

TelephoneIntegration Client for MS CRM 2013

Version 6.16 - October 2014

Client Installation and User Guide

(How to install and work with TelephoneIntegration Client for MS CRM 2013)

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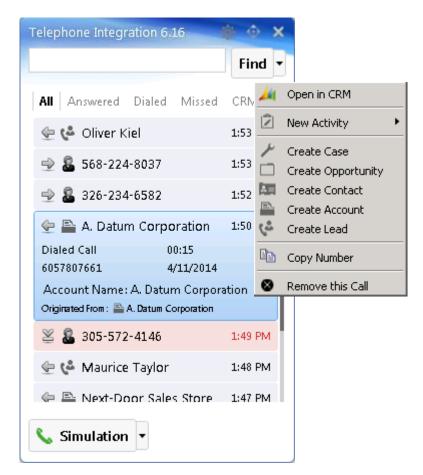
1 User Guide

This guide gives detailed explanations of all functionalities provided by **TelephoneIntegration for MS CRM 2013.**

If you need to reach us, see the Contact page.

2 Introduction

TelephoneIntegration for Microsoft CRM 2013 (**TI**) is a CRM Add On which enables you to connect your Telephone System (CTI) to Microsoft CRM 2013.



This Guide contains important information about:

- Installing the Client
- The capabilities of the Balloon
- Configuring the Client



3 Installing the TI-Client for MS CRM 2013

3.1 Prerequisites

3.2 Introduction

Run the TelephoneIntegration Client for MS CRM 2013 Setup file. The following window will appear:

| 📅 Telephone Integration Client for M5 CRM 2013 | | | | |
|--|---|--|--|--|
| | Welcome to the Installer for Telephone Integration Client for MS CRM 2013, Version 6.1 | | | |
| MSCIM-2 Your company | The Installer will install Telephone Integration Client for MS CRM 2013 on your computer. To continue, click Next. | | | |
| ddons: COMSi for MS-CRIM ADD-ONSI | WARNING: This program is protected by copyright law and international treaties. | | | |
| | < Back Next > Cancel | | | |

Click [Next] to proceed.

INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to <u>chapter</u> 3.6 directly after accepting the EULA.



3.3 EULA (End User License Agreement)

| 🚏 Telephone Integration Client for MS CRM 2013 🛛 🗙 | | | | | |
|---|---|--------------|-----------|--|--|
| License Agreement | 4ª. | | ddons.com | | |
| Please read the following license agreen carefully. | nent | Telephone In | tegration | | |
| FORM OF END US | ER LICENSE A | REEMENT | | | |
| | | | | | |
| MSCRM-ADDONS.COM SOFT | MSCRM-ADDONS.COM SOFTWARE LICENSE AGREEMENT | | | | |
| IMPORTANT: THIS SOFTWARE LICENSE AGREEMENT ("LICENSE | | | | | |
| AGREEMENT") IS A LEGAL AGREEMENT BETWEEN CLIENT AND | | | | | |
| MSCRM-ADDONS.COM. READ IT CAREFULLY BEFORE USING THE SOFTWARE. IT PROVIDES A LICENSE TO USE THE SOFTWARE AND | | | | | |
| CONTAINS WARRANTY INFORMATION, LIABILITY DISCLAIMERS AND | | | | | |
| I accept the terms in the license agreement Print | | | | | |
| C I do not accept the terms in the license agreement | | | | | |
| InstallShield | | | | | |
| | < Back | Next > | Cancel | | |

Click [Next] to proceed.

3.4 Folder Selection

| 🙀 Telephor | e Integration Client for M | 5 CRM 2013 | | × |
|-----------------|--|----------------|---------|-----------|
| | on Folder It to install to this folder, or clic to install to a different folder. | k | mscrm-a | ddons.com |
| | Install Telephone Integration C:\Program Files (x86)\PTM E Integration Client for MS CRM | DV-Systeme Gmb | | Change |
| InstallShield – | | < Back | Next > | Cancel |

Click [Change] to specify a different installation path Click [Next] to proceed



3.5 Start Options

Configure the start options and proceed with a click on [Next]

| 🚏 Telephone Integration Client for MS CRM 2013 - InstallShield Wizard 🛛 🔀 | | | | |
|---|----------------------|---|--|--|
| Select Start options | mscrm-addons.cor | n | | |
| | | | | |
| Automatically start TI on Window | ws start | | | |
| ☑ Start TI after installation | | | | |
| | | | | |
| | | | | |
| InstaliShield | | | | |
| | < Back Next > Cancel |] | | |

3.6 Confirm Installation

| 🚏 Telephone Integration Client for M5 CRM 2013 🛛 🛛 🗙 | | | | |
|---|---|--|--|--|
| Ready to Install the Program The wizard is ready to begin installation | mscrm-addons.com | | | |
| Click Install to begin the installation. | | | | |
| If you want to review or change any of exit the wizard. | your installation settings, click Back. Click Cancel to | | | |
| | | | | |
| InstallShield | | | | |
| עומו ומושטעו וויידי | < Back Install Cancel | | | |

To start the installation, click on [Install]. To change the settings, click on [Back].



3.7 Install Windows Identity Foundation

In order to use TI-Client for MS CRM 2013 you first have to install Windows Identity Foundation.

| Microsoft WIF PrerequisiteInstaller |
|---|
| Welcome to the WIF Prerequisite Installer. Detection finished |
| Identified OS: Windows 7 64-bit |
| OS Architecture: 64 bit |
| WIF Installation Status : NOT Installed |
| |
| |

3.8 Configure CRM-Connection

To configure your CRM Server, select your Profile or create a new profile and select your CRM Server type:

| Logon information | | | | |
|--|---|------------------------------------|--|--|
| Welcome to your CRM Connection setup. | | | | |
| Please specify your connection details to system administrator | o connect to CRM. If you do not know the connec | ction details, please contact your | | |
| CRM Connection Advanced Settings | Log | | | |
| Existing Profiles | | ▼ Manage | | |
| Select your Crm Type | | | | |
| C Standard (onPremise) | C IFD (Hosted) | C Crm Online | | |
| CRM Server-Url: | | | | |
| http:// | | | | |
| | | | | |
| Authenticated as: | ugh information to retrieve organizations | | | |
| | | | | |
| Username | Domain Passw | vora j | | |
| | [| | | |
| | Retrieve all Organizations | | | |
| Organization information: | | | | |
| Friendly name Unique name | ServiceURL | | | |
| | | | | |
| | | | | |
| Reset LivelD Cache | | OK Cancel | | |
| | | | | |

Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials.



As soon as the organizations are retrieved, press the "OK"-button.

| | CDM Counselies a | | | | |
|--|-------------------------|--|------------------------------------|--|--|
| - | CRM Connection s | • | | | |
| ease specify your co stem administrator | | nnect to CRM. If you do not know the con | nection details, please contact yo | | |
| RM Connection Ac | Ivanced Settings Log | | | | |
| xisting Profiles | [HKCU] crm2013 - Co | ntoso | ▼ Manage | | |
| Select your Crm Typ | | | | | |
| Standard (on | Premise) | C IFD (Hosted) | 🔿 Crm Online | | |
| CRM Server-Url: = | | | | | |
| http:// 💌 crr | n2013 | | → | | |
| | | | | | |
| | | | | | |
| Authenticated as: | | | | | |
| | dentials Integrated St | ecurity (CONTOSO\administrator) | | | |
| Use default Cre | dentials Integrated So | ecurity (CONTOSO\administrator) | | | |
| | identials Integrated Se | | ssword | | |
| Use default Cre | identials Integrated So | | ssword | | |
| Use default Cre | identials Integrated So | Domain Pa | ssword | | |
| Use default Cre | dentials Integrated So | | ssword | | |
| Use default Cre | | Domain Pa | ssword | | |
| I Use default Cre Username ☐ | | Domain Pa | ssword | | |
| Use default Cre Username | ation: | Domain Pa | ssword | | |
| Use default Cre Username | ation: | Domain Pa | ssword | | |
| Use default Cre Username | ation: | Domain Pa | ssword | | |
| Use default Cre Username | ation: | Domain Pa | ssword | | |

If you save a new profile following window appears:

| Save Profile | | | × |
|--------------|-------------------|------|--------|
| Profilename: | crm2013 - Contoso | | |
| | | Save | Cancel |

Click on [Save] to save your profile.

Click on Cancel if you don't want to save the profile.



3.9 Configure Integrations

There are seven possible interfaces that can be used with the TelephoneIntegration-Client:

| 🔜 Available interfaces | | |
|--|---|---|
| Interface selection | | mscrm-addons.com |
| Available plugins TAPI Skype OCS Lync2010 Lync2013 Simulation TAPI2 RingCentral SDK API | Setup details Select a Line AgileVPN PPTP RAS PPPoE Line SSTP WAN Miniport (L2TP) | Other settings Local Loop Number: Remove this Country-Code: 001 Remove this Area-Code: 0316 Enable the plugin at systemstart Select this plugin as defaultplugin |
| | <u> </u> | Test |
| | | Continue |

| 3.9.1 | TAPI: | direct connection via your telephone system. If an adequate driver is installed, your phone-line will appear in the "Select Line"-list. For configuration details see <u>chapter 9.3</u> |
|-------|--------------|--|
| 3.9.2 | Skype: | allows using your Skype-account to handle calls. For configuration details, see <u>chapter 9.1.1</u> |
| 3.9.3 | OCS: | allows using the OCS Wrapper to handle calls. For configuration details see <u>chapter 9.4</u> |
| 3.9.4 | Lync2010: | allows using the Lync2010 Wrapper to handle calls. For configuration details see <u>chapter 9.5</u> |
| 3.9.5 | Lync2013: | allows using the Lync2013 Wrapper to handle calls. For configuration details see <u>chapter 9.6</u> |
| 3.9.6 | Simulation: | allows simulating an incoming and outgoing call. For configuration details see <u>chapter 9.7</u> |
| 3.9.7 | RingCentral: | the RingCentral Wrapper provides a way for 3 rd Party tools to control TI client behavior by incoming calls. For details see <u>chapter 9.8</u> |



| 3.9.8 | SDK API Plugin: | enables the connection between TelephoneIntegration Client and a .NET application that can communicate with a specific phone device based on its specific SDK with basic phone commands. (dialing/answering/ending the call). For details see <u>chapter 9.9</u> . |
|-------|-----------------|--|
| 3.9.9 | InIn Wrapper: | enables the connection between TelephoneIntegration Client and the <u>Interactive Intelligence</u> phone system. This plugin supports outgoing call. Incoming calls are not yet supported. For details see <u>chapter 9.10</u> . |

3.10 Finish Installation

Depending on the options defined in <u>chapter 3.5</u> the Client will start automatically or can be started as described in <u>chapter 4</u>.

| 🙀 Telephone Integration Clie | nt for MS CRM 2013 | × |
|---------------------------------|--|---|
| | InstallShield Wizard Completed | |
| MSCIM-add Your company for M | The InstallShield Wizard has successfully installed Telephone Integration Client for MS CRM 2013. Click Finish to exit the wizard. | |
| pany for MS | | |
| RIM ADD-ON | | |
| | | |
| | < Back Finish Cancel | |

Click on [Finish] to complete the installation.

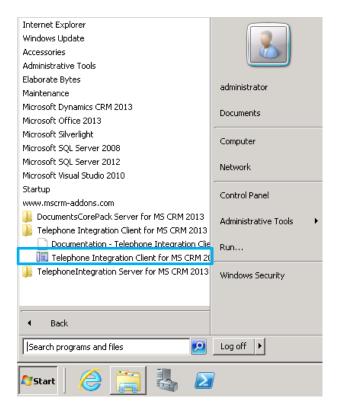


4 Getting Started

4.1 Starting the TelephoneIntegration Client

The application can be started via the windows-menu → All Programs → www.MSCRM-ADDONS.com → TelephoneIntegration Client for MS CRM 2013 or from the Installation Directory.

It is possible to configure the TelephoneIntegration-client to automatically start on windows-startup.



Once started, an icon appears in the taskbar:



This gray icon with the \bigcirc sign means that the application is loading/connecting to CRM. Please wait until the icon is colorized:



The client is ready to use. Click on the icon to open the TI Balloon. See chapter 5.2



5 The User Interface

5.1 How to enable or disable the DFR (dialing from relationship) from TI

In general, TelephoneIntegration (TI) allows users to dial from related CRM-records. This means, that they have the possibility, to choose from a list of records related to the initially opened one when dialing out from CRM (e.g. from related leads, contacts, etc.). In regards to this you have now the possibility to disable this feature.

There are two options, to enable or disable this feature on CRM:

Server-side or Client-side:

- Server-side means, that the whole TelephoneIntegrationServer-users could be set enable or disable. If server-side is set disabled, no server-user could set his TI client enable.
- Client-side means, that just the TelephoneIntegration user could set his own TI client enable or disable.

How to enable/disable DFR by Server-side:

- If you set this setting on "false", then the whole TelephoneIntegration server-users would be set disabled from DFR.
- If you set this setting on "true", then all users of TelephoneIntegration are able to use DFR.

Server-side settings are overruling the client-side settings.

