



Telephone Integration for Microsoft CRM 4.0 (TI for MS CRM 4) Server

Version 4.0

Implementation Guide
(How to install/uninstall,..)

The content of this document is subject to change without notice.
"Microsoft" and "Microsoft CRM" are registered trademarks of Microsoft Inc.
All other product- and company names mentioned are trademarks of their respectful owners.

Table of Contents

1 INSTALLING OF TI FOR MS CRM 4	2
1.1 INSTALLING	3
2 ADDING/CHANGING THE BUTTON AND SET UP THE TELEPHONE INTEGRATION LOGIC!.....	10
3 CHANGING ONLOAD EVENT	12
4 PER USER LICENSING.....	16
5 CONTACT.....	22

1 Installing of TI for MS CRM 4

Before installing **TI for MS CRM 4**, please read this document and follow the steps carefully.

Intended Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

The installation consists of the following steps:

Follow each of the following steps, to complete the installation:

1. Installing the TI for MS CRM 4.
2. Configuring the ISV.CONFIG.XML

1.1 Installing

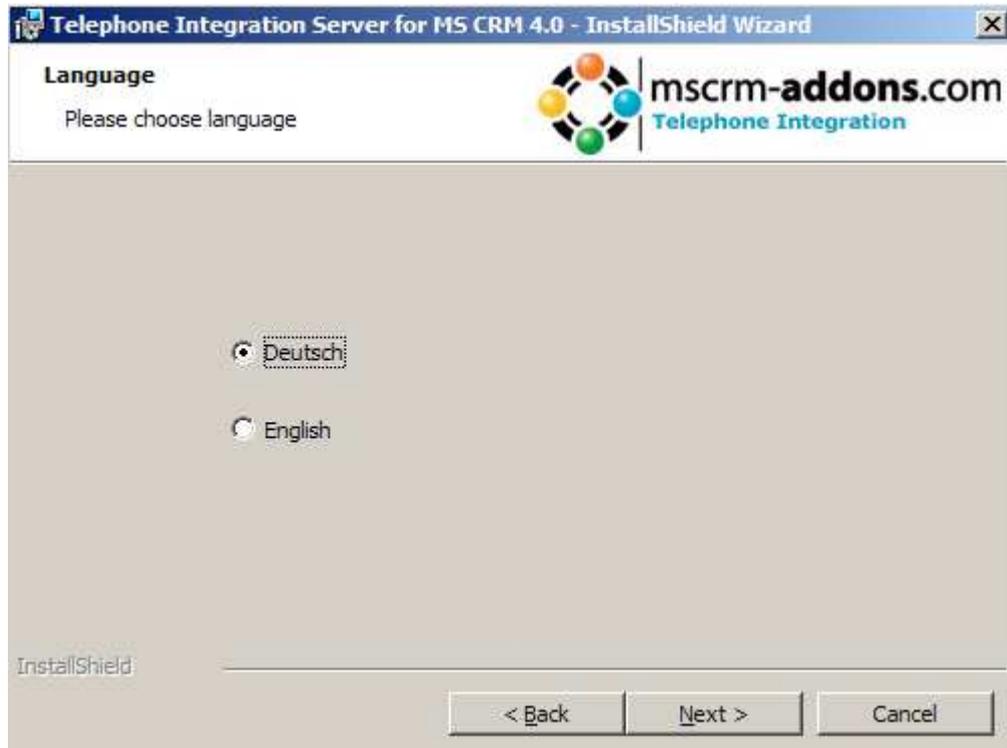
You have to install TI for MS CRM 4 on your server where MS CRM is running.

