



Telephone Integration for Microsoft CRM 3.0 (TI)

Version 1.4

Users Guide

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1 Introduction

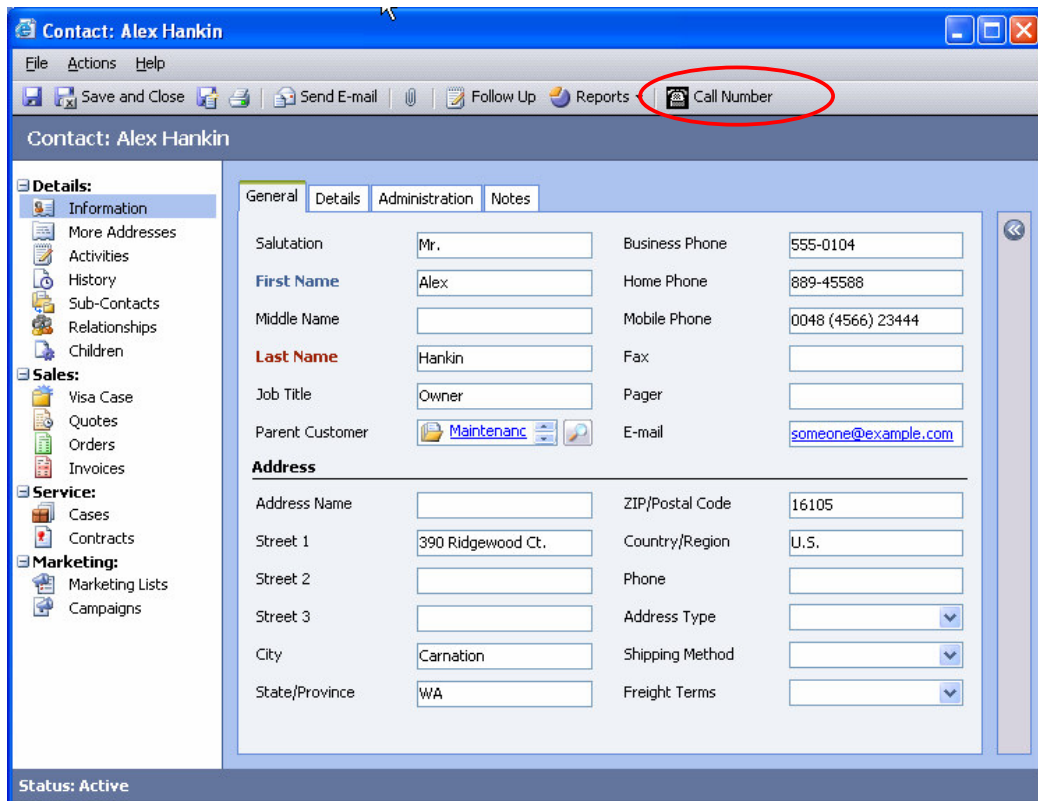
Telephone Integration for Microsoft CRM 3.0 (**TI**) is a CRM Add On which enables you to connect your Telephone System (CTI) to Microsoft CRM 3.0. It works in both directions (incoming and outgoing) and is easy to handle.

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 Telephone Integration dials the number for you and also creates an outgoing phone activity.

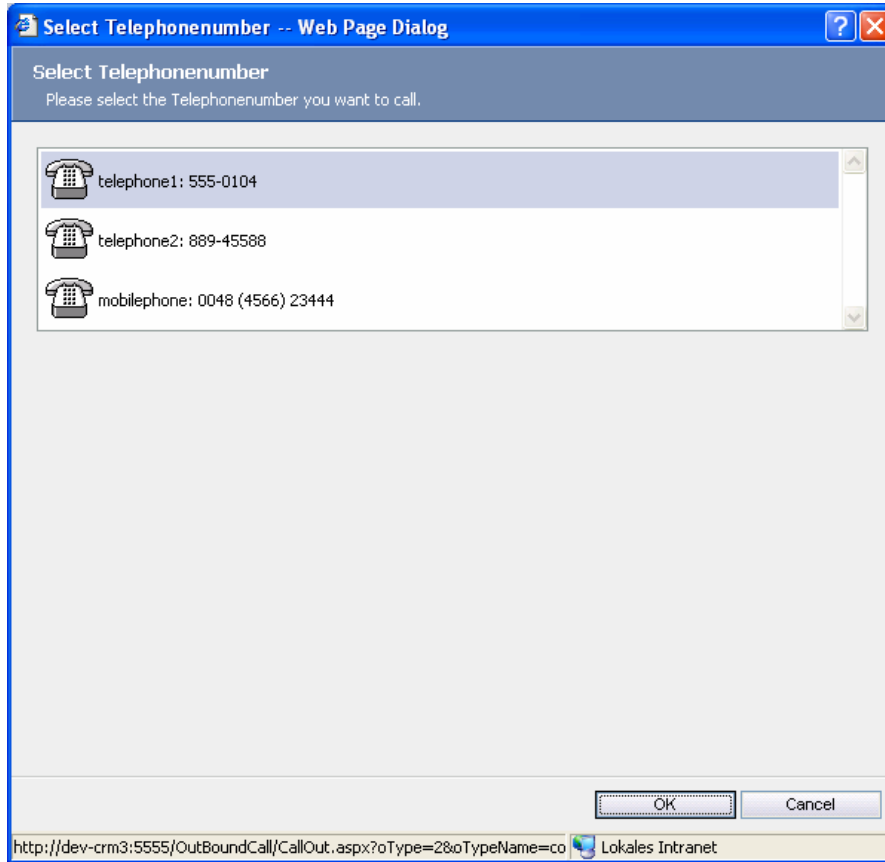
2 Outgoing calls

Go to your Account or Contact and open it.