Client or Server setting are using the same key name: UseDFR



Follow the steps below to to enable/disable DFR by Server-side:

Open CRM - go to "Microsoft Dynamics CRM" Logo on the left corner - click on settings



Click again on "SETTINGS" - go to the "Extensions Area" and click on "MSCRM-ADDONS.com Products".

| 1 | k~ ∩ | Settings ~ | Bu | usiness Managem | | | \oplus | ۵ |
|---|-------------|------------|----|-----------------|---|--------------------|----------|---|
| | Extensions | | | 1 | | | | |
| < | MSCRM-A | DDONS.CO | > | MSCRM-ADDONS.CO | ~ | POWERSEARCH CONFIG | | |

This action will open following window:

| 🗸 🗸 💼 🕴 SETTINGS 🗸 🛛 | ISCRM-ADDONS.c 🗸 | | \oplus | |
|-----------------------------|--|---------------------|-----------------|------------|
| CRM for Outlook See how CRM | or Outlook makes you even more productive. | Get CRM for Outlook | | : |
| 🕇 NEW 💼 DELETE 🖙 🗋 | COPY A LINK 🛛 🔹 🗈 RUN REPORT 👻 | EXPORT TO EXCEL | ••• | |
| ↔ Active MSCRM-A | DDONS.com Pr • | Search for records | | Q |
| ✓ Name ↑ | Product Type | Created By Cr | reated On 🛛 🝸 | <i>e</i> < |
| DocumentsCorePack | server | CRM System | 9/24/2013 7:45 | |
| Plugin | server | CRM System | 9/23/2013 12:32 | ™ Charts |
| PowerSearch | server | CRM System | 9/24/2013 3:58 | |
| TelephoneIntegration | server | CRM System | 9/26/2013 5:38 | |
| | | | | |
| 1 - 4 of 4 (0 selected) | | | M 🖣 Page 1 | P |

Choose TelephoneIntegration and click on the dropdown button next to "TelephoneIntegration" in the ribbon and open "MSCRM-ADDONS.COM SETTINGSKEYS". See next screenshots:

| 🊈 🗸 👘 SETTINGS ∽ 🛛 | MSCRM-ADDONS.c 🗸 | Tele | phoneIntegration | | \oplus | ¢ |
|----------------------|--------------------|------|------------------|-------|----------|----------|
| Common | | | Process Sessions | | | |
| | \diamond | | Ċ | | Q | , * > |
| AUDIT HISTORY | MSCRM-ADDONS.COM S | E | BACKGROUND PROC | ESSES | REA | AL- |
| | | | | | | |



| 😋 💽 🗢 🚂 http://crm2013/Contoso/main.aspx#2 | 214632014 🔎 🗹 🌆 MSCRM-# | ADDONS.com Produ × | | |
|--|---|--------------------|-----------------|-----------------------------------|
| u 🤟 🏦 settings 🗸 Mscri | M-ADDONS.c 🗸 TelephoneInt | tegration 🗸 🗸 | \oplus | * |
| | | | | ↑ ψ |
| | | | | |
| MSCRM-ADDONS.COM PRODUCTS : I | | | | |
| TelephoneInteg | aration | | | |
| | | | | |
| | gration | | | |
| | gradion | | | |
| | | Search for records | | |
| MSCRM-ADDONS.c | om Settingsk | | | |
| MSCRM-ADDONS.c | | | | |
| MSCRM-ADDONS.c | om Settingsk | | IsCached | Cr 🕊 |
| MSCRM-ADDONS.C + add new mscrm-addo | com Settingsk d existing mscrm-a 🕞 bulk deli keyValue | | IsCached Yes | |
| MSCRM-ADDONS.c + add New MSCRM-Addo | com Settingsk d existing mscrm-a 🕞 bulk deli keyValue | ETE | | Cr Y |
| MSCRM-ADDONS.cc + ADD NEW MSCRM-ADDO AD NEW MSCRM-ADDO AD New MSCRM-ADDO AD New MSCRM-ADDO AD New MSCRM-ADDON AD New | COM Settingsk D EXISTING MSCRM-A R BULK DELI KeyValue <settings><account><</account></settings> | ETE | Yes Yes | Cr ▼ 9/26/20 9/26/20 |
| MSCRM-ADDONS.c + ADD NEW MSCRM-ADDO Name ↑ buttonXML | COM Settingsk D EXISTING MSCRM-A R BULK DELI KeyValue <settings><account><</account></settings> | ETE | Yes | Cr T 9/26/20 |

Click on "+ ADD NEW MSCRM-ADDONS.com Settingskeys". See screenshot above.

| 🏄 🗸 🏦 🛛 New MSC | RM-ADD | \oplus | 🚺 🌣 ? |
|------------------|----------------------------|----------|-------|
| SAVE + NEW 🗐 | FORM 🔊 POWER SEARCH | | |
| MSCRM-ADDONS.COM | SETTINGSKEYS : INFORMATION | | |
| New MSC | RM-ADDONS.com Settingskeys | | |
| | <u> </u> | | |
| General | | | ^ |
| Name* Us | seDFR | | |
| IsCached * Ye | 15 | | |
| KeyValue fa | alse | | |
| | | | |
| | | | ~ |
| | | | * |
| Status A | ctive | | |

- **Name:** Type in "UseDFR" to enable or disable DFR.
- **KeyValue:** If you set this setting on "false" the whole server-users, would be set disable. If you set this setting on "true", then all users are able to use this feature.

Click on [SAVE]



How to enable/disable DFR by Client-side:

Open your TI client. Now you can create a new string. Name the new string "UseDFR", then click twice on your new string, after this, you have the change to set DFR enable or disable by "true" or "false".

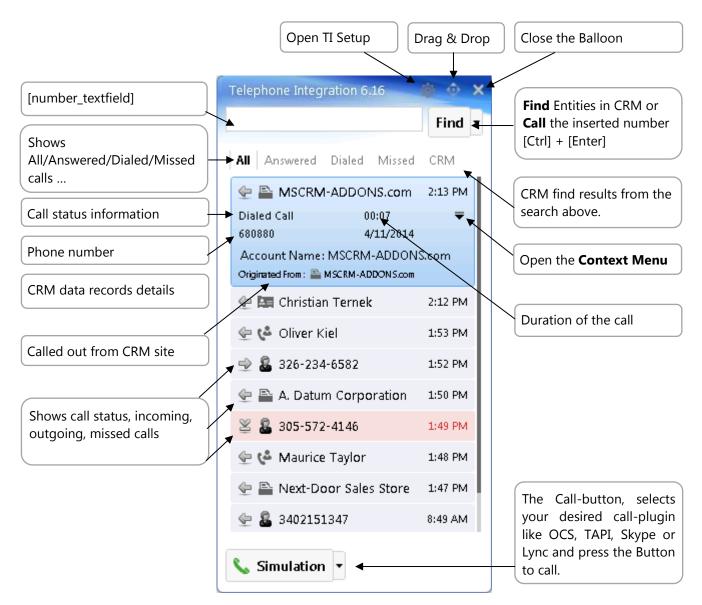
- If you set this setting on "false", then you will not be able to use DFR.
- If you set this setting on "true", then you will be able to use DFR.

| 🗄 📲 PTM EDV-Systeme | OCS_Server | REG_SZ | |
|----------------------------------|-------------------|--------|------------------------------------|
| | 🚺 赴 OCS_SignIn | REG_SZ | |
| E TelephoneIntegrationclient2011 | 🚺 👲 OCS_Transport | REG_SZ | TLS |
| CatBoandCall | 🛃 💩 OCS_URI | REG_SZ | |
| 🖃 🌗 Wow6432Node | ab path | REG SZ | C:\Program Files (x86)\PTM EDV-Sys |
| 🗄 📲 Microsoft | UseDFR | REG_SZ | false |
| 🕀 🌗 System | | | |
| 😟 🌗 Volatile Environment | Edit String | | × |
| | | | |
| | Value name: | | |
| | UseDFR | | |
| 🕀 🌐 SAM | | | |
| SECURITY | Value data: | | |
| | true | | |
| AspNetProcess | | | |
| 🗄 🕒 ATI Technologies | | | OK Cancel |
| 🕀 🌗 Classes | | | |
| 🕀 🎍 Clients | | | |
| | | | |



5.2 The TI Balloon

The "balloon" provides the main user-interface. It contains all client-side functionalities.



How to initiate an outgoing call?

- A call can be started by simply selecting the item (contact, account...) in the list and double click on it. The "CRM" tab shows the search-results from CRM.
- Additionally, you can just type the number you want to call into the [number_textfield] and press **Ctrl+Enter** or click on the Call button.



5.3 Integrated Search

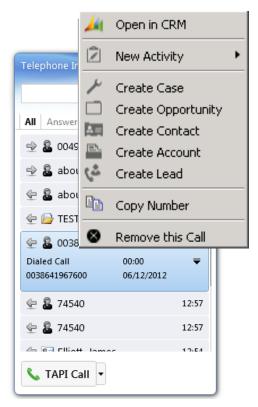
By using the Find button, it is possible to search for CRM-records from within the balloon. Therefore there is no need to open CRM in order to call a contact, account, lead etc. You can search it by name or by phone numbers.

Telephone Integration 6.16 ۵ Telephone Integration 6.16 +43 (0)316 680 880 20 Ternek Find Find 💌 All Answered Dialed Missed CRM All Answered Dialed Missed CRM 🔙 Christian Ternek In Josef Ternek → Business Phone: + 43 (0)316 680 880 20 → Business Phone: + 43 (0)316 680 880 Mobile Phone: + 43 (0)676 856 65 Mobile Phone: +43 (0)676 26 55 99 Josef Ternek → Business Phone: + 43 (0)316 680 880 20 Mobile Phone: +43 (0)676 26 55 99 📞 Simulation Simulation



5.4 The Context Menu

Several CRM-functionalities are available in the context menu of a phone call:



If the user has no sufficient CRM-rights to create those records, these functionalities are automatically disabled.



5.5 The Application Menu

Right-click on the TI toolbar icon to open the Application-Menu. It provides the possibility to:

- Open the balloon
- Call the number that is saved in the clipboard (see screenshot)
- Open Call-History (see chapter 5.6)
- Open Personal Phone Book (see chapter 5.7)
- Open Power Dialer (see chapter 11)
- Show info (license state)
- Drop call and reset (see screenshot)
- Open Setup
- Exit (shutdown the CTI client)

| Show Balloon | Quick-Call/Clipboard-Action: |
|--|--|
| Call: [+43 (0)316 680 880 2] 🗲 | The number saved in the clipboard can be called from this menu directly. |
| Personal Phone Book History Power Dialer Info | Drop calls and reset : The CTI will be restarted. In case of any communication issues with the connected call-info provider, chose |
| Drop calls and reset | this functionality. Setup the TelephoneIntegration |
| Exit | Configuration (chapter 9) |



5.6 History Window

The History provides an overview of all of your calls. It is accessible via the application menu <u>(see chapter 5.5)</u>. Those records are stored on the CRM server and cannot be deleted by the user.

| Drag a column header and drop it here to group by that column | | | | | | | | _ |
|---|-----------|----------|-----------------|------------------|------------------|------------|-----------------------------|---|
| Crm Data 🗡 | Date T | Time T | Direction $	au$ | Phone Number 🛛 🔨 | Caller Name 🗡 | Duration T | Originated From $ {f 	au} $ | |
| | 10/7/2013 | 12:35 AM | ÷ | | | 00:00:00 | | |
| Ś | 10/7/2013 | 12:17 AM | ¢ | 000034316680880 | Christian Ternek | 00:00:29 | | |
| Ś | 10/6/2013 | 11:57 PM | ÷ | 000034316680880 | Christian Ternek | 00:00:04 | | |
| Ś | 10/6/2013 | 11:52 PM | ÷ | 0000034316680880 | Christian Ternek | 00:00:07 | | |
| Ŵ | 10/6/2013 | 11:49 PM | ¢ | 000034316680880 | Christian Ternek | 00:00:04 | | |
| | 10/6/2013 | 11:49 PM | ÷ | | | 00:00:00 | | |
| | 10/6/2013 | 11:48 PM | ¢ | 00676824989304 | | 00:00:04 | | |
| Ś | 10/6/2013 | 11:47 PM | ¢ | 00034316680880 | Christian Ternek | 00:00:10 | | |
| | 10/2/2012 | 44.4E DM | ~ | 000004046600000 | | 00.00.00 | | |

You can also use redialing in History window by selecting the phone call record and pressing the [Call] button.

5.7 Personal Phone Book Window

The Personal Phone Book is not part of the CRM. It helps you store information of any person that is not in the CRM system, but you want to be resolved.

| none Number | First Name | Last Name | Add Inf |
|--------------|------------|-----------|---------|
| Phone Number | First Name | Last Name | |
| +43316845698 | Maria | Berghold | |
| +43316862016 | Josef | Kompacher | |
| +43316693064 | Katharina | Maier | |
| | | | |



6 MS CRM 2013 Integration

6.1 Start an outgoing Call from MS CRM 2013

By pressing on the [Call Number] button, the TI Clients balloon pops up with the available phone numbers of the originated CRM data record, as well as with phone numbers of all related data records.

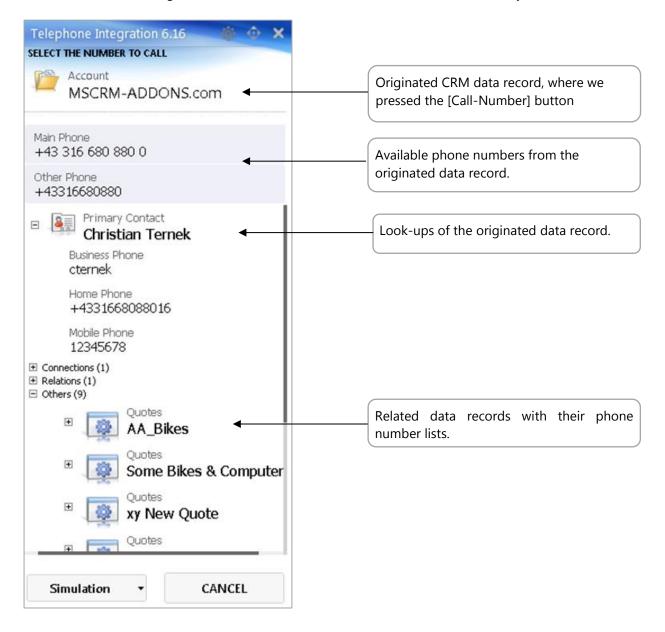
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| Account Name * | MSCRM-ADDONS.com | Enter post here | 🛄 Call number | POST | |
| Phone | +43 (0)316 680 880 | Both Auto posts User posts | 🗘 Share | | CONT |
| Fax | +43 (0)316 680 880 25 | MSCRM-ADDONS.com | ☆ Follow | | Full N |
| Website | http://www.mscrm-addons.com | Account: Created By CRM Sys | | | |
| Parent Account | | On MSCRM-ADDONS.com's v Today | Start Dialog | | Christ |
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| Telephone Integration 6.12 | × |
|---|---|
| SELECT THE NUMBER TO CALL | |
| MSCRM-ADDONS.com | |
| Main Phone +43 (0)316 680 880 | |
| Others (2) | |
| Contacts Christian Ternek Business Phone +43 (0)316 680 880 Mobile Phone +43 (0)676 856 65 Contacts Contacts Josef Ternek Business Phone +43 (0)316 680 880 20 Mobile Phone +43 (0)676 26 55 99 | |
| Simulation CANCEL | |



If no related CRM-records are found and the originated CRM record has only one phone number, this number will be immediately called.

