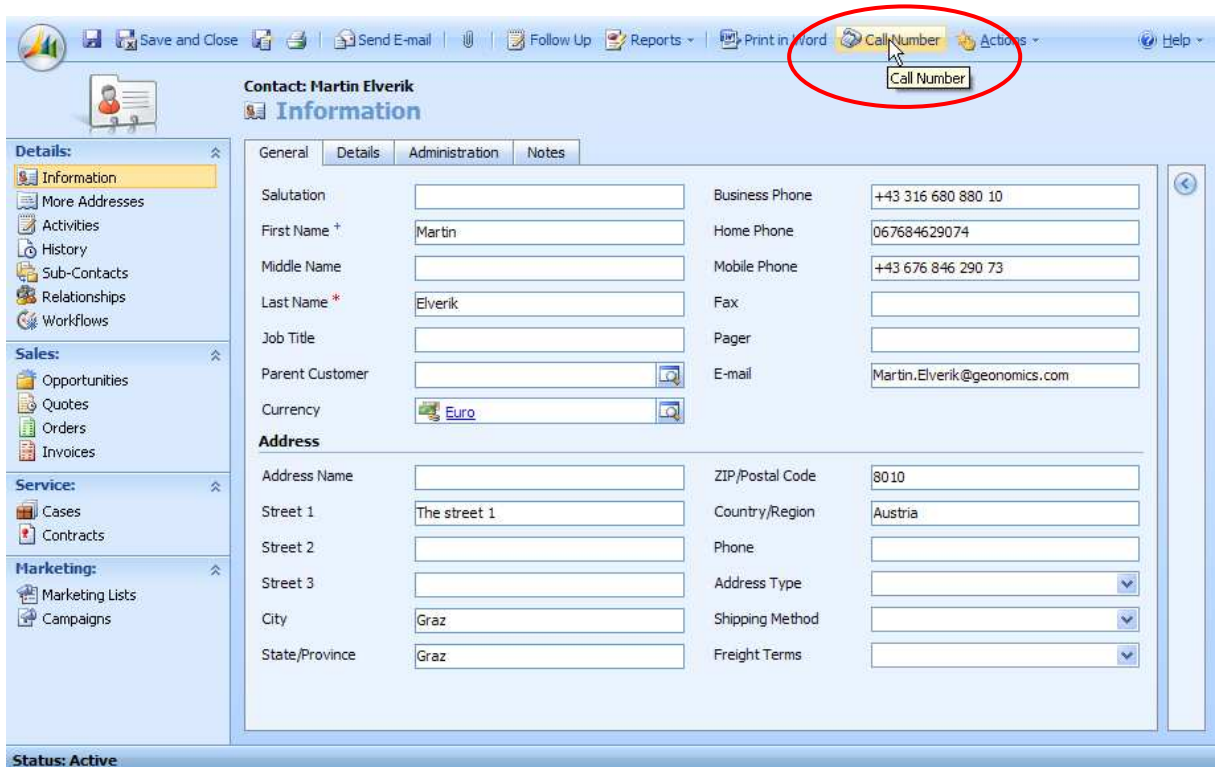
Telephone Integration for Microsoft CRM 4.0 (**TI**) is a CRM Add On which enables you to connect your Telephone System (CTI) to Microsoft CRM 4.0. It works in both directions (incoming and outgoing) and is easy to handle.

On Incoming calls it shows you the name (if it is findable in CRM) and on lifting the handset the contact/account opens. Also a incoming phone activity will be created.

If you want to call someone the Telephone Integration system dials the number for you and also creates an outgoing phone activity.

## 2 Outgoing calls

Go to your Account or Contact and open it.