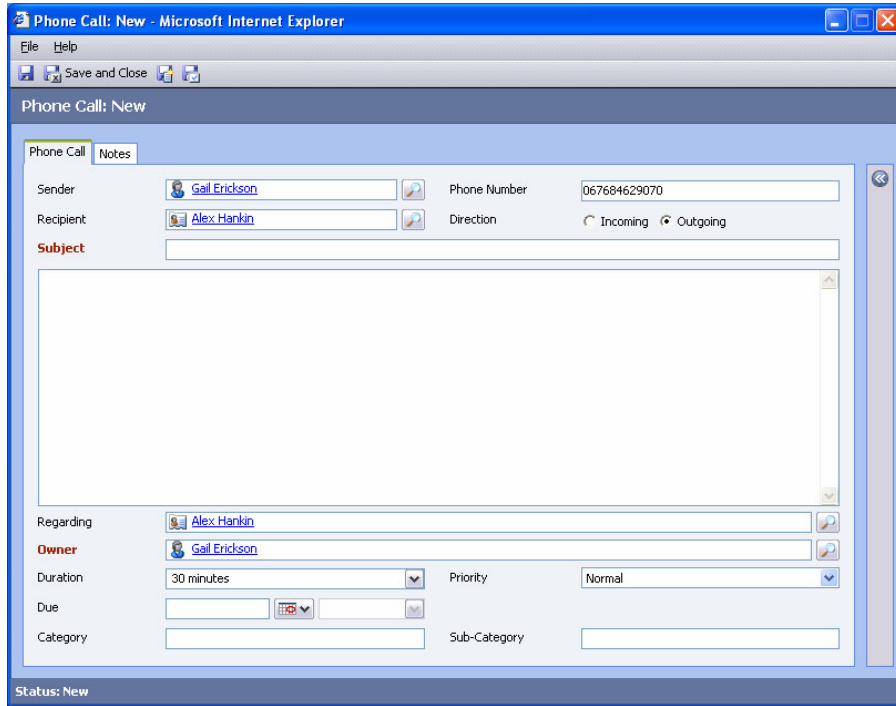
Then just click on [Call Number]

The new Web Page Dialog with all available numbers opens.



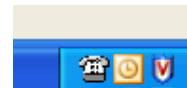
Now select the Number you want to call and then press [OK] or activate the call by Double-Click.

During your phone is now creating the call the activity will be open.



3 Incoming Call

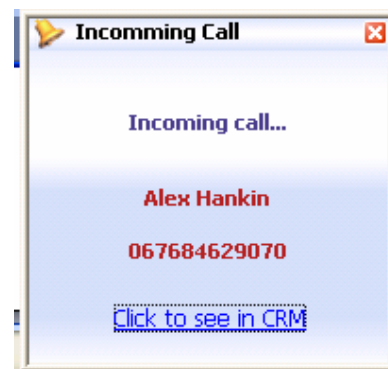
If **TI** is started, you can see a little telephone Icon in the Context-Menu.



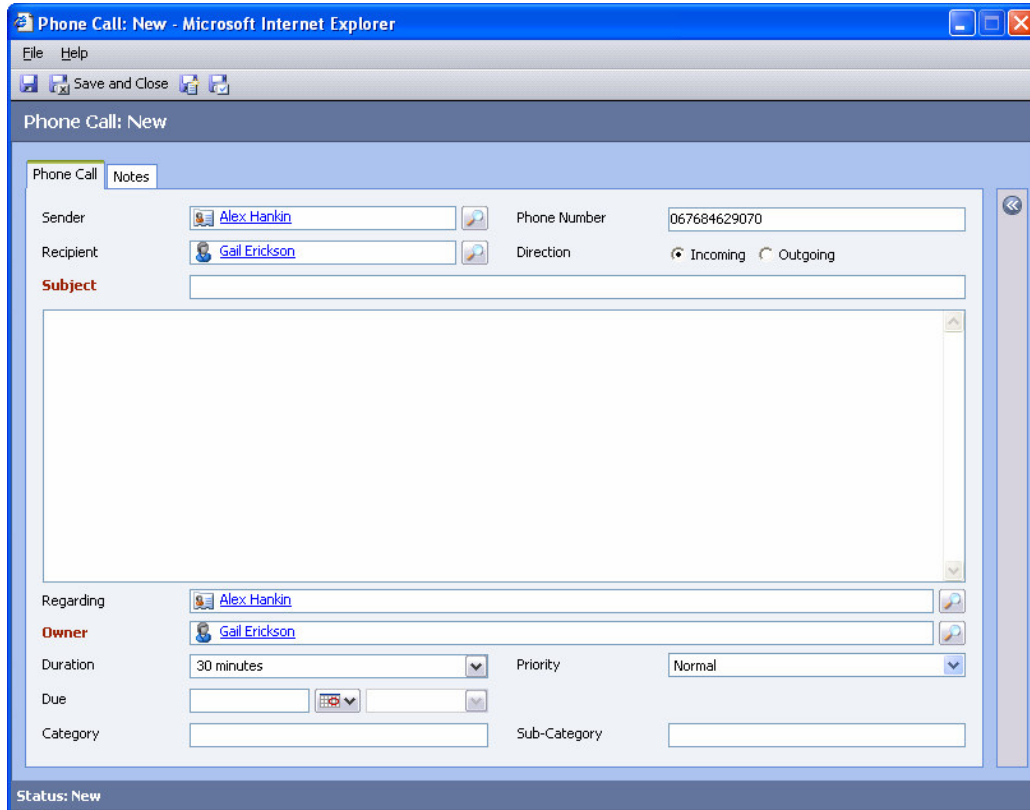
If you receive a phone call a little Balloon-Window appears. If TI can find the Number in CRM, it shows you the Name.