Per default TI Client always search for related CRM-records if you do not set it otherwise. You can disable searching for related CRM-records at server-side or on client-side layer.





Search for related CRM-records is per default always enabled for all users.

However there are possibilities to completely enable or disable this feature on <u>CRM server side</u> or locally on the client side.

Server-side "UseDFR" setting:

- If you set this setting on "false", then none of TI users will be able to use this.
- If you set this setting on "true", then all of TI users will use this feature.

If you did not set this setting on server-side layer, then per default every TI user will use it, except those who will disable it locally. Server-side setting are overruling the client-side settings.

Client-side "UseDFR" setting in the local registry:

HKEY_CURRENT_USER\Software\PTM EDV-Systeme\TelephoneIntegrationclient2013

- If you set this setting on "false", then the local TI user will not be able to use this feature.
- If you set this setting on "true", then the local TI user will be able to use this feature. Not setting this feature at all, is same as you would set it with "true".

If TI User is using DFR feature, then he can set additional restrictions for it server-side. (For more information, please read our <u>blog article</u>)



6.2 How to assign unresolved numbers to existing CRM records

TelephoneIntegration provides the possibility to assign unresolved numbers to already existing CRM records (accounts, contacts and leads). To do so, you just have to right-click on the number to open the context-menu. Then, chose "Add to Existing Entity" (see screenshot below).

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|-----------------|-----------|-------------------------------|---------|
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| All Answered | Dialec | Missed | CRM |
| 🔄 🖺 MSCR | | NS.com | 2:43 PM |
| 🖢 🖺 MSCR | M-ADD(| DNS.com | 2:13 PM |
| 😓 🔙 Christi | an Tern | ≥k | 2:12 PM |
| 🔄 🚱 Oliver | Kiel | | 1:53 PM |
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| 326-234-6582 | 🖄 Ne | w Activity | • |
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| 📞 Simulatic | - | oy Number | |
| | 😵 Re | move this Ca | ll |



A search window will open in which you could search for and select the required CRM record (see screenshot below). Afterwards, close the window and the number will be automatically added to one of the CRM record's phone fields.

IMPORTANT: These phone fields have to be configured as "search fields" in the TI Server configuration tool.

| Enter your search criteria. Look for Contact Look in Contacts Lookup View Search ternek | Show Only My Records | |
|---|-----------------------------------|--------|
| Full Name 🛧 | Email | e |
| Christian Ternek | christian.ternek@mscrm-addons.com | +43 3: |
| Josef Ternek | josef.temek@mscrm-addons.com | +43 3: |

Furthermore, you also have the possibility to create a new CRM record with the unresolved number assigned to (see first screenshot).



6.3 How to set restrictions for dialing from a related CRM-record

This means that they have the possibility to choose from a list of records related to the initially opened one when dialing out from CRM (e.g. from related leads, contacts, etc.).

In regards to this, you have the possibility to set restrictions for the related records to be displayed in the TelephoneIntegration balloon (e.g. In case of dialing out starting from an opportunity, you want accounts and to be displayed, but not the related contacts and leads). In order to do so, you have to create a new settings key.

Follow the steps below:

1. Open CRM – go to "Microsoft Dynamics CRM" Logo on the left corner – click on settings

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2. Click again on "SETTINGS" - go to the "Extensions Area" and click on "MSCRM-ADDONS.com Products".

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This action will open following window:

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| Plugin | server | CRM System | 9/23/2013 1 | 2:32 AM | Circle C |
| PowerSearch | server | CRM System | 9/24/2013 | 3:58 AM | 6 |
| TelephoneIntegration | server | CRM System | 9/26/2013 | 5:38 AM | |
| | | | | | (|
| | | | | | |



3. (1) Click the checkbox in front of 'TelephoneIntegration' and then (2) click on 'Edit'.

| MSCRM-ADDONS.com Products Active MSCRM-ADDONS.co MSCRM-ADDONS.com Products Active MSCRM-ADDONS.com MSCRM-ADDONS.com Products Active MSCRM-ADDONS.com MSCRM-ADDONS.com MSCRM-ADDONS.com Products Active MSCRM-ADDONS.com MSCRM-ADDONS.com Products Active MSCRM-ADDONS.com MSCRM-ADDONS.com Products Active MSCRM-ADDONS.com | | MSCRM-ADDONS.co | | | -⊔ ☆ { |
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| PowerSearch | server | CRM System | 10/2/2013 3:08 AM | | Charts |
| ✓ TelephoneIntegration | server | CRM System | 10/3/2013 3:11 AM | | ī |
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| | | | | | |
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| 1 - 3 of 3 (1 selected) | | | | I | |

Screenshot: Edit TelephoneIntegration in the CRM Settings

4. A new CRM window will open:

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| mscrm-addons.com products : information TelephoneIntegration | | | | |
| General | | | | |
| Name* TelephoneIntegration | | | | |
| Product Type server | | | | |
| Notes | | | | |
| Status Active | | | | _ |
| Active | | | | |



Within this window, (1) click on the dropdown-button next to TelephoneIntegration on the Top of the window and navigate to 'MSCRM-ADDONS.com Settingskeys' on the top and (2) click on 'Add New MSCRM-ADDONS.com Settingskeys'.

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This action will open following window:

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| | | | Λ Ψ |
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| MSCRM-ADDONS.COM PRODUCTS : | INFORMATION | | |
| TelephoneInte | aration | | |
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| MSCRM-ADDONS. | com Settingsk Search for records | | |
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| buttonXML | <settings><account><telephone1><label 1<="" lcid="1</td><td></td><td>10/3/20:</td></tr><tr><td>buttonXML CoreSInVersion</td><td></td><td></td><td></td></tr><tr><td></td><td><settings><Account><Telephone1><label lcid=" td=""><td> Yes</td><td>10/3/20:</td></label></telephone1></account></settings> | Yes | 10/3/20: |
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| CoreSInVersion customSQLWhere defaultButtonName ExecutableVersion fields.xml | <pre><settings><account><telephone1><label 1.0"="" ?="" lcid="1 2013.3 Call number 6.3 <?xml version=" standalone="yes"> <settings< pre=""></settings<></label></telephone1></account></settings></pre> | Yes Yes Yes Yes Yes Yes | 10/3/20: 10/3/20: 10/3/20: 10/3/20: 10/3/20: 10/3/20: |
| CoreSInVersion customSQLWhere defaultButtonName ExecutableVersion fields.xm1 firstinstall | <pre><settings><account><telephone1><label 1.0"="" ?="" lcid="1 2013.3 Call number 6.3 <?xml version=" standalone="yes"> <settings. false<="" pre=""></settings.></label></telephone1></account></settings></pre> | Yes Yes Yes Yes Yes Yes Yes | 10/3/20: 10/3/20: 10/3/20: 10/3/20: 10/3/20: 10/3/20: |

Within this window click on "+ADD NEW MSCRM-ADDONS.com Settingskey".



5. A new window will open. Within this window, put a name and a KeyValue with the following structure:

name: DFR_Disable_{entity name}
cached value: entity name1;entity name2; entity name3

Furthermore, set 'IsCached' as 'yes'.

In our example (dialing out starting from an opportunity, accounts should be displayed, but not the related contacts and leads), we have to type in the following (see screenshot below):

< "DFR_Disable_opportunity", "contact;lead" >

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| General | | | | |
| Name * | DFR_Disable_opportunity | | | |
| IsCached * | Yes | | | |
| KeyValue | contact;lead | | | |
| | | | | |
| | | | | |
| Status | Active | | | |
| Active | | | | B |

If you want to disable all subrelated data records (meaning that you do not want any related record to be displayed), you have to set "*" within the 'KeyValue'-field and 'DFR_Disable_opportunity' within the 'Name'-field.



7 Use TelephoneIntegration with MS Outlook

Users have the possibility to use TelephoneIntegration without a browser, but with Outlook only, meaning that TelephoneIntegration will open all windows (e.g. the CRM-call-activity, etc.) in Outlook and not in an internet browser window. For being able to use TelephoneIntegration with Outlook only, you have to install TelephoneIntegration Client v.5.54 or higher and create a new settingskey.

Please follow the steps below to do so:

1. Open CRM – go to "Microsoft Dynamics CRM" Logo on the left corner – click on settings

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2. Click again on "SETTINGS" - go to the "Extensions Area" and click on "MSCRM-ADDONS.com Products".

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This action will open following window:

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| Plugin | server | CRM System | 9/23/2013 12 | 2:32 AM |
| PowerSearch | server | CRM System | 9/24/2013 | 3:58 AM |
| TelephoneIntegration | server | CRM System | 9/26/2013 5 | 5:38 AM |
| | | | | |
| | | | | |



3. (1) Click the checkbox in front of 'TelephoneIntegration' and then (2) click on 'Edit'.

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Screenshot: Edit TelephoneIntegration in the CRM Settings

4. A new CRM window will open:

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| Active | | |

5. Within this window, (1) click on the dropdown-button next to TelephoneIntegration on the Top of the window and navigate to 'MSCRM-ADDONS.com Settingskeys' on the top and (2) click on 'Add New MSCRM-ADDONS.com Settingskeys'.

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TelephoneIntegration for MS CRM 2013



This action will open following window:

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6. Again, a new window will open. Within this window, put the name 'UseOutlookOnly' and the KeyValue 'true'. Furthermore, set 'IsCached' as 'yes'. (see screenshot below)

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| Name * | UseOutlookOnly | | | | | |
| IsCached * | Yes | | | | | |
| KeyValue | true | | | | | |
| | | - | | | | |
| Status | Active | | | | | |
| Active | | 8 | | | | |

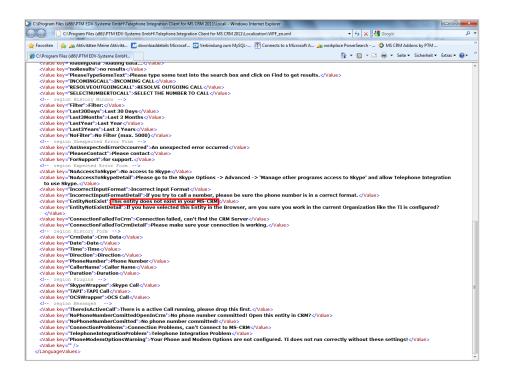
Restart the client. TelephoneIntegration will open all windows in Outlook instead of an internet browser.



8 Localization/Custom Language packs

To select another language pack, go into your installation path and search for the "Localization"-Folder. You can install language files (XML-documents) here or change already existing language file. To change values inside of the file open the XML-file and change the following Values and save the file by closing it. You should make a backup-file of the file you are editing.

Important: <u>Never</u> change the Key attributes! Only change the values!





9 Configuration Setup

To change the configuration start TelephoneIntegration Setup via the Application Menu (<u>chapter 5.5</u>).

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| Exit | <u>र</u> र | Looku Open ncoming Calls | / balloon-popup up number in CRM i internet explorer v | | g calls | matches |
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| | I Ope I Ope C | en phone call a Generate new | | personal numbers / (and always store it) ty | | |
| | Internet Br ⓒ Left Misc ☑ Activ | vate debugging | C Up to Down | O Overlappir | ng Show entity first Show phone ca nt outgoing call popup nt incoming call popup | all activity first |
| | SetupCon | nch CTI on sys | stem startup | | | Save |
| | | | | | | 0010 |



Balloon general:

TI client distinguish between internal calls and external calls. Regarding on those two types, TI client can determine if the phone call with that number should be processed or not. By processed it is meant:

- Should the number be recognized (resolved) as a CRM record?
- Should corresponded CRM entity open for that call?
- Should Call Phone activity open for that call?

Internal calls are determined with the number length or with the domain name in case of SIP numbers. In the figure below, internal calls are determined as those, who have a number length less than 4 digits, or who have a domain ptm-edv.at or mscrm-addons.com in their SIP numbers.

Below a sample is shown that by an incoming internal phone call the balloon should popup and the number will be resolved with the exact match. By outgoing internal calls, only the balloon should popup.

| Internal Calls | ts length to define extern calls |
|---|----------------------------------|
| Internal Domains: | |
| for incoming calls Show balloo Lookup num Open interne | |

Minimum number digits length to define extern calls: Defines the minimum number length, which has to be inserted to begin call processing. Calls that have less than the desired amount of digits will not be checked in CRM for caller-information unless we explicitly allow it.

Internal Domains: Contains the internal domains for sip numbers you do not want to check in CRM for additional information. For example:

On an incoming/outgoing call with the caller having a sip address sip:username@mscrm.addons.com and you don't want that this address to be resolved, you need to add "mscrm-addons.com" domain into the text field. Multiple domains are separated with semicolon ";".

Show balloon popup: Defines should the TI Balloon popup by internal incoming or internal outgoing calls.

Lookup number in CRM: Defines should the TI client search in CRM for record that matches this phone number by incoming or outgoing calls.

Only exact matches: Shows only those records that are equal to the phone number. Otherwise it shows also those who ends with the searched phone number digits.

Open internet explorer windows: Defines, should the general action settings for opening CRM entities and Phone Call activities by also applied for internal incoming or internal outgoing calls.



EXTERNAL INCOMING CALLS:

| External Incoming Calls | External Incoming Calls | | | | |
|--|-------------------------|----------------------|--|--|--|
| 🔽 Open Entity | | | | | |
| 🗖 Open new 🛛 Contact | if caller is unknown | | | | |
| | | | | | |
| Open phone call activity | For unrecognized | For personal numbers | | | |
| Generate new phone call activity (and always store it) | | | | | |
| Only show new phone call activity | | | | | |

- Open Entity: Open the Entity in CRM that contains incoming caller data.
- **Open Contact/Account on call:** Defines whether a CRM record that contains the number that is calling in should be opened automatically or not.
- **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.
 - **For unrecognized**: Phone Call Activity will open always when the incoming call is from an unknown number, which is not stored under any contact in our CRM.
 - **For personal numbers:** Phone Call Activity will open always when the incoming call comes from a known contact in our CRM.

EXTERNAL OUTGOING CALLS:



- Open Entity: Open the Entity in CRM that contains data from called target.
- **Open phone call activity**: if you are caller and the called participant 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.



• For personal numbers: Phone Call Activity will open always when the outgoing call goes to a known contact in our CRM.

INTERNAL BROWSER POPUP STYLE

TelephoneIntegration provides the possibility to automatically open CRM records and a new phonecall activity in separate Internet Explorer windows. Users can define the order and position of the CRM record-window and the phone-call-activity-window.