1. Run the "Telephone Integration Setup.msi" Setup file.
2. You will see following window:



Click Next>

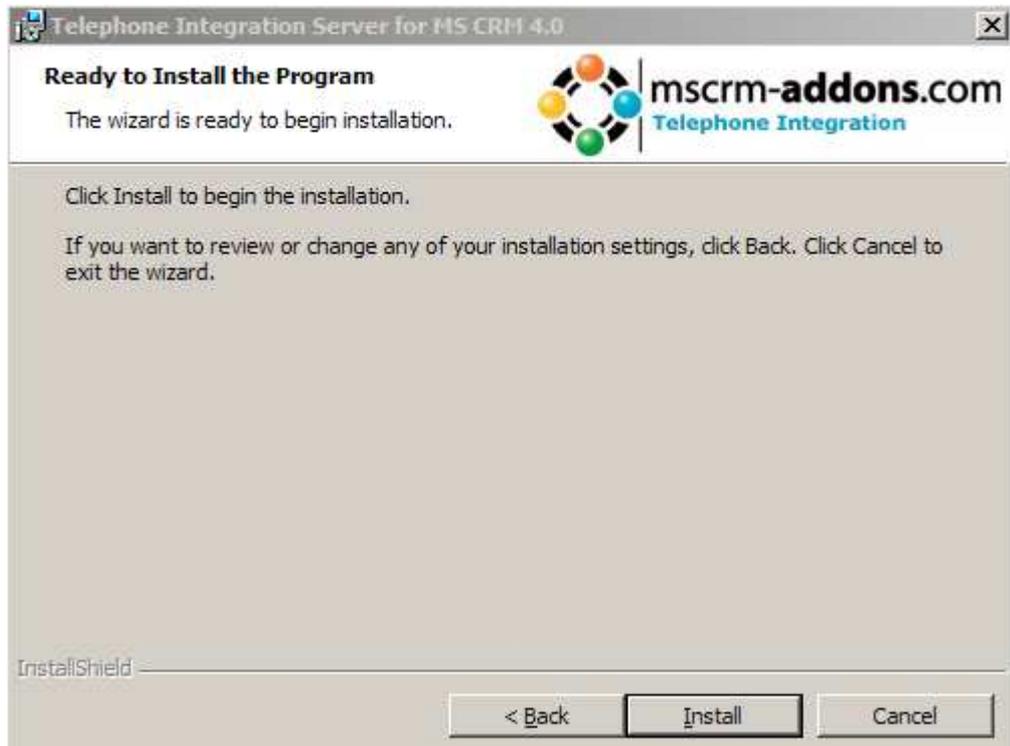
3. Select Language



4. Select a path



5. Confirm Installation



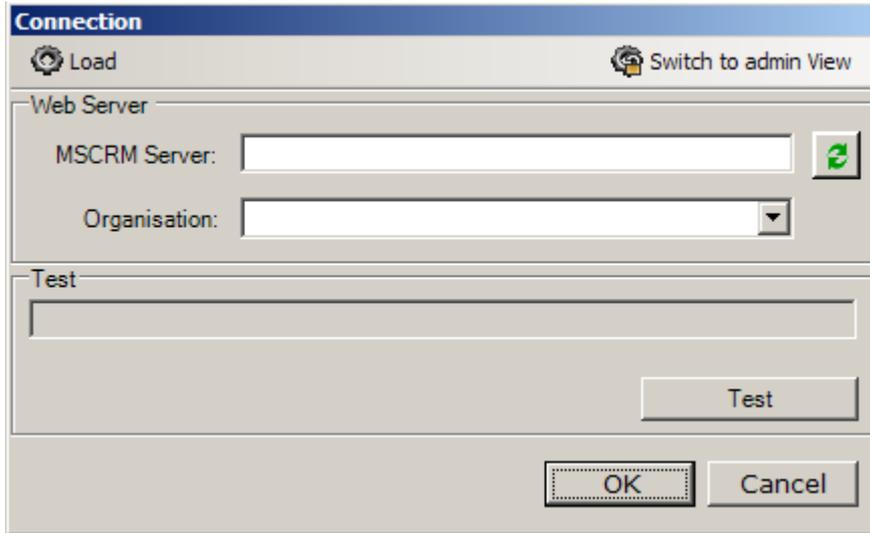
After Click on the Install Button the Installation begins.