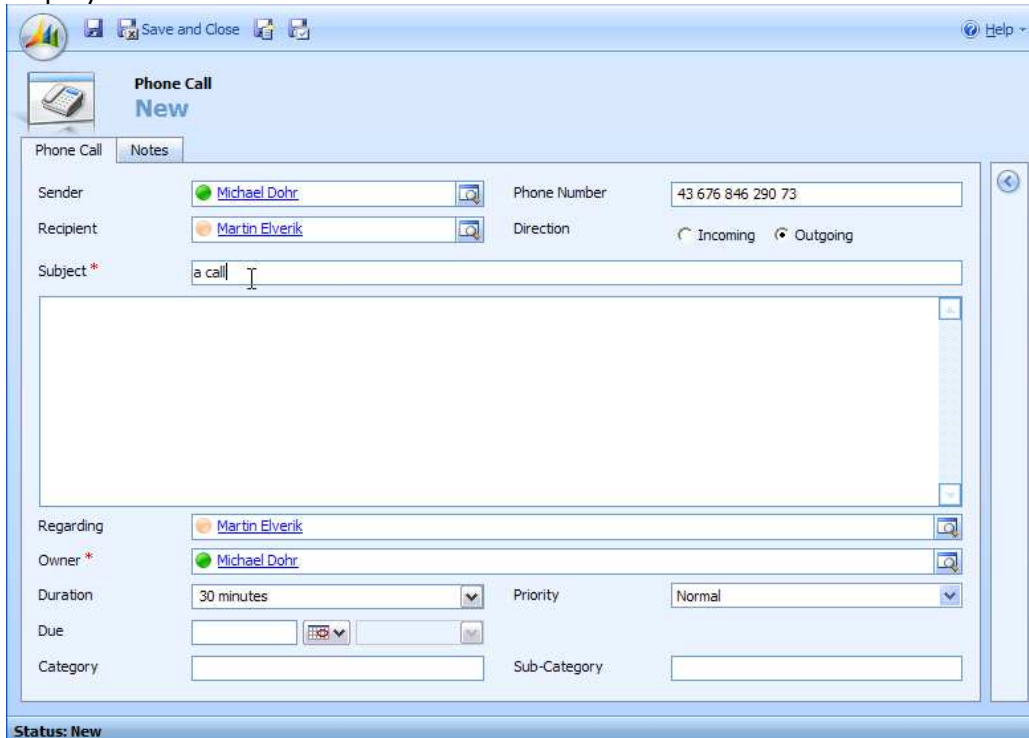
Then just click on [Call Number]

The new Web Page Dialog with all available numbers opens.



Now select the Number you want to call and then press [OK] or activate the call by Double-Click.  
 During your phone is now creating the call the activity will be open.

If the Telephone Integration is started, the outbound call will be noticed and displayed.



### 3 Incoming Call

If **TI** is started, you can see a little telephone Icon in the Context-Menu.



#### 3.1 Balloon Element (Complex)

The balloon is the central Element on the client side.


This balloon displays all available call Information (see → Call Details).

The 5 Sections identified in the image to the right are


- (1) Call Area
- (2) Balloon functions
- (3) TAPI functions
- (4) CRM functions
- (5) Call function


1.) The "Call Area" is described in  
→ Call Details.


2.) The Balloon functions are:

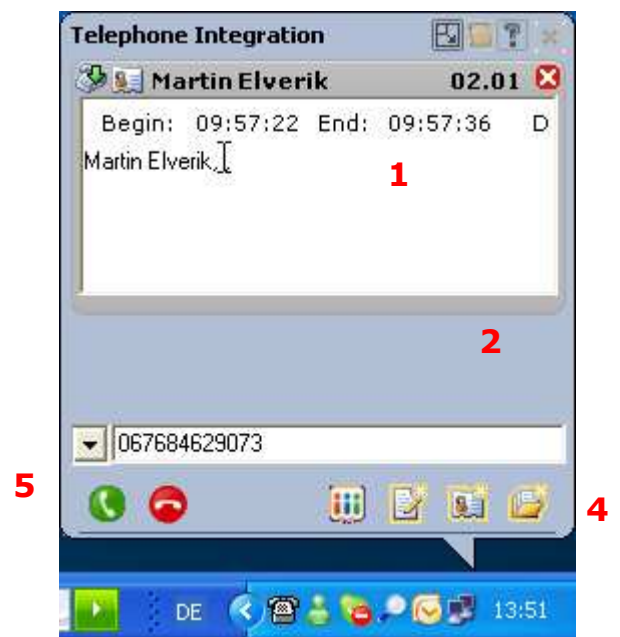
 Enable custom sizing

On clicking this icon, the window layout slightly changes, offering the ability to resize as desired. On hitting this icon again, the feature is disabled again and the selected size is stored. The balloon will stay this size further on (to change by parameters see → Setup).

 Show History

 Show Help

 Hide Balloon window



3

### 3.) The TAPI functions are:



Pick up Receiver / Accept Call



Disconnect

### 4.) CRM functions:



This button opens the CRM entity assigned to the phonecall. If no entity is specified due to multiple targets (See → Call Details), this opens the entity-selection dialog.



Creates a new activity for the entity assigned to the call.