Open the TelephoneIntegration setup with a right-click on the TI-icon located in the taskbar on the bottom of your desktop. Within the setup, chose the "Behavior"-tab and go to the "Internet Browser Popup Style"-section (see screenshot below).

Here you have several positioning-options (left to right, up to down, overlapping) and order-options (show entity first, show phone call activity first). Select your favorite positioning- and order-option. Changes are adopted immediately with the next call.



Screenshot: "Internet Browser Popup Style"-section within TelephoneIntegration setup

| | om2013/Contoso/main.aspx?etti-phonecal&pagetype= 🌶 | 💌 🤧 🛺 Phone Call: New P | hone Call × | | Au http://cm20 | 113/Contoso/Insin.aspir?etncontact@pagetyp | e-er P 💌 🔩 🚂 Contact: Christian Terrek 🗙 | |
|---|---|--------------------------|----------------------------|-------------------|--|--|--|----------------------|
| ili v mr ∣ New | Phone Call | | \oplus | CRM System // 🗘 ? | 🚜 🤟 🍙 SALES | - Contacts 🛛 - Christian Ternel | (• | CRM System 1 Contose |
| PHONE CALL : INFO | K COMPLETE 🔄 FORM 🔊 POWER SEARCH | | | ↑ ↓ ज्ञ | + NEW C DEACTIVA | ate 42 connect : ≁ ⊡4 add to № | MARKETING LIST - 🚑 ASSIGN | र र ज |
| New Ph | none Call | | | | Chris | stian Ternek | | Owner* CRM System |
| Phone Call | | | | | Summary | | | ^ |
| Call From* Call To* Subject* | & CRM System Orisitan Terrok | Direction | 00034316680880 Outgoing | | CONTACT INFORMA Full Name* Job Tifle Company Name Email Business Phone Mobile Phone Fas Preferred Method of Address | IION Christian Ternek Product Manager <u>iiii miscen addens com</u> christian Isrnek Greacene addens.o -34315680880 | POSTS ACTIVITIES NOTIES Entry pair Arev Ref Auto point Dare points Christian Ternek Constact Center By (CM System. Constant Center By (CM System. Today \$30(6/2013 11:29 PM | Poer |
| Regarding Owner [®] Duration Duration Category | BB Christian Ternek 3 Christian Ternek 30 minutes | Priority Sub-Category | Normal | | or Autor | AND | | |
| Open | | | | | Active | | | H |

Screenshot: CRM record-window and phone-call-activity-window shown left to right



| Microsoft Dyna | imics CRM 🗸 🏦 SALES 🖌 Contacts 🖌 Christian Terr | nek v | | | | (+) Create | CRM System |
|---------------------------|--|---|--------------------------------------|----------------|------------------------|---------------------|----------------------|
| CRM for Outlook S | iee how CRM for Outlook makes you even more productive. Get CRM for Outloo | k | | | | | |
| + NEW 🗟 DEACTI | IVATE 🖧 CONNECT 👻 📴 ADD TO MARKETING LIST 흌& ASSIGN | | | | | | Ϋ Ψ |
| Chr | ristian Ternek | | | | | | Owner* CRM System |
| Summary | | | | | | | |
| CONTACT INFORMAT | ION | POSTS ACTIVITIES NOTES | | | Company | | |
| Full Name* | Christian Ternek | Enter post here | | POST | mscrm-addons.com | | |
| Job Title Company Name | Product Manager | Both Auto posts User posts | | | Recent Cases | | + = |
| Email | christian.ternek@mscrm-addons.com | Christian Ternek Contact: Created By CRM System. | | | Case Title | Priority 🛧 Status 🛧 | |
| Business Phone | +34316680880 | On Christian Ternek's wall | | | No Case records found. | | |
| Makile Okone | rnek - Microsoft Dynamics CRM - Windows Internet Explorer | Today 10/6/2013 11:39 PM | | | | | |
| | m2013/Contoso/main.aspx?etn=contactSpagetype=entityrecordbid=%780418ba2e | -1b2f-e311-9e9f-00155dc8ae23%7D#212540163 | P 🛃 5 Mc Contact: Christian Ternek 🗙 | | | | <u>∩</u> ☆ |
| Microsoft Dyna | amics CRM 🗸 🏠 SALES 🗸 Contacts 🖌 Christian Ter | mek • | | | | () Create | CRM System 📈 🗘 |
| + NEW 🔓 DEACT | tivate 📲 connect 👻 📴 add to marketing list 🚔 assign | | | | | | ή ψ |
| | | | | | | | |
| CONTA | | | | | | | |
| Chi | ristian Ternek | | | | | | Owner* CRM System |
| | | | | | | | |
| Summary | | | | | | | |
| CONTACT INFORMAT | | POSTS ACTIVITIES NOTES | | | Company | | |
| Full Name* | Christian Ternek | Enter past here | | POST | m | | |
| Job Title Company Name | Product Manager | Both Auto posts User posts | | | Recent Cases | | + 🗆 |
| Email | christian.ternek@mscrm-addons.com | Christian Ternek Contact: Created Ro CRM Surtem | | LIKE REPLY 🗙 | Case Title | Priority 🛧 Status 🛧 | |
| 4 | | | m | | | | • |

Screenshot: CRM record-window and phone-call-activity-window shown up to down

| Microsoft Dynamics CRM 🗸 👘 🕴 SALES 🤸 | Contacts 🛛 🕶 Christian Ternek 🗎 🕶 | (+) Create | CRM System 📈 🌣 |
|--------------------------------------|--|---|---|
| + NEW 🗋 DEACTIVATE 🍇 CONNECT 👻 🖼 AD | TO MARKETING LIST ∰A ASSIGN ↔• | | ↑ ↓ |
| CONTACT Christian Ternek | Contact: Christian Terrek - Horsold Dynamics CM- Dashbards Sales Activity Social Dashbard - Morsold Dynamics CM | 🕀 Create | E CRAN System Contoso Contos Contes Contos Contos Contos Contes Contes Contes Contos Contos Contos |
| Mode Phone Fin | POSTS ACTIVITIES NOTES Contract Derormations Posts ACTIVITIES NOTES Full Tase* Oritikan Farenk Deror part Immer Posts Deb Tile Product Manager Death Aler parts Death Aler parts Posts Deb Tile Oritikan Farenk Death Aler parts Death Aler parts Death Aler parts Death Aler parts Debriese Product Aleranger Debroteeee Product Aleranger Debrieseeeee | Company in mixture address.com Recent Cases Case Title No Case records found. | + ⊟ ety + Sans + |
| Details | SOTTO A READ | Recent Opportunities Topic Star No Opportunity records found. | + E tus ↑ Actual Close Da Ac |

Screenshot: CRM record-window and phone-call-activity-window shown overlapping

- Show entity first: Internet Explorer window will shop up first with the displayed entity.
- Show phone call activity first: Internet Explorer window will show up first with the phone call activity



OTHERS:

| Internet Browser Popup S | ityle | | |
|--------------------------|------------------|---|--|
| C Left to Right | 🔿 Up to Down | Overlapping | |
| | | Show entity first Show phone call activity first | |
| Misc | | | |
| 🗌 Activate debuggin | g | Prevent outgoing call popup | |
| 🔲 Remove leading z | ero on all calls | Prevent incoming call popup | |
| Launch CTI on sys | stem startup | | |
| | | | |

- Activate Debugging: You find the log file under: C:\Programme (x86)\PTM EDV-Systeme GmbH\Telephone Integration Client for MS CRM 2011\log\.
- Removing leading Zero when calling
- Launch CTI on system startup: Start TI automatically, as soon as computer boots.
- **Prevent outgoing call popup**: When choosing this field, Popup-Balloon will not show up by outgoing calls.
- **Prevent incoming call popup**: When choosing this field, Popup-Balloon will not show up by incoming calls.



9.1 Balloon Settings

| Telephone | Integration Setup |
|-----------|---|
| Behaviour | Balloon TAPI SkypeWrapper OCSWrapper Lync2010 Lync2013 Simulation TAPI2 RingC |
| Balloon | settings |
| 20 | Maximum number of displayed call items |
| 0 | Autoclose balloon after inactive timeout (0 for never) |
| 32 | Display main value font size |
| 18 | Display CRM values font size |
| 🔽 Au | toclose balloon after ending the call |
| | Settings |
| Re Re | eturn also entities without a phone number |
| Position | n Settings |
| 300 | Horizontal offset (Default 0) Check Position |
| 100 | Vertical offset (Default 0) |
| Power [| Dialing Check Frequency |
| 0 | time interval (seconds) |
| | |

Balloon section

- Maximum number of displayed call items.
- Auto close balloon after inactive timeout: in minutes. If 0 then this feature is disabled.
- Font size for displaying the CRM main value by incoming or outgoing call.
- Font size for displaying the CRM result values by incoming our outgoing call.
- AutoClose balloon after ending the call.

Search section

• Return also entities that do not contain a phone number.

Position section

- Horizontal offset (Default 0): Spacing between the CTI balloon and the right screen edge.
- Vertical offset (Default 0): Spacing between the CTI balloon and the bottom screen edge.
- [Check Position] use this button to see the final position of CTI balloon.
- In case of using LyncWrapper, 100 is a minimum recommended value, otherwise the balloon and the Lync client notification popup overlap.

Power Dialing Frequency

• Time interval of refreshing the power dialer lists. TelephoneIntegration for MS CRM 2013



9.2 **TAPI**

For using this layer, you need to have a valid TAPI driver installed on your computer. TAPI drivers are PBX dependent, so please contact your PBX vendor for help. Before you proceed to TelephoneIntegration Client setup, please check the installed TAPI driver with our **TAPI Test Tool**, which can be found on our mscrm-addons.com web page under Download / TelephoneIntegration for MS CRM 2011 section.

To be sure, you can also check by calling out over with the windows dialer.exe. If all goes well, then the TAPI driver is working properly and the TelephoneIntegration Client will work fine with it. For users who can access 2 TAPI lines at the same time, they can activate TAPI2 Wrapper.

| Settings ✓ Activate ✓ Default plugin TAPI Status Status: TAPI connected TAPI setup parameters Select a line ✓ Inename AgileVPN ALCATEL - 10 - Dohr M ALCATEL - 12 - Wilheir ALCATEL - 12 - Wilheir ALCATEL - 14 - Alexis ALCATEL - 15 - Ternek ALCATEL - 18 - Christc ALCATEL - 22 - ZENTR ALCATEL - 22 - ZENTR ALCATEL - 23 - Direnek ALCATEL - 24 - Elliott J ALCATEL - 25 - Fax ALCATEL - 27 ALCATEL - 28 - Korose ALCATEL - 30 - Moderr ALCATEL - 31 - ALCATEL - 31 - ALCATEL - 31 - ALCATEL - 32 - Jin Yan ALCATEL - 32 - Jin Yan ALCATEL - 32 - Jin Yan | ehaviour Balloon TAPI Skype | Wrapper OCSWrapper Lync2010 Lyn | nc2013 Simulation TAPI2 RingC |
|---|--|--|-------------------------------|
| Select a line Details Linename | Activate Default plugin TAPI Status Status: TAPI connected | | |
| | Select a line AgileVPN ALCATEL - 10 - Dohr M ALCATEL - 12 - Wilhelr ALCATEL - 12 - Wilhelr ALCATEL - 14 - Alexis ALCATEL - 15 ALCATEL - 16 - Ternek ALCATEL - 18 - Christc ALCATEL - 20 - Ternek ALCATEL - 21 ALCATEL - 22 - ZENTR ALCATEL - 22 - ZENTR ALCATEL - 25 - Fax ALCATEL - 26 - List An ALCATEL - 27 ALCATEL - 28 - Korose ALCATEL - 29 ALCATEL - 30 - Moder ALCATEL - 31 ALCATEL - 33 ALCATEL - 34 - Ofner F | Local loop number: Remove this countrycode: | 0043 |



Settings

- Activate: here you can activate/deactivate TAPI.
- **Default plugin**: make TAPI default plugin (you can only have one default plugin)
- TAPI Status: displays status of the TAPI-connection
- **Status:** displays status of the TAPI-plugin

9.3 Skype Wrapper

| Telephone Integration Setup |
|---|
| Behaviour Balloon TAPI SkypeWrapper OCSWrapper Lync2010 Lync2013 Simulation TAPI2 RingC · · |
| Default plugin |
| Skype Status Status: Skype client is disabled. |
| |

PLUGIN CONFIGURTION

Settings section

- **Activate**: Here you can enable/disable the Skype Plugin. This requires a restart of the application.
- **Default plugin**: Make Skype Plugin to your Default Plugin. Checking this checkbox checks the "Activate"-checkbox. Only one plugin can be the default plugin.

Skype Status section: Shows the current status of the Skype Plugin.

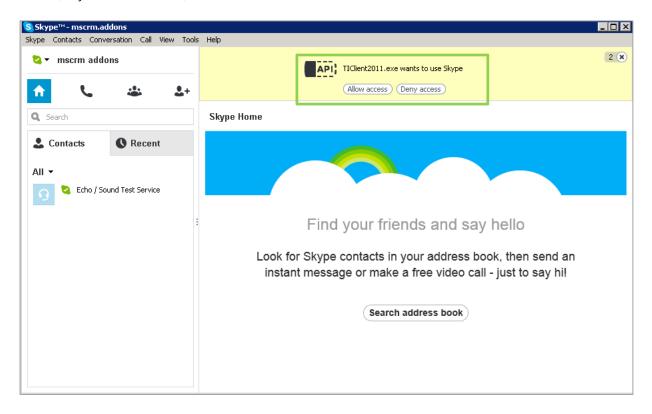
• **Status**: Shows the current status of the Skype Plugin.