6. Serversettings

Here you have to define the settings for the webservices and SQL-server connection.

IMPORTANT: you have to define both, Webservice-settings and SQL-server settings.

7.1 Webservice



The screenshot shows a dialog box titled "Connection". At the top left is a "Load" button with a gear icon, and at the top right is a "Switch to admin View" button with a gear icon. Below these is a "Web Server" section containing two input fields: "MSCRM Server:" followed by a text box and a green refresh icon, and "Organisation:" followed by a dropdown menu. Below the "Web Server" section is a "Test" section with a large empty text area and a "Test" button. At the bottom of the dialog are "OK" and "Cancel" buttons.

Server: the name of your MSCRM-Server witch you use in your Internet Explorer, without the http://.

IMPORTANT: if the port is not standard http-port(80) you have to mention the portnumber as well.

e.g. in our example the servername is *dev-crm4* and CRM-port is *5555*

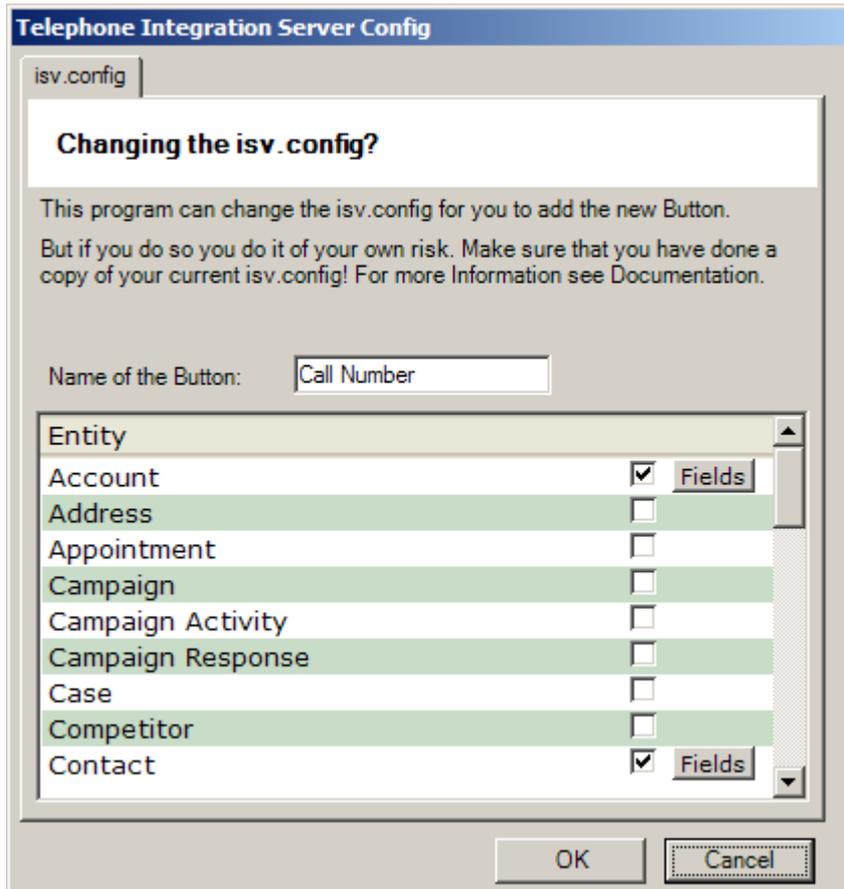
HTTPS: check this box to use https, as you see, a certificate is required.

Test the connection with a click on "Test".

IMPORTANT: The user has to be an existing CRM user.

7. Setting up the ISV.CONFIG.XML

Here you can set if and where you want the new Button (so that you can use OutBoundCall).