Create new contact based on the phone number



Create new account based on the phone number

### 5.) Call function

Enter a telephone number into this area and press the TAPI Function "Pick up receiver". This will initiate a call with the given number. Selecting an inbound call places the caller number into the call function field, replacing anything in it.



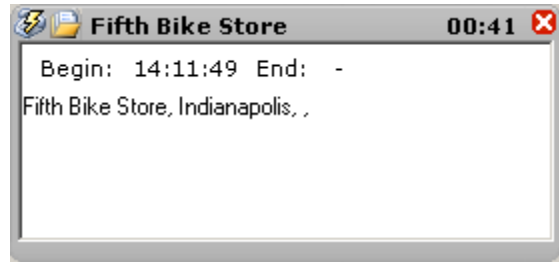
Clicking on this area hides the call function field. The Icon changes to:

Clicking on this area shows the call function field.

### 3.1.1 Call Details

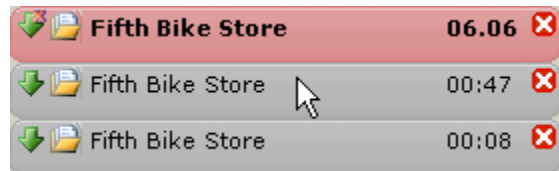
The call area contains the single call-elements either received or initiated by TelephoneIntegration for CRM 4.0.

The basic call item has 2 Icons on the left side, indicating item lookup-state and call state, an information area showing begin and end-date for the call, and as soon as connected, the top right section shows the call duration. The detail area shows the selected display fields of the CRM entity as defined on the server.

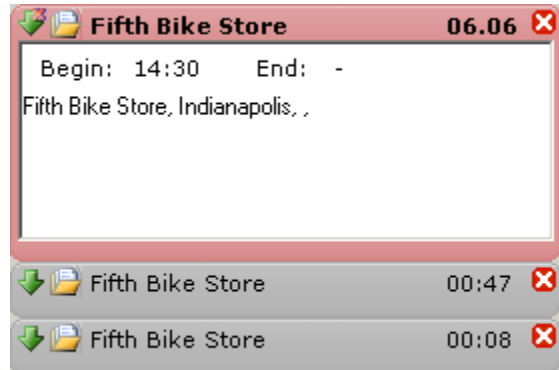


Color coding indicates missed incoming calls.









Example for a missed call. Note the call time is being replaced by the date of the call.








Expanding the call shows the time, when call has happened



**Following call state icons are possible:**

-  Outgoing call in Progress, not connected
-  Incoming call awaiting to be picked up
-  Call Connected
-  Finished incoming call
-  Missed incoming call. The color of the call element also changes on this occasion
-  Finished outbound call
-  Finished outbound call, that was not answered
-  Call has been redirected to you or by you

**Following CRM state icons are possible:**

-  CRM Lookup initiated, but not finished
-  The telephone number search returned more than one entity (See multiple targets)
-  The CRM lookup has returned an account entity
-  The CRM lookup has returned a lead entity
-  The CRM lookup has returned any other entity

### 3.1.2 Multiple targets

If the CRM-search for a number returns multiple targets, a detail window is displayed on lifting the handle, showing all possible choices.

If a call with multiple targets has been missed, pressing the "Open in CRM" – button (see → CRM functions ) shows the detail selection instead.