9.3.1 Skype Plugin Authorization

Starting TelephoneIntegration

After starting TelephoneIntegration you will get an Authorization Request message from your Skype-Client (only for the first time):



Click on [allow Access] to proceed



Manually Manage API Access Control

You have the opportunity to manually control the access of programs to the Skype client. The setting can be found in "tools" \rightarrow "Options" \rightarrow "Advanced":

1. Click on "Manage other programs' access to Skype".

| Skype™- Options | |
|-------------------|---|
| S General | Advanced settings: Skype updates and external programs |
| A Privacy | ✓ Use Skype to call callto: links on the web ✓ Use Skype to call tel: links on the web |
| i Notifications | Keep Skype in the taskbar while I'm signed in. |
| Calls | Show Skype watermark during calls |
| IM & SMS | Help improve Skype and other Microsoft products and services by automatically sending us periodic reports about Skype's performance on this device, including error reports. The reports may contain your Skype ID and/or Microsoft account ID, but we will not use it to identify you or contact you. Learn More |
| Advanced | |
| Advanced settings | |
| Automatic updates | |
| Sonnection | |
| H Hotkeys | |
| 🔶 Accessibility | |
| | Other things you can do |
| | Manage other programs' access to Skype |
| | Save Cancel |



2. "Manually Manage API Access Control" pops up. Click on "Change" button:

| Skype™ - Manage API Access Control | × |
|--|------------------|
| Manage API Access Control | |
| Name: <u>TIClient2011.exe</u> Publisher: PTM EDV-Systeme GmbH Allowed to use Skype C:\Program Files (x86)\PTM EDV-Systeme Gm Disconnect C:\Program Files (x86)\PTM EDV-Systeme Gm Disconnect | Change Remove |
| | ОК |



3. Choose if you want to allow the program access to the Skype Client.

| Skype™ | M- Manage API Access Control | × |
|--------|--|---|
| ß | Manage API Access Control | |
| | Another program is trying to access Skype. This program is not known to Skype and may be a potential security risk. | |
| | Name: <u>TIClient2011.exe</u> Publisher: PTM EDV-Systeme GmbH | |
| | O Allow this program to use Skype. | |
| | ⊙ Do not allow this program to use Skype. | |
| | What does this mean? | |
| | | |
| | | |
| | | |
| | OK Cancel | |



9.4 OSC Wrapper

| Telephone Integration Setup | × |
|---------------------------------------|---|
| Behaviour Balloon TAPI SkypeWrapper | OCSWrapper Lync2010 Lync2013 Simulation TAPI2 RingC - |
| External Incoming Calls | |
| C Activate | 5 |
| Default plugin | |
| External Outgoing calls | |
| Status: OCSWrapper Disabled | |
| Configuration Log | |
| | Use currently logged on user |
| Active Directory Logon Name: | pkorosec |
| Active Directory Password: | |
| Domain: | ptm-edv.at |
| Communications Server or Pool: | OCS.ptm-edv.at |
| Transport Type: | O TCP O TLS |
| User SIP URI: * sip: | peter.korosek@ptm-edv.at |
| Mediation/remote Call Control Server: | callcontrol.petm-edv.at |
| | Enterprise Voice |
| Line URI: * | tel +4331668088028 |
| Phone Number (w/o Extension): | 28 |
| Phone Extension: * | |
| Audio Input Device: | |
| Audio Output Device: | _ |
| * Required | Load parameters from ADS Test |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| SetupConnection | Save |
| Setupconnection | Save |



All fields marked with an asterisk (*) must be provided with the correct information, otherwise the wrapper will not be able to sign into the OCS system properly.

A corresponding error message is shown if you are missing some values.

The login information should be provided as follows:

- Active Directory Logon Name

 Regular Active Directory username
- Active Directory Password

 Regular Active Directory user password
- Domain

 The Active Directory domain (e.g. mydomain.com)
- Communications Server or Pool
 OCS Frontend server name (e.g. ocs.mydomain.com)
- Transport Type

 Type of connection used by OCS system
- User SIP URI
 - The SIP URI for that user.
 (e.g. 'sip:myFirstname.MySecondName@myDomain.com')
- Mediation/Remote Call Control Server

 Mediation or telephone control server name (e.g. callcontrol.mydomain.com)
- Enterprise Voice
 - A checkbox indicating if the Enterprise Voice configuration is configured for the OCS users. If this is left unchecked, a Remote Call Control scenario is assumed to be set up.
- Line URI
 - The Line URI from the telephony settings of the communications tab in the Active Directory user configuration. Usually formatted similar to this: "tel:+43316123456123" or "tel:+43316123456123;ext=123".
- Phone Number (w/o Extension)
 - The basic telephone number **without** extension (e.g. +43316123456). The extension is usually a user's internal telephone number.
- Extension
 - The extension of the telephone or internal number that should be used to route calls to/from
- Audio Input/output Devices
 - When using the Enterprise Voice feature of OCS, these fields can be used to select the audio devices. This means it is possible to carry out an audio session from TI without having the Office Communicator Client installed. However, this will only work for the OCS calls within the Enterprise Voice environment. The Remote Call Control audio sessions use the configured telephone.



The "Load parameters from AD" button attempts to populate the fields from the Active Directory, making the initial configuration easier. The values obtained from the Active Directory should be checked before saving as this feature only provides a "best-effort" result. The Transport Type and Enterprise Voice configuration are not read from the Active Directory.

The "Test" button allows you to test the connection using the newly entered credentials. It will take a short while to complete the test and will give a success or failure message. During this test, the OCS Wrapper will provide output on the "Log" tab. Any errors or problems that make the connection test fail are reported here (the log is cleared before each test).

Per default the OCS Wrapper is not activated. Activating it will register UccApi.dll and this can potentially cause conflicts with your Lync 2013 clients. Activate this only if you are sure that you do not have Lync2013 client installed on your PC.

| Telephone Integration Setup | ß |
|--|---|
| Behaviour Balloon SkypeWrapper OCSWrapper TAPI Incoming Calls Image: Construction of the state of t | |
| Configuration Log | |
| OCSWrapper - Config] OCSWrapper - Manager] Platform object initialised. OCSWrapper - Config] OCSWrapper - Manager] Enable Tracing OCSWrapper - Config] OCSWrapper - Manager] Enable Tracing OCSWrapper - Config] OCSWrapper] Create Platform OCSWrapper - Config] OCSWrapper] OCSWrapper] Create Login Session OCSWrapper - Config] OCSWrapper - Manager] Starting Login OCSWrapper - Config] OCSWrapper - Manager] Starting Login OCSWrapper - Config] OCSWrapper - Manager] Create EndPoint OCSWrapper - Config] OCSWrapper - Manager] EndPoint Set Server OCSWrapper - Config] OCSWrapper - Manager] EndPoint Authetification Mode OCSWrapper - Config] OCSWrapper - Manager] EndPoint Authetification Mode OCSWrapper - Config] OCSWrapper - Manager] EndPoint Authetification Mode OCSWrapper - Config] OCSWrapper - Manager] EndPoint CocSWrapper | |
| SetupConnection Save | |

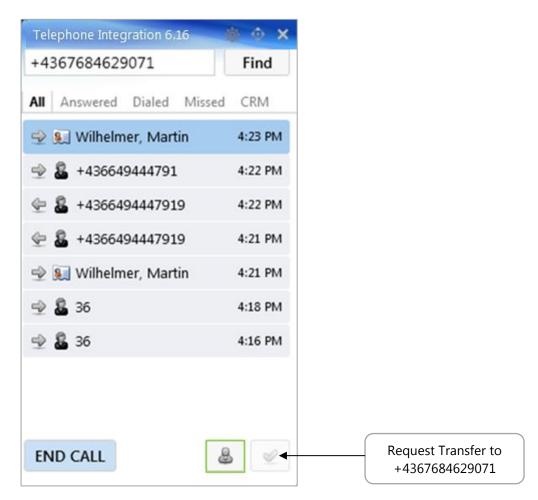


9.4.1 OCS Transfer Call

Transferring the call

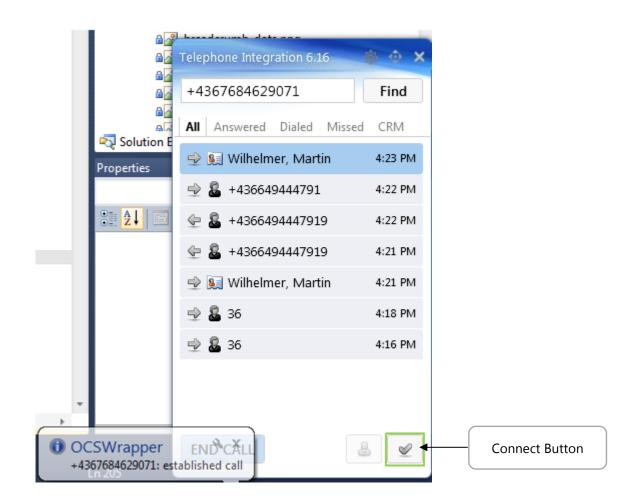
After accepting or initiating an audio call, you have the possibility, to transfer the existing active call to a third party.

Type in a phone number and a new button will become visible in the bottom-right corner.



By clicking on the button, a new call is being established from you to the third participant +4367684629071. After the third party participant accepts your consulting call, you receive notification about it and a new visible button (see next page). You can use that functionality for incoming and outgoing calls.





After the third party has agreed to accept the original call, press the Connect button to transfer the initial call to the third party.



9.5 Lync2010 Wrapper

For using the Lync2010 Wrapper, the user has to be logged in in Lync2010 or Lync2013 client. Lync2013 Wrapper works only with Lync2013 clients. <u>Both Lync Wrapper must not be activated at the same time!!!</u>

| | | Lync B | asic | _ | | × |
|----------|--------------------------------|--------|------|---|---|---|
| What's h | appening | today? | | | | |
| | Jin Yar Availabl Set You | | | | | |
| 2 | - | | :::: | | ¢ | • |
| Find som | eone | | | | | ρ |

After that you can activate the Lynch2010 Wrapper

| Telephone Integration Setup |
|---|
| Behaviour Balloon TAPI SkypeWrapper OCSWrapper Lync2010 Lync2013 Simulation TAPI2 RingC |
| Settings |
| |
| Default plugin |
| Lync Status |
| Status: not initialized |
| Lync Chat Integration |
| Activate chat functionality |
| 500 🕂 Time delay for docking the conversation window [ms] |
| Misc |
| Set presence as busy during call |
| |
| |
| |
| |



Settings (Section)

- **Activate**: Here you can activate/deactivate the Lync2010 Wrapper plugin that has a reference to your installed and signed-in Microsoft Lync client. This requires a restart of the application.
- **Default plugin**: Make Lync2010 Wrapper plugin to your default plugin. Checking this checkbox checks the "Activate"-checkbox. Only one plugin can be the default plugin.

Lync Status (Section)

• **Status**: Shows the current status of the Lync Plugin.

Lync Chat Integration (Section)

- **Activate**: Here you can activate/deactivate LyncChat window where all InstantMessage conversations are tabbed. LyncChat window cannot be closed unless you deactivate it.
- **Time delay for docking**: Sometimes the Lync conversation window is not yet ready to be docked into our LyncChat window and the conversation window appears as minimized. For that purpose a user can set an amount of milliseconds to delay that action.



9.5.1 Lynch Transfer Call

Having a connected call, you can transfer that call to a third party. For this you use the Transfer Call button (see picture)

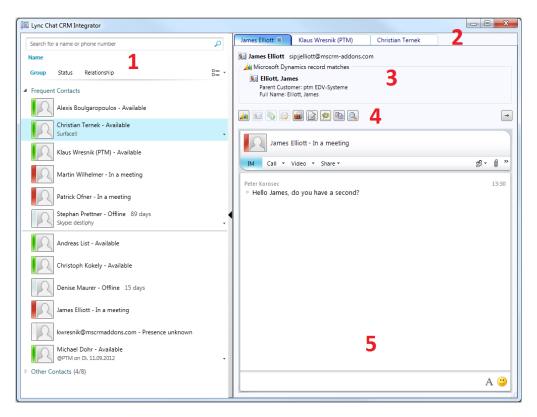
| Telephone Integration 6.16 +4331668088037 | ji ⊕ × | The third party to whom we want to transfer the current |
|--|--------------|---|
| | lissed CRM | active session. |
| 😔 🔙 Elliott, Thomas | 9:56 AM | Current active call we want to |
| 🔄 💈 Foo Bar | 9:50 AM | transfer on. |
| ≚ 🔱 Foo Bar | Mon, 7:16 PM | |
| 👳 🚂 Elliott, Thomas | Mon, 4:50 PM | |
| 🔄 島 Natasha Mayer | Mon, 4:21 PM | |
| 🔄 🚨 +4938795488732 | Mon, 4:20 PM | |
| 🔄 🚂 Elliott, Thomas | Mon, 3:55 PM | |
| 🔿 🚨 +38641967600 | Mon, 3:28 PM | |
| 👳 🚨 +38641967600 | Mon, 3:27 PM | |
| END CALL | Ŷ | Transfer call button |

After pressing the [Transfer Call] button, you are no longer in the call session. The original call was transferred to the third party participant +4331668088037.



9.5.2 LyncChat

The Lync Chat functionality allows you to have all your InstantMessage conversations collected on one tab. Based on the sip address of the remote participant you can see its correspondent CRM record (Contact, Lead, Account...)



The LyncChat window is divided into five logical sections.

First section represents Lync client control.

Second section shows all conversations tabs.

Third section shows CRM information for this lync contact.

Fourth section contains CRM related operations like:

- Open CRM record in IE browser
- Create new Contact, Lead or Account based on this lync contact.
- Create new Case based on this lync contact.
- Create new Letter activity based on this lync contact and the chat content.
- Create new Chat activity based on this CRM record and the chat content.
- Chat activity entity is generated with TI Server part v5.28 upwards.
- Copy chat content to clipboard.

Fifth section contains a docked lync conversation window.



9.6 Lync2013 Wrapper

For using the Lync2013 Wrapper, the user has to be logged in Lync2013 client. Lync2013 Wrapper works only with Lync2013 clients. Both Lync Wrapper must not be activated at the same time!!!

| L | | Lync B | lasic | _ | | × |
|-----------|--------------------------------|--------|-------|---|---|---|
| What's h | appening | today? | | | | |
| 3 | Jin Yar Availabl Set You | | | | | |
| 2 | -,, | | :::: | | ¢ | • |
| Find some | eone | | | | | ρ |

After that you can activate the Lync2013 Wrapper:

| Celephone Integration Setup | × |
|---|-------------------------------------|
| Behaviour Balloon TAPI SkypeWrapper OCSWrapper Lync2010 | Lync2013 Simulation TAPI2 RingC + + |
| Settings | |
| C Activate | |
| Default plugin | |
| | |
| Lync Status | |
| Status: not initialized | |
| Lync Chat Integration | |
| Activated | |
| Misc | |
| Set presence as busy during call | |
| | |
| | |

Settings (Section)

- **Activate**: Here you can activate/deactivate the Lync2013 Wrapper plugin that has a reference to your installed and signed-in Microsoft Lync2013 client. This requires a restart of the application.
- **Default plugin**: Make Lync2013 Wrapper plugin to your default plugin. Checking this checkbox checks the "Activate"-checkbox. Only one plugin can be the default plugin.