This Windows can be closed by clicking on the X or it closes automatically after 15 sec.

If you wish to see the contact in CRM, you can use the Link "Click to see in CRM" or just lift the handset.



Also a (incoming) phone activity will be created.



Phone Call: New - Microsoft Internet Explorer

File Help

Save and Close

Phone Call: New

Phone Call Notes

Sender: Alex Hankin Phone Number: 067684629070

Recipient: Gail Erickson Direction: Incoming Outgoing

Subject:

Regarding: Alex Hankin

Owner: Gail Erickson

Duration: 30 minutes Priority: Normal

Due:

Category: Sub-Category:

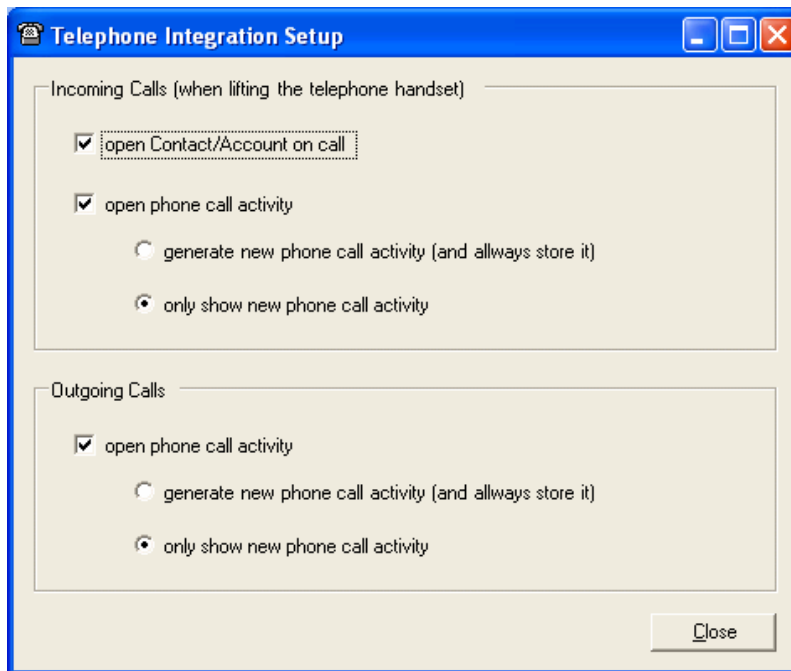
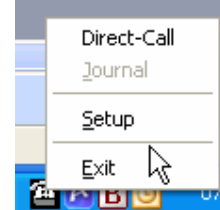
Status: New

Also the Contact/Account will be opened.

4 Configuration

To change the configuration start *Telephone Integration Setup*. (Start - All Programs - Telephone Integration for MS CRM 3 - Telephone Integration Setup)

Or Click with the right mouse button on the Icon in the Context-Menu and a little menu will appear - click on [Setup].



INCOMING CALLS:

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:

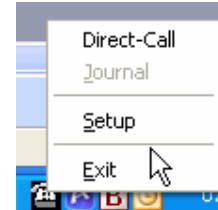
open phone call activity: if you are called and you lift the handset **TI** will create a Phone Call Activity...

- **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

5 Direct Call

This allows you to enter a phone number and to call it for you. This would be helpful if you want to call a long number or something else.

Click with the right mouse button on the Icon in the Context-Menu and click on [Direct-Call].



Just copy the number (for e.g. out of an email) – paste it into the field and press [Call] or <Enter>.

It also includes the logic to “clean” the Number. So if you entered +43 (316) 680 880 – 14 Direct-Call cleans it to 004331668088014.

6 Contact

If you have problems with Telephone Intgration for MS CRM 3 send a Email to support@mscrm-addons.com or call +43 316 680 880 0