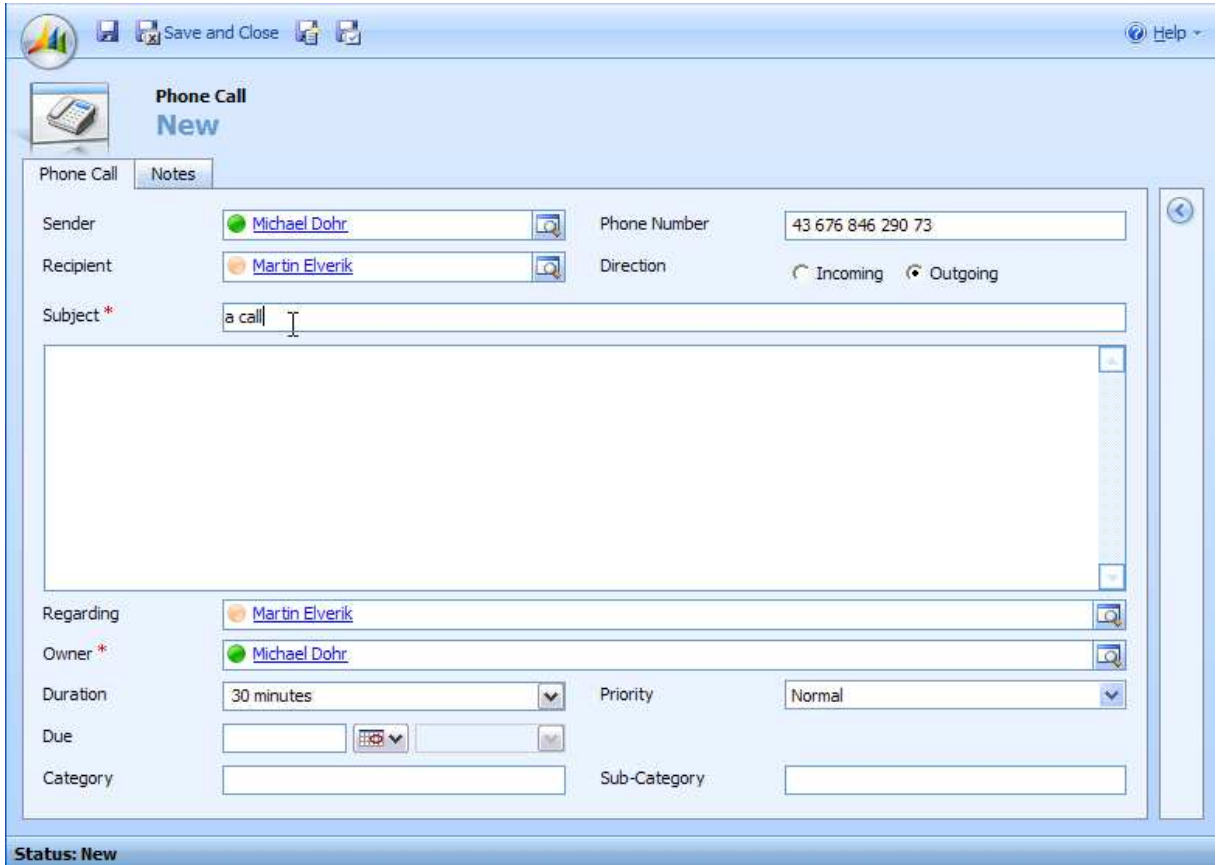
The detail window shows all possible entries with an icon according to their entity-type.

By pressing the "to balloon" button the selected entity is assigned to the call. You can also do this by double clicking on the desired entity.

By entering a value into the Filter field, the entities are filtered for this value. The Filter works instantaneously. To remove, just clear the textbox.

As soon as an entity is selected for the call (either by finding only one match in CRM, or by selecting one target from the multiple targets window, some CRM-Windows might be opened, depending on your settings.

To enable this function, "allow unsigned ActiveX" option must be activated inside Internet Explorer.



The screenshot shows a web-based form for creating a new phone call. The form is titled "Phone Call New" and has two tabs: "Phone Call" and "Notes". The "Phone Call" tab is active. The form contains the following fields and values:

- Sender: Michael Dohr
- Recipient: Martin Elverik
- Subject \*: a call
- Phone Number: 43 676 846 290 73
- Direction:  Incoming  Outgoing
- Regarding: Martin Elverik
- Owner \*: Michael Dohr
- Duration: 30 minutes
- Priority: Normal
- Due: (empty)
- Category: (empty)
- Sub-Category: (empty)

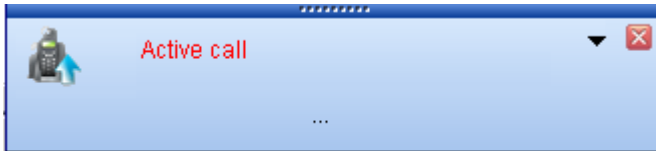
The status at the bottom of the form is "Status: New".

Contact/Account might be opened.

To define the desired behaviour see → 4. Configuration

### 3.2 Balloon Element (Simple)

In the simple view, the CTI offers an alert-popup similar to Microsoft™ Outlook.

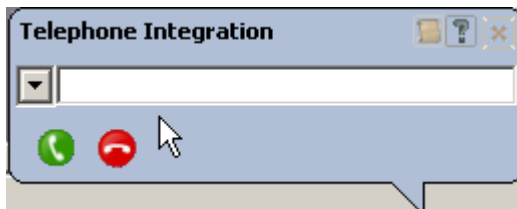


The information on the popup will be updated with information being provided by the TAPI Driver and, if existing, the CRM contact information.