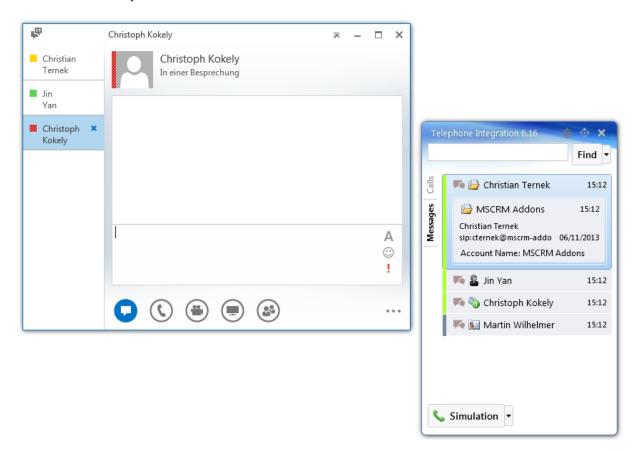


Lync Status (Section)

• Status: Shows the current status of the Lync Plugin.

Lync Chat Integration (Section)

• **Activate**: always activated.



Lync2013 Wrapper keeps track of every Lync2013 conversation window, where every Lync participant is linked with the correspondent CRM record, based on its Lync SIP address. CRM field that contains Lync SIP address needs to be configured as phone field.



9.7 Simulation

📕 Simulator

Telephone Integration - Simulate Calls

Phonenumber 12345678

number and hit "Call In". To end the call select "Hang up"

To simulate an incoming call to CTI client, you can use the Simulation Wrapper by pressing the Simulator button. For a simulation purposes you do not need to have any other wrapper activated.

| Telephone Integration Setup | × |
|--|------------------------|
| Behaviour Balloon TAPI SkypeWrapper OCSWrapper Lync2010 Lync2013 | Simulation TAPI2 RingC |
| Settings | |
| ✓ Activate | |
| | |
| Default plugin | 1 |
| Sim Status | |
| | |
| Status: Ready | Simulator |
| | |
| | |
| | |

•

合 Hang up

Enter a phone number to simulate an incoming call.

This is the Telephone simulation. To simulate an incoming call, enter a

🔇 Call In

| | Telephone Integration 6.16 INCOMING CALL | <u>⊜</u> |
|-------|---|----------|
| | 12345678 12345678 | |
| | | |
| ter a | | |
| • | | |
| g up | ANSWER | DECLINE |



You can also simulate an <u>outgoing</u> call through our CTI client. Press the Simulation call button for this purpose.

| Tele | phone Integration 6.16 👘 | Φ× |
|----------|--|------------|
| | | Find 🔻 |
| Calls | All Answered Dialed Missed | CRM |
| Messages | Image: Second system 00:45 O123456789 23/04/2014 | 10:52 ₹ |
| | ≚ 🚨 123456789 | 10:24 |
| | 🔄 🚨 28 | 12:28 |
| | 🛎 🚨 54321 | 13:47 |
| | 🛎 🚨 5454654 | 13:46 |
| | 🔿 🔚 Korosec, Peter | 13:42 |
| | 🔿 🔚 Korosec, Peter | 13:41 |
| | 🔄 🔚 Kokely, Christoph | 09:57 |
| | 🔄 🚨 16 | 09:35 |
| ſ | END CALL | |

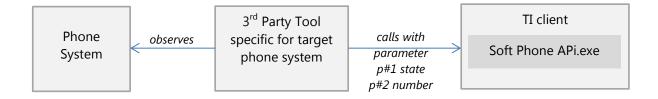


9.8 RingCentral Wrapper

| alloon TAPI SkypeWrapper OCSWrapper Lync2010 Lync2013 Simulation TAPI2 RingCentral SDK Settings Activate Default plugin RingCentral Status Status: Ready User Settings Username: N/A Password: Digital Line: N/A Prompt: N/A | ephone Integration Setup | |
|---|------------------------------------|---|
| ✓ Activate ▲ Default plugin RingCentral Status Status: Ready User Settings Username: N/A Password: *** Digital Line: N/A Extension: N/A Prompt: | alloon TAPI SkypeWrapper OCSWrappe | er Lync2010 Lync2013 Simulation TAPI2 RingCentral SDK |
| Default plugin RingCentral Status Status: Ready User Settings Username: N/A Password: *** Digital Line: N/A Extension: N/A Prompt: | Settings | |
| RingCentral Status Status: Ready User Settings Username: N/A Password: T Digital Line: N/A Extension: N/A Prompt: | Activate | |
| Status: Ready User Settings Username: N/A Password: ==== Digital Line: N/A Extension: N/A Prompt: | Default plugin | |
| User Settings Username: VA Password: | RingCentral Status | |
| Username: N/A Password: *** Digital Line: N/A Extension: N/A Prompt: | Status: Ready | |
| N/A Password: *** Digital Line: N/A Extension: N/A Prompt: | User Settings | |
| Password: Digital Line: N/A Extension: N/A Prompt: | | |
| •••• Digital Line: N/A Extension: N/A Prompt: | N/A | |
| Digital Line: N/A Extension: N/A Prompt: | Password: | |
| N/A Extension: N/A Prompt: | *** | |
| Extension: N/A Prompt: | Digital Line: | |
| N/A Prompt: | N/A | |
| Prompt: | Extension: | |
| | N/A | |
| | Prompt: | |
| | N/A | |

RingCentral Wrapper provides a way for 3rd Party tools to control TI client behavior by incoming calls. The control is proceeding with calling the SoftPhoneAPI.exe with the proper parameters. The SoftPhoneAPI.exe is a part of our TI client solution and is placed in the installation path of TI client.

By 3rd Party tool we refer to phone specific softphone that has direct access to user's phone system and is able to monitor the phone call state (offering, connected, disconnected) and to fetch the caller number.





The 3rd party controller can be a softphone which extended configuration can call external applications with parameters. We don't offer 3rd party controller for your phone system. We just provide a possible way to connect your phone system with our TI client addon.

This RingCentral Wrapper is suitable for scenario where you have a XY phone system that offers no suitable TAPI driver, but it offers a customizable softphone that is able to call external applications.

The external call is done like following:

SoftPhoneApi.exe [paramValue1] [paramValue2]

paramValue1 presents the state of the call and paramValue2 the phone number.

The state is represent as

- 0 ... for disconnected
- 1 ... for connected
- 6 ... for offering

Based on these simple values, combinations are possible as well:

- 60 ... for offered call that was disconnected right after
- 61 ... for offered call that was connected immediately after
- 610 ... for offered call that was connected and disconnected right after.

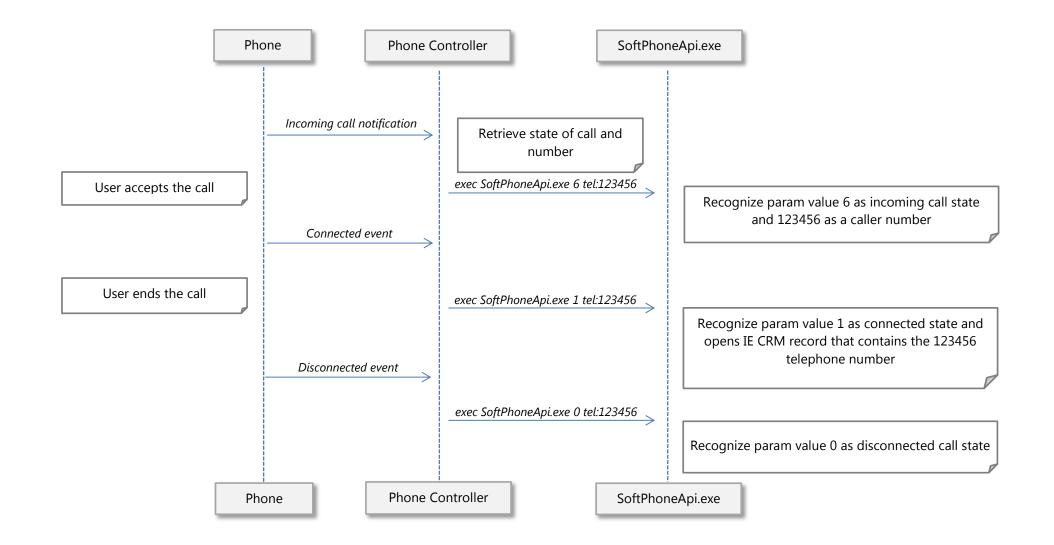
Let's assume that you got an incoming call with a number 123456. Your softphone application will recognize incoming offering state from a number 123456. At his point it should call the SoftPhoneApi.exe with parameter 6 and parameter tel:123456. The prefix tel: can be omitted.

TI client will then try to resolve the number 123456.

If the user accepts the call, the phone controller should call the SoftPhoneApi.exe with parameter 1,, that indicates the connected state. TI client will show the 123456 call as connected call.

If the user agents the call, the phone controller should call the SoftPhoneApi.exe with parameter 0, that indicates the disconnected state. TI client will show the 123456 call as disconnected.







Restrictions:

- RingCentralWrapper is not able to see outgoing calls that are being made from RingCentral softphone.
- RingCentralWrapper is able to initial outgoing calls over TI client balloon.
- RingCentralWrapper is able to end outgoing calls that was made over the TI client balloon.
- RingCentralWraper is not able to end outgoing calls that was not made over the TI client balloon.

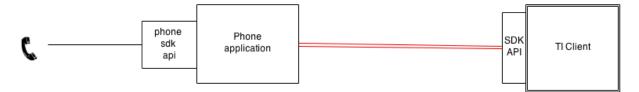
9.9 SDK API Plugin

| Telephone Integration Setup | | × |
|---|-------------|----|
| TAPI SkypeWrapper OCSWrapper Lync2010 Lync2013 Simulation TAPI2 RingCentral | SDK API | ◄► |
| Settings | | |
| C Activate | <u>.</u> ?? | |
| Default plugin | 8 2- | |
| SDK API Status | | |
| Status: Ready | | |
| | | |
| | | |

SDK API plugin enables the connection between TelephoneIntegration client and a .NET application that can communicate with a specific phone device based on its specific SDK with basic phone commands:

- dialing
- answering
- ending the call

It allows third-party agents to interact with TelephoneIntegration Client.



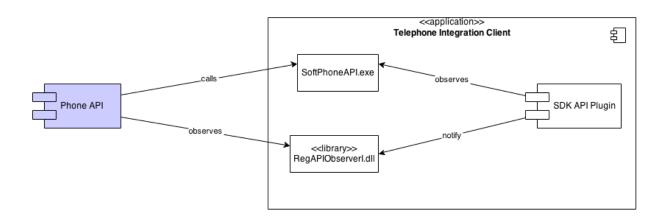
This plugin addresses the following question from users:

"I have a phone system for which there are no TAPI drivers, but I have a SDK .net API that enables me to connect to my phone device and control it. Is there a way that I can connect it to your TelephoneIntegration Client?"

And the answer is yes, but a small amount of programming skills is required.

TelephoneIntegration for MS CRM 2013





The Phone API (left) component is not a part of TelephoneIntegration Client. It is phone specific application that must be able of two things:

- to control state of phone calls on the specific phone and pass it to TI client.
 - Over SoftPhoneAPI.exe with proper parameters
- to observe which commands the user triggers over the TI client and pass those to the specific phones
 - Over .net RegAPIObserver.dll library

Whatever happens on the phone device (ringing, dialing, connected or disconnected state), the Phone API recognizes it and pass this information through *SoftPhoneAPI.exe* to TelephoneIntegration client. Whatever command (dial, answer or hang up) the user presses on the TelephoneIntegration Clients surface, Phone API can observe over the RegAPIObserver.dll library. The RegAPIObserver.dll library contains *CTICommandEvent* that hold an information about a command that was executed on the TI client.

Below is a code sample that needs to be integrated into Phone API application to observe commands on TI client side. This is addressed also as a direction from TI client to the specific phone.

First a reference to RegAPIObserver.dll needs to be added. This DLL library remains in the INSTALLATION path of TI client.

Then we can register to CTICommandEvents.

```
PTM.RegAPIObserver.Observer.SingeInstance.CTICommandEvent + = CTICommandEventHandler;
```

And the handler method that should contain proper actions based on the command info.



```
static void CTICommandEventHandler(object sender, TICommandEvent data)
       {
            System.Console.WriteLine(sender.ToString() + ": command: "
                + data.RequestedCommand.ToString() + " " + data.RequestedData);
            switch(data.RequestedCommand)
            {
                case EnumCommand.Answer:
                    // happens when user wants to answer incomiong call over TI client
                    // call Answer command your specific phone device
                    // .....
                    break;
                case EnumCommand.Dial:
                    string number = data.RequestedData;
                    // happens when user wants to dial out over TI client
                    // dial number on your specific phone device
                    // ....
                    break;
                case EnumCommand.Drop:
                    // happens when user wants to drop or cancel the call over TI client
                    // call Drop call command on your specific phone device
                    // ....
                    break;
                case EnumCommand.None:
                    break;
                default:
                    break;
           }
       }
```

This covers the direction from TelephoneIntegration client to the specific phone device.

Now the sample of code for the direction from specific phone device to TI client.

Phone API should import he phone specific DLL that enables the application to work with the specific phone device. After it connects to the phone device, the Phone API application should be able to catch the following state events:

- Dialing
- Offering
- Connected
- Disconnected



Based on the state of the phone device, the Phone API should pass this information on by executing the SoftPhoneAPI.exe with following 3 parameters:

SoftPhoneAPI.exe /reg /state:*state /tel:number*

The parameter */reg* is indicating that the ThirdPartyReg plugin is working with this call and not with the RingCentral plugin.

The parameter *number* is the number that is being dialed or offered. It is mandatory

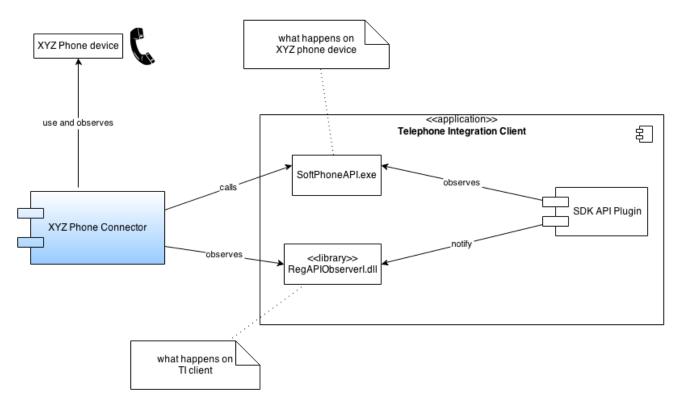
The parameter *state* can be:

- 0 for disconnected state
- 1 for connected state
- 6 for offering state
- 3 for dialing state

Also can there be combinations of it like:

- 61 for offered call that is immediately accepted
- 60 for offered call that is immediately rejected
- 610 for offered calls that is immediately accepted and ended.
- 31 for dialed call that is immediately answered
- 30 for dialed call that is immediately rejected
- 310 for dialed call that is immediately answered and dropped.

Let assume we have a XYZ phone system and a XYZ SDK API that enables us to write a XYZ Phone Connector.





In case XYZ phone device rings and the caller number is +43.316.680880-28, the XYZ Phone Connector application should execute the SoftPhoneAPI.exe as

>SoftPhoneAPI.exe /reg /state:6 /tel:+4331668088028

The TI client will show the offering state

| Telephone Integration | n 6.16 🐞 💿 🗙 |
|-----------------------------|--------------|
| 00433166 004331668088028 | 8088028 |
| ANSWER | DECLINE |

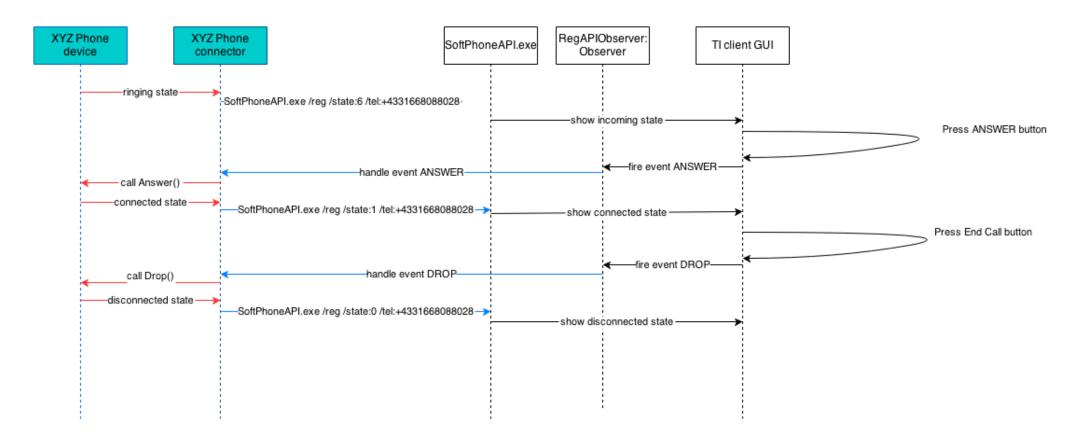
When pressing the [ANSWER] button, the TelephoneIntegration Client would trigger the event CTICommandEvent of class Observer in RegAPIObserver.dll which XYZ Phone connector can catch and pass the ANSWER command to the XZY phone device.

If the user would press the [DECLINE] button, the TelephoneIntegration Client would trigger another CTICommandEvent with command "DROP" and the XYZ Phone connector would catch this and pass it on to XYZ phone device.

If the user wants to dial over 3rd Reg plugin, the TelephoneIntegration Client would trigger the CTICommand Event of class Observer in RegAPIObserver.dll, which the XYZ Phone connector can catch and pass the DIAL command with the number to the XYZ phone device.



Below is a sequence diagram for an **incoming** call that is accepted and then ended through TI client balloon.

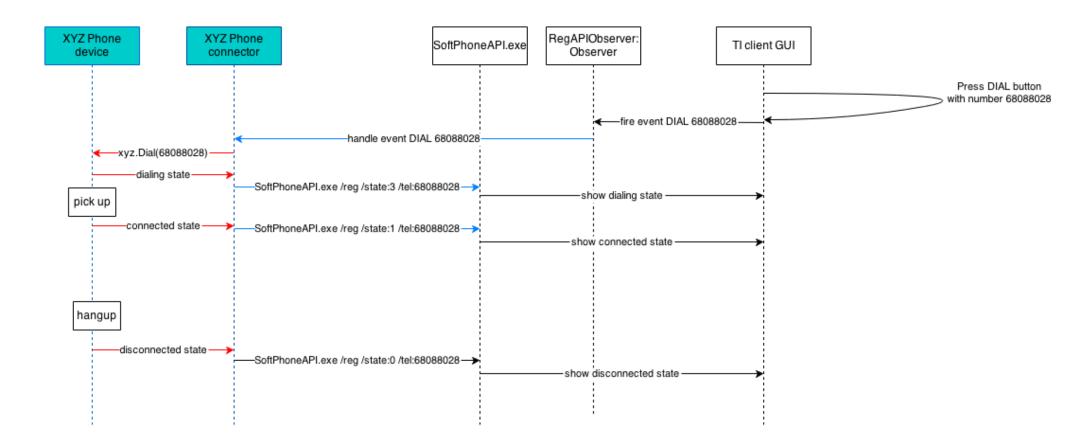


The red arrows are XYZ API specific.

The blue arrows indicate the connection between the XYZ Phone device and the TI Client.



Below is a sequence diagram for an **outgoing** call that is dialed from TI client balloon and then ended through XYZ phone device.





9.10 Interactive Intelligence

| | Telephone Integration Setup × | | | | | | | | | |
|-------|---------------------------------------|--------------------|----------|------------|------------|----------------|---------|--------|-------|-----|
| TAPI | SkypeWrap | oper Lync2010 | Lync2013 | Simulation | TAPI2 | RingCentral | SDK API | InInWr | apper | • • |
| Setti | ngs | | | | | | | | | |
| | Activate | | | | | | | | | |
| |] Default plu | gin | | | | | | | | |
| Statu | JS | | | | | | | | | |
| S | tatus: Not Re | ady | | | | | | | | |
| Deta | iils | | | | | | | | | |
| Log | gin Information | n | | EndPoint | Informatio | on | | | | |
| | Use windows | s login authentica | ition | Server | i3c | cic1.iasdemo.c | om | | | |
| | | | | Station In | formatior | 1 | | | | |
| U | ser Id | james.bond | | Charles | - T | ThisCourse to | | | | |
| Pa | assword | ••••• | | | on Type | ThisCompute | | ~ | | |
| | | | | Statio | n | PC-PERHOP | ER1 | | | |
| | | | | Phon | e# | 44 | | | | |

InInWrapper enables dial out functionality for <u>Interactive Intelligence phone system</u>. The user needs to configure its Interactive Intelligence profile:

- Username and password
- Server name
- Station Type and Name
- Phone number extension

10 Setup Connection

In this section it is possible to change/alter the connection to the CRM server. Note, that in a "CRM Server-Url" field you put in only a server name:port, **without** an organization name.

| Logon information | | | | | | | | |
|---|--------------------------|-----------------------------|----------|---------------------------------------|--|--|--|--|
| Welcome to your CRM Connection setup. Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator | | | | | | | | |
| CRM Connection Advanced Settings Log | | | | | | | | |
| | | | | | | | | |
| Existing Profiles | [HKLM] crm2013 - Contoso |) | • | Manage | | | | |
| Select your Crm Type | | | | | | | | |
| Standard (onPre | mise) | C IFD (Hosted) | C Crm | n Online | | | | |
| CBM Server-Urb | | | | | | | | |
| http:// | 010 | | | | | | | |
| http:// 💌 crm2 | 013 | | | | | | | |
| Authenticated as: | | | | | | | | |
| | | | | | | | | |
| 🔽 Use default Crede | ntials Integrated Secur | ity (CONTOSO\administrator) | | | | | | |
| Username | Don | nain | Password | | | | | |
| , | | , | , | · · · · · · · · · · · · · · · · · · · | | | | |
| | [| Retrieve all Organizations | | | | | | |
| -Organization informatio | n: | | | | | | | |
| Friendly name | Unique name | ServiceURL | | | | | | |
| Contoso | Contoso | Contoso | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| <u> </u> | | | | | | | | |
| Define alternative Pro | file Reset LivelD Ca | iche | ок | Cancel | | | | |
| | | | | | | | | |

11 Reporting and possible Syncing

All data for reporting and syncing is stored in the entity "MSCRM-ADDONS.com CTI Call History Entry".

Always available data:

ptm_duration: Duration of the phonecall in seconds

ptm_outboundcall: Flag indicating if the call is outbound. "True" on outbound, "False" on inbound calls

ptm_phonenumber: Saves the phone number as delivered by the TAPI driver! It might not match the formatting of the number saved with the entity referenced by ptm_entityid & ptm_entitytypecode.

ptm_startdatetime: UTC time of the start of the call, this is the time when the call was initiated.

ptm_userid: CRM User ID of the logged on user on the CTI.

ptm_wasconnected: True if the call was picked up on both end, false if the call as either denied or not picked up at all.

Optional data:

ptm_entityid: If a crm entity is resolved, this field is storing the unique ID for the entity

ptm_entitytypecode: If a crm entity is resolved, this field is storing the typecode for the entity, identifying the entitytype as defined in CRM (e.g. 1 for account) ptm_entityid & ptm_entitytypecode always exists as a pair.

ptm_linkedactivityid: This field is holding the uniqueID of the CRM phone call activity, if the CTI client is setup to always store a phonecall activity. This field is NOT available if you setup the CTI Client to leave the choice of saving a phonecall to the user. This is the only definitive link between the phonecall activity and the CTI Call history item.

Field Templates for internal use:

ptm_lastsyncdatetime: Unused by CTI, offers a standardized field for saving timestamps for syncing operations you might want to do in your CRM. (Sync between the CTI Call History and the actual phone calls is not part of CTI Product, as it is heavily depending on your own demands and workflows)

For synchronizing the phone-call duration with the actual duration as recorded in the TelephoneIntegration history please read our blog article: <u>http://blogs.mscrm-addons.com/post/2013/09/19/Synchronizing-Telephone-Integration-history-with-actual-phonecalls.aspx</u>

12 Power Dialer

Power dialing is offering semi-automated call queues for CTI 2013.

Power dialing is based on CRM Campaign Activities or on a custom *power dialer list* entity.

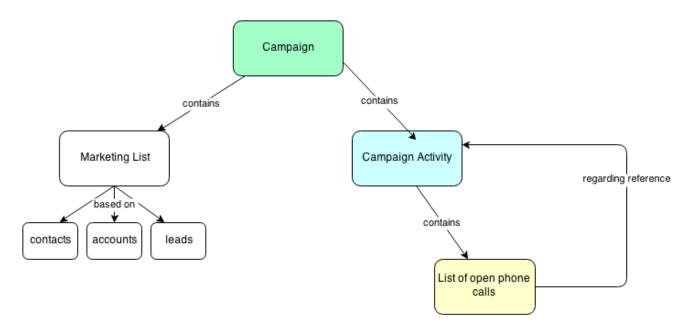


Figure: campaign-activity based power dialing.

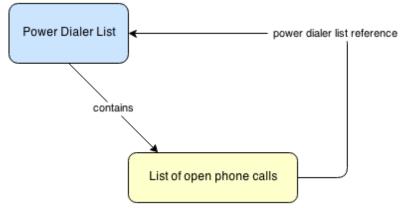


Figure: power dialer list based power dialing.

A server-side integration allows to mark CRM Campaign/Campaign Activities as power dialer lists. The TI client can attach to and process the calls attached to these power dialing lists.

The base for the Power Dialer is the extended CRM Campaign/Campaign Activity entity. The Power Dialer processes the phone calls created in the CRM call-campaign-activity. The term "Power dialing list" refers to a CRM call-campaign-activity, marked as Power Dialing list.

Users participating in the Power Dialer are defined via the ownership of the created phone calls of a CRM call-campaign-activity. This is either a specific user or a team. To assign multiple persons to a Power Dialer, the creation of a team in CRM settings-area is mandatory.

Creating a <u>campaign activity based</u> Power dialer list consists of following steps:

- Crate a marketing list of selected contacts, leads or accounts.
- Create a campaign and add the previously created marketing list.
- Create a campaign activity and distribute it to marketing list members by using the phone channel.

Creating a Power dialer list based on custom power dialer list entity consists of following steps:

• Select contacts, accounts and lead in CRM view and press *Creating Dialing Lists* button in the ribbon.

| Μ | ly Active Contacts 🗸 | | | | 📲 Assign | | |
|---|---|---|--|--|--|---|--|
| Jim (Mari Nan Patri Paul Rene | Name 个 Giynn (sample) ia Campbell (sample) cy Anderson (sample) ick Sands (sample) I Cannon (sample) e Valdes (sample) ert Lyon (sample) | Email someone_i@example.com someone_c@example.com someone_k@example.com someone_k@example.com someone_i@example.com someone_i@example.com | Company Name Coho Winery (sample) Fabrikam, Inc. (sample) Adventure Works (sample) Alpine Ski House (sample) Alpine Ski House (sample) A. Datum Corporation (sa Contoso Pharmaceuticals (| Business Phone 555-0109 555-0103 555-0102 555-0110 555-0107 555-0108 555-0106 | | • | |
| Scot Sidn Susa Susa Thor | tt Konersmann (sample) ley Higa (sample) an Burk (sample) anna Stubberod (sample) mas Andersen (sample) nne McKay (sample) | someone_f@example.com someone_e@example.com someone_l@example.com someone_b@example.com someone_m@example.com | City Power & Light (sample) Blue Yonder Airlines (samp A. Datum Corporation (sa Litware, Inc. (sample) Coho Winery (sample) Fourth Coffee (sample) | 555-0105 555-0104 555-0111 555-0101 555-0112 555-0100 | Import Data Advanced Find Chart Pane Quick Campaign Relationship View New System View Customize Entity | • | |

• Fill out the form and press *Create New* or *Add to existing*.

| TI Pow | verDialingList | × |
|----------------|--|---|
| Use this dialo | g to create a new PowerDialingList, or add new phone calls to an existing. | |
| Subject | asking for purchase | |
| Description | foo bar |] |
| | | |

• A new *power dialer list* record

| New Po | werDialingLi | st | | | |
|----------------------|----------------------|-------------------------|-----------|-----------|----------|
| General | | | | | |
| Name * | New PowerDialingList | Description | | | |
| Owner* | Peter Korosec | Allow Crm Interractio | Yes | | |
| Active | No | Autoschedule | No | | |
| PreProcessing Time § | | PostProcessing Time | | | |
| All Phone Calls 💙 | | | | | + 🗉 |
| Search for records | Q | | | | |
| Subject ↑ | Call From | Call To | Regarding | Direction | Phone Nu |
| asking for purchase | Peter Koros | ec Paul Cannon (sample) | | Outgoing | |
| asking for purchase | Peter Koros | ec Rene Valdes (sample) | | Outgoing | Ū |
| asking for purchase | Peter Koros | ec Robert Lyon (sample) | | Outgoing | |
| 4 | | |] | | • |

• User has to change adopt fields to its needs and then save the changes. Power dialer list record is now ready for using it in clients Power Dialer.