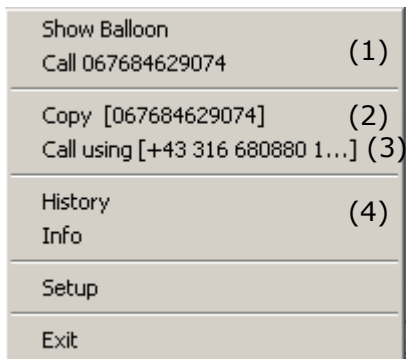
The telephone symbol on the left side will indicate the call direction of the call activity that has been detected on the telephone.

With clicking on the CRM Icon or the red printed information (the caller name in this case) CTI will popup the entity.



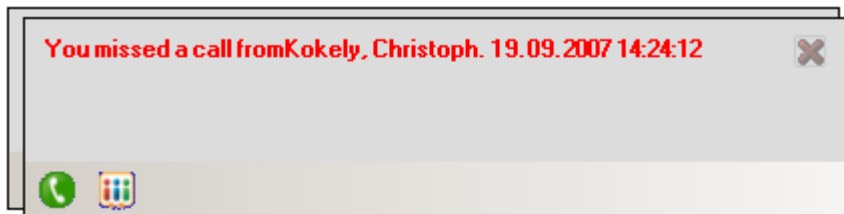
The callout control can still be reached via a double click on the CTI component or with the Show Balloon command.

The simple display will also offer an adjusted contextmenu with some new features.



1. Either repeat or callback the last used number
2. Copy the last number to the clipboard
3. Use the content of the Clipboard to call a number
4. Open the History

Missed calls will be displayed as notifications on your screen.



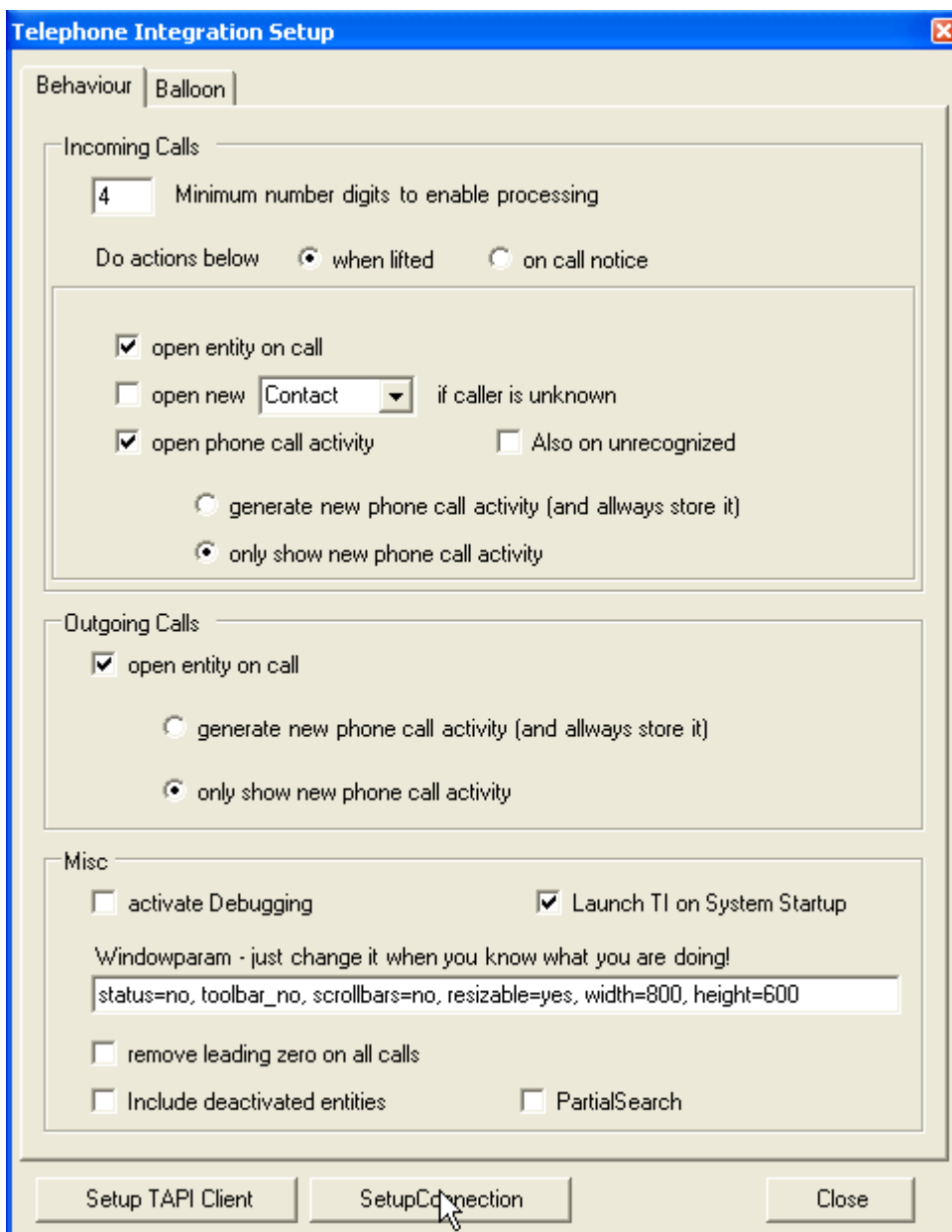
You can either close the missed call notification by clicking the red cross or call back using the receiver symbol on the notification or open the CRM-entity by clicking on the CRM logo on the notification.