Now the Power Dialing functionality must be enabled in the TI Server Configuration. For details please read the next chapter.

12.1 Server-side Requirements

For using the Power Dialing functionality, the Power Dialing functionality must be enabled in the TI Server configuration. Changing this setting requires a restart of the client application.

The entity type of the recipient of the planned phone call must be included in the settings of Telephone Integration Server Configuration. CTI ignores all entity types that are not enabled in the Telephone Server Configuration.

| orgd3d23ef8: Telephone Integ | | | |
|---|---|--------------|--------------|
| Welcome to the Te | elephoneIntegration So | etup | |
| Use this tool to setup the | general ribbon integration int | to CRM and s | pecify which |
| entities should be search | ed by CTI and which entities sh | ould be enh | anced by |
| adding the Call functiona | lity to its ribbon in CRM | | |
| Crm Ribbon Advanced | | | |
| cinitabbon | | | 1 |
| Call History options —— | | | |
| Organization owned | O User Owne | d | |
| All users in the same | Only the owne | r can | |
| Organization can view the Call history | view the Call hi in CRM | istory | |
| line contribution | | | |
| Lync Chat options | | | [] |
| Account : Save SIP | • | | |
| | | | |
| Contact : Save SIP into | | | |
| Lead : Save SIP into | • | | |
| Development in the second | | | |
| - Power Dialer options | | | |
| Enable | | | |
| | II enhance the CampaignActivty tional fields for the power dialing | | |
| features of mscrm-addo | ns.com CTI | | |
| Dialing from Relations | | | |
| - | O Disable for all users O Client s | side enabled | |
| | an be enabled or disabled for all | | |
| users or left to the clien | t installations to decide on a | | |
| perUser basis | | | |
| | | | |
| 1 | 1 | | |
| Change Co | nfigure Service | ОК | Cancel |

When creating a call-campaign-activity, we have to set following settings:

| General options | | | | |
|--|------------------------|------------|--|--|
| Active | V | | | |
| PD List Name | Power dialing campaing | J activity | | |
| Client Automatism op | tions | | | |
| | tions | | | |
| Client Automatism op Enable Automatic Di Display CRM Forms | | | | |

Please note, that the view shown in the screenshot above is only visible if you use the campaignactivity information form. See next example screenshot:

CAMPAIGN ACTIVITY : INFORMATION 🔻

- Active: The campaign-activity is enabled as Power Dialing list
- **PD List Name**: The name of power dialing list. If none is set, the name of the campaign-activity is taken.
- **Owner**: The user or team who owns the campaign-activity.
- **Enable Automatic Dialing**: The user gets a predefined amount of time for pre-processing the call. When time runs low, the timer blinks red for alerting the user to act. In this preprocessing state, the number is automatically dialing after the predefined time runs out.
- Display CRM Forms: The user has access to the CRM phone-call activity form inside Power Dialer window.
- **PreProcessing Time in seconds**: Set a span in which the user can prepare for the next phone call. If automatic dialing has been enabled, a call will be started after this time has run out.
- **PostProcessing Time in seconds**: Set a span in which the user can finish the post-processing of a call (Writing a summary, triggering further actions).

TI client periodically checks for changes in the CRM campaign-activities and applies the changes to the CTI Client.

12.1.1 Extended Phone Call Entity

New attributes are added to phone-call entity.

- **PDState**: Collection of state values referring to power dialing.
 - Unprocessed
 - Claimed
 - Successful
 - Failed
 - Rescheduled
- **Reschedule**: Define a date and time for the rescheduled phone-call.

12.2 Starting of Power Dialer

TI Client retrieves the server-side setting "UsePowerDialing" on StartUp. If power dialing is enabled, the client checks for updates every minute. If any updates apply to the logged on user, a notification window is displayed.

You can open the Power Dialer overview window by choosing "Power Dialer" in the Application Menu.

| Show Balloon |
|---|
| Call: [] |
| Personal Phone Book History Predictive Dialer Info |
| Drop calls and reset Setup |
| Exit |

A new window with a list of active campaign-activities appears with details for each campaign-activity. This window is referred to as "Available Dialer Preview List".

| ele | ephone Integration - Predictive Diale | r | | | | | | | | |
|-----|--|---------------------------------|------------------|-----|-----------|-------------|------|---------|-----------|----------------|
| oni | nection to a predictive dialer list will disable y | our CTI balloon until you detac | h from the list. | | | | | | | |
| Зап | npaign Activities: | | | | | | | | | |
| | Name | Parent campaign | Owner | All | Processed | Rescheduled | Left | Claimed | Automatic | Display CRM Fo |
| 2 | Check InvokeScript on CrmBrowser | WTF is this campaign | Peter Korosec | 4 | 3 | 0 | 1 | 0 | | |
| 2 | CRM2013 launch follow up A | CRM2013 launch follow up | Peter Korosec | 4 | 0 | 0 | 4 | 0 | | V |
| 5 | pure horror 2013 | WTF is this campaign | Peter Korosec | 4 | 4 | 0 | 0 | 0 | | V |
| | | | | | | | | | | |

- **Name**: The name of the campaign activity
- Parent campaign: The name of the parent campaign
- **Owner**: The owner of the campaign activity
- All: The number of all planned phone calls that belong to the campaign-activity.
- **Processed**: The number of all completed phone calls.
- **Rescheduled**: The number of all rescheduled phone calls. These phone calls are still open.
- Left: The number of all phone calls which have not been completed in this campaign-activity.
- **Claimed**: The number of all claimed phone calls. Claimed means that somebody is processing this phone call in this moment.
- **Automatic**: If automatic dialing is enabled, the presets of preprocessing and postprocessing time are handled via a countdown.
- **CRM Interaction**: If activated, users can directly interact with the planned CRM phone-call activity-form over embedded web controller.
- **First possible Call**: Date of first possible call within a power dialer list. If we have only rescheduled calls, then we take the earliest rescheduled date.
- **Is attached**: Is the user executing this campaign-activity in this moment.

Users can start (attach) to execute only one campaign activity at time. During that time, the default TI balloon is disabled. The calls of a power dialer list are processed in a separate window, known as "Power Dialer Workplace". The window is divided into 4 sections (See image below)

Detaching is possible only if the PDL client is in Pause mode. User can only activate **Pause** mode in preprocessing state.

| Alexy Leonov | А | Preprocessir Press for dialing 123456 | ng B | Ti La | CRM2013 otal calls : 4 eft calls : 3 laimed calls : 1 | launch foll C | ow u | D Pause |
|------------------------------|---------------------------|---|---------|---------------|--|------------------|------|-------------|
| li v 👖 call | 2013 - Online c | ~ | | | | \oplus | × | Ø :? |
| ✓ MARK COMPLETI PHONE CALL ▼ | | CALL 📱 CONVERT T | | email a lini | < | | Υ . | 1 3 |
| call 201 | l3 - Onli | ine custo | mers | | | | | |
| Priority | Due | Stat | tue* | Owner* | | | | |
| Normal | | Ор | | Peter Korosec | | | | |
| 1 | Nexy Leonov 123456 | Op | | | | | | • |
| Normal | ліску Leonov 123456 | | ben | Peter Korosec | | | | • |
| Normal | 123456 | | ben | Peter Korosec | | | | |

Section A shows CRM information about the recipient of the planned phone call activity.

Section B shows the state of processing the phone call. Possible states are

- Pre-processing (user can prepare for the call)
- Active Conversation (during dialing and connected call)
- Post-processing (after ending the call)

Preprocessing state

represents the state before the recipient is called. This time span is used to prepare for that call. Preprocessing state can be attached to a timer.

Active Conversation state

represents the timespan from dialing to finishing the call.

Postprocessing state

represents the state where the call is summarized, e.g. defining the claimed call as successful, failed or reschedule the call to another date. Setting the call as successful or failed, marks the call as completed.

| 🚂 Alexy Leonov | Preprocessing | 00:46 | CRM2013 launch follow u | |
|----------------|-----------------------------|-------|--|--|
| | Press for dialing 123456 | Dial | Total calls : 4 Left calls : 3 Claimed calls : 1 | |

After you have selected one of the three options power dialer saves all user input into the existing call activity, speaks to another, unfinished call as in the preparatory state of the next call.

The time required that a user needs for pre-and post-processing phase of a call will be stored in 'Actual preparation time "or" Actual work time ".

Section C shows statistics about the power dialing list, like the name of power dialing list, the total number of all planned phone calls, the number of still open calls and the number of claimed phone calls.

Section D shows the current call or a feedback option. If "Display CRM Forms" is disabled, the CRM call-form will be replaced by a text-editor, which can be filled in by the users and which is saved as the description of the phone-call activity associated with the actual call.

12.3 Closing of Power Dialer Workplace

For closing (detaching from) the Power Dialer Workplace window, the Power Dialer needs to be in preprocessing state. Closing the window during an active conversation or postprocessing phase is not possible.

After closing the window, the CTI balloon is enabled again.

13 Troubleshooting

Blogs about troubleshooting TI client problems can be found <u>here</u>:

Q: How to generate debug log files?

http://blogs.mscrm-addons.com/post/2011/04/04/How-to-activate-debugging-for-Telephone-Integration-for-MS-CRM-2011.aspx

Q: The TAPI wrapper makes no outgoing / incoming calls <u>http://blogs.mscrm-addons.com/post/2011/11/28/The-TAPI-wrapper-is-not-working-properly.aspx</u>

Q: The Lync / OCS wrapper stop making outgoing calls. http://blogs.mscrm-addons.com/post/2011/11/25/The-Lync-OCS-wrapper-stop-making-outgoingcalls.aspx

Q: How to find fields.xml settings? http://blogs.mscrm-addons.com/post/2011/11/25/How-to-find-the-fieldsxml-settings.aspx

Q: The phone call activity or entity does not open. <u>http://blogs.mscrm-addons.com/post/2011/11/28/By-outgoing-calls-the-Entity-or-PhoneCall-activity-</u> <u>will-not-open-sometimes.aspx</u>

Q: The CTI does not resolve the incoming / outgoing numbers correctly. <u>http://blogs.mscrm-addons.com/post/2012/03/02/CTI-does-not-resolve-phone-number.aspx</u>

Q: Calling out from CRM by pressing Call Number button, does not react. <u>http://blogs.mscrm-addons.com/post/2011/11/28/Calling-out-from-CRM-Entity-by-pressing-Call-Number-button-triggers-no-reaction.aspx</u>

Q: How to use TAPI Test Tool?

http://blogs.mscrm-addons.com/post/2012/03/12/TAPI-Test-Tool.aspx

Q: How does dialing the related CRM-Record work?

http://blogs.mscrm-addons.com/post/2013/03/25/Setting-restrictions-by-dialing-fromrelationships.aspx

Q: How to set restrictions for dialing from a related CRM-record? <u>http://blogs.mscrm-addons.com/post/2013/03/27/How-to-set-restrictions-for-dialing-from-a-related-</u> <u>CRM-record.aspx</u>

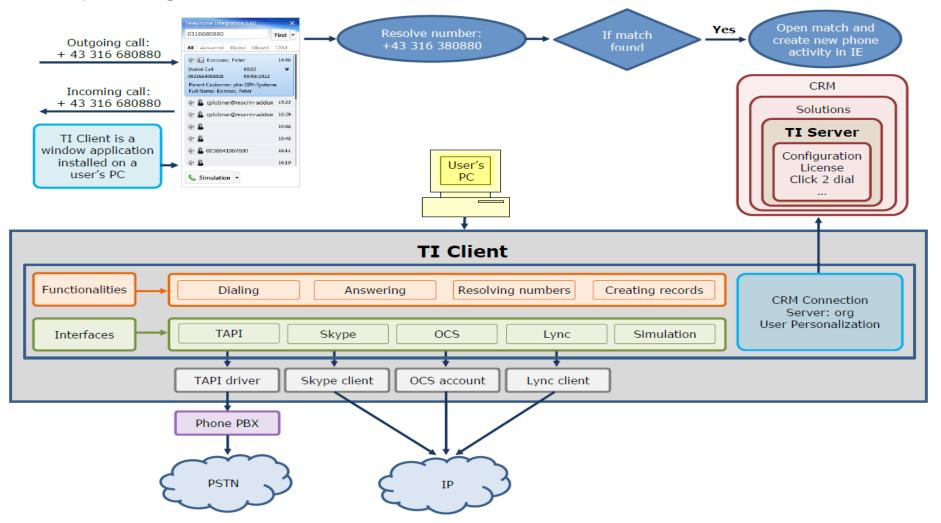
Q: How to rebuild the phone number index table? <u>http://blogs.mscrm-addons.com/post/2013/07/03/How-to-rebuild-phone-number-index-table.aspx</u>

Q: How to synchronize phone-call duration

http://blogs.mscrm-addons.com/post/2013/09/19/Synchronizing-Telephone-Integration-history-withactual-phonecalls.aspx



14 TelephoneIntegration Overview





15 Contact

If you have questions to the product send an email to <u>support@mscrm-addons.com</u> or visit our blog <u>http://blogs.mscrm-addons.com</u>

For shorten the time for solving the problem, it would be most helpful if you provide us with the following information when sending an email.

- The version number of your CTI client. Is it updated with the latest version?
- Which communication layer you use? TAPI, Skype, OCS or Lync?
- The content of file fields.xml.
- The debug log file.

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