## 4 Configuration

To change the configuration start *Telephone Integration Setup*.



Click the right mouse button on the Icon in the Context-Menu and select Setup.


 A screenshot of the 'Telephone Integration Setup' dialog box. The dialog has a title bar with 'Telephone Integration Setup' and a close button. It contains three main sections: 'Behaviour', 'Balloon', and 'Misc'.
 

- Behaviour**:
  - Incoming Calls**:
    - Minimum number digits to enable processing: 4
    - Do actions below:  when lifted,  on call notice
    - open entity on call
    - open new **Contact** if caller is unknown
    - open phone call activity  Also on unrecognized
    - generate new phone call activity (and allways store it)
    - only show new phone call activity
  - Outgoing Calls**:
    - open entity on call
    - generate new phone call activity (and allways store it)
    - only show new phone call activity
- Misc**:
  - activate Debugging  Launch TI on System Startup
  - Windowparam - just change it when you know what you are doing!
  - remove leading zero on all calls
  - Include deactivated entities  PartialSearch

 At the bottom, there are three buttons: 'Setup TAPI Client', 'Setup Connection', and 'Close'.

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**INCOMING CALLS:****General:**

**Minimum number digits to enable processing:** Defines the minimum number length, which have to be hit to enable call processing. Calls that have less than the desired amount of digits will not be checked in CRM for caller-information.

**When lifting receiver:**

**open Contact/Account on call:** if you are called and you lift the handset **TI** will open the contact/account in CRM (if it was found).

**open phone call activity:** if you are called and you lift the handset **TI** will create a Phone Call Activity...

- **generate new phone call activity (and always store it): stores it** and opens it for you.
- **only show phone call activity:** generates a new phone call activity without storing

**OUTGOING CALLS:**

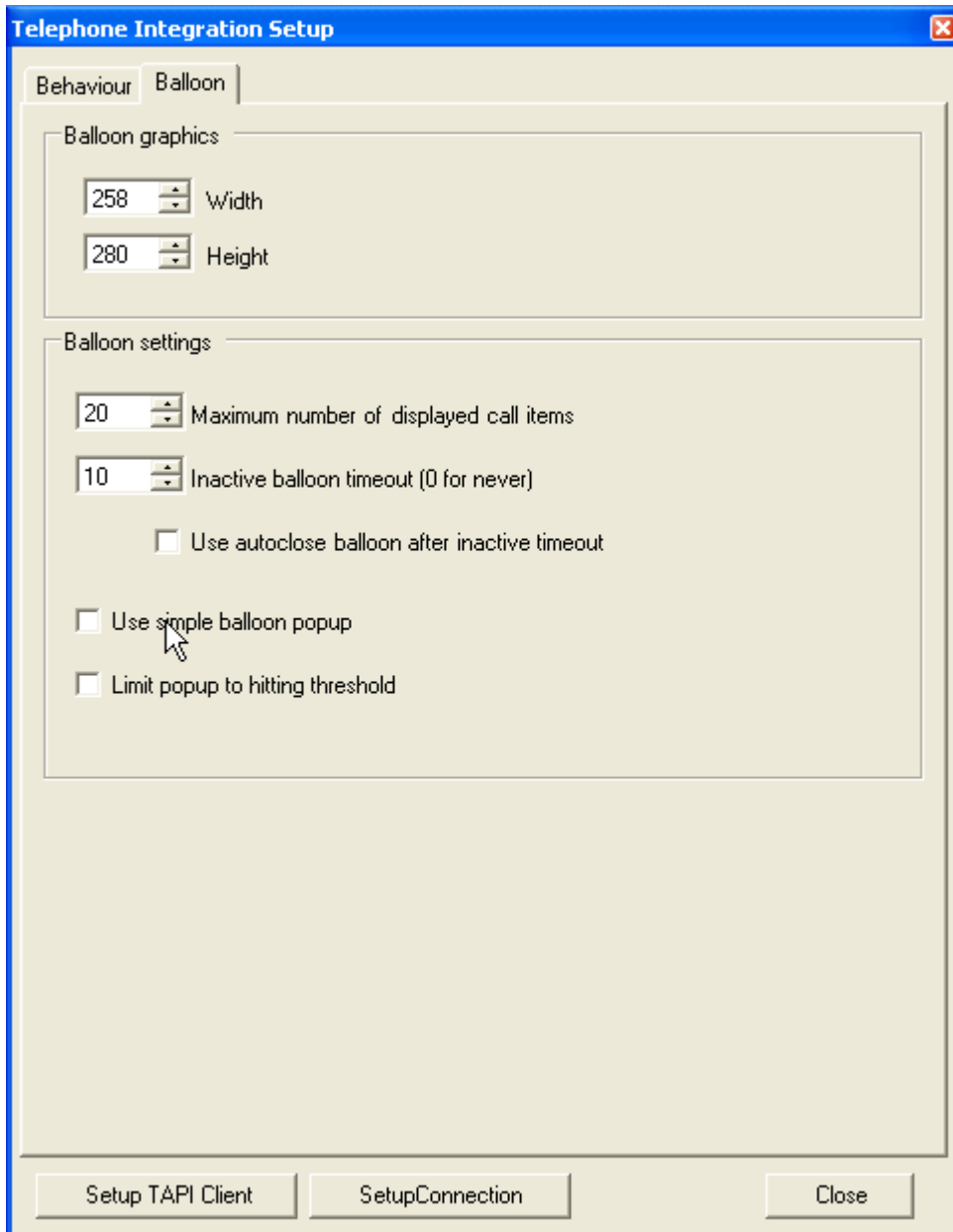
**open phone call activity:** if you are called and you lift the handset **TI** will create a Phone Call Activity...

- **generate new phone call activity (and always store it): stores it** and opens it for you.
- **only show phone call activity:** generates a new phone call activity without storing

**MISC:**

- **activate Debugging:** check this to activate debugging
- **WindowParam:** here you can change the settings of the Windows above. You can set the Start-Window-Size, if it is resizable and so on.

## 4.1 Balloon settings



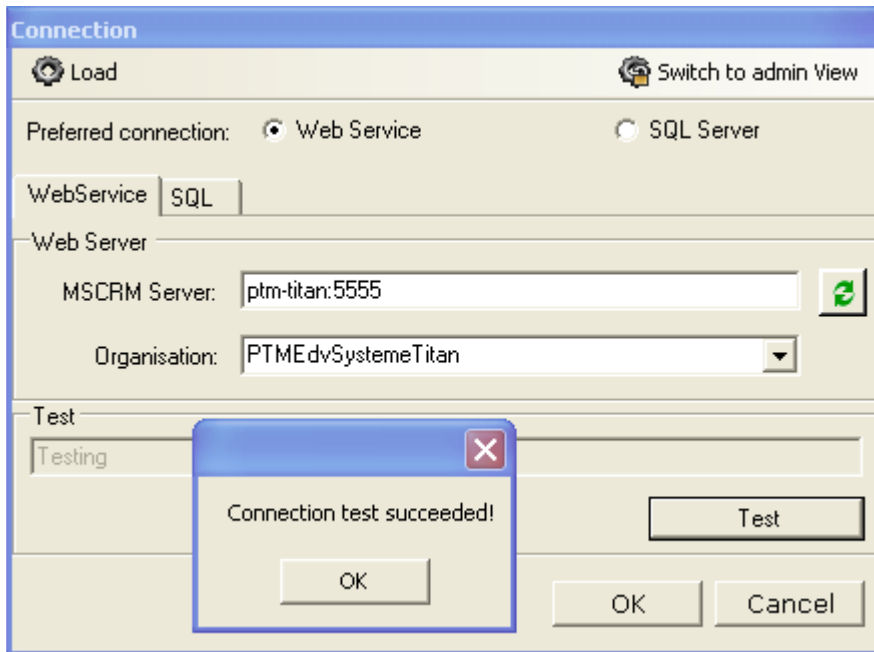
Under "Balloon graphics" the dimensions of the balloon can be altered. An easier way is using the resize function on the balloon window (see → 3.1 Balloon Element).

"Balloon settings" defines the behaviour of the balloon, when displayed.

Inactive balloon timeout defines the timespan, after which the balloon disappears, if no action is taken. Selecting an item or a function on the balloon prevents the timeout to close the balloon.

## 4.2 Server Settings

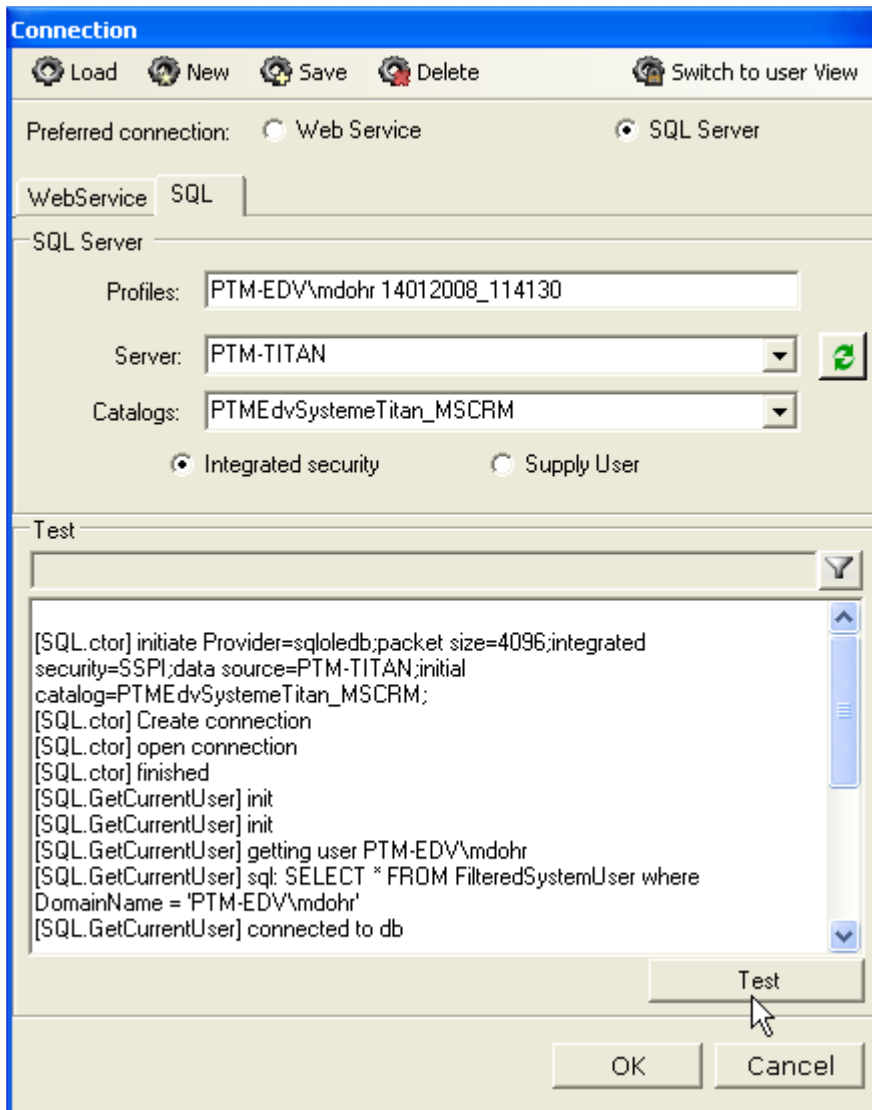
Switch to admin view to see detailed informations of the test and possible errors.



Here you have to enter your server name and port: CRM: port!

**For example:** tilsiter: 5554

Here is an example for the settings on the SQL Server:



## 5 Contact

If you have problems with Telephone Integration for MS CRM 4 send a Email to [support@mscrm-addons.com](mailto:support@mscrm-addons.com) or call +43 316 680 880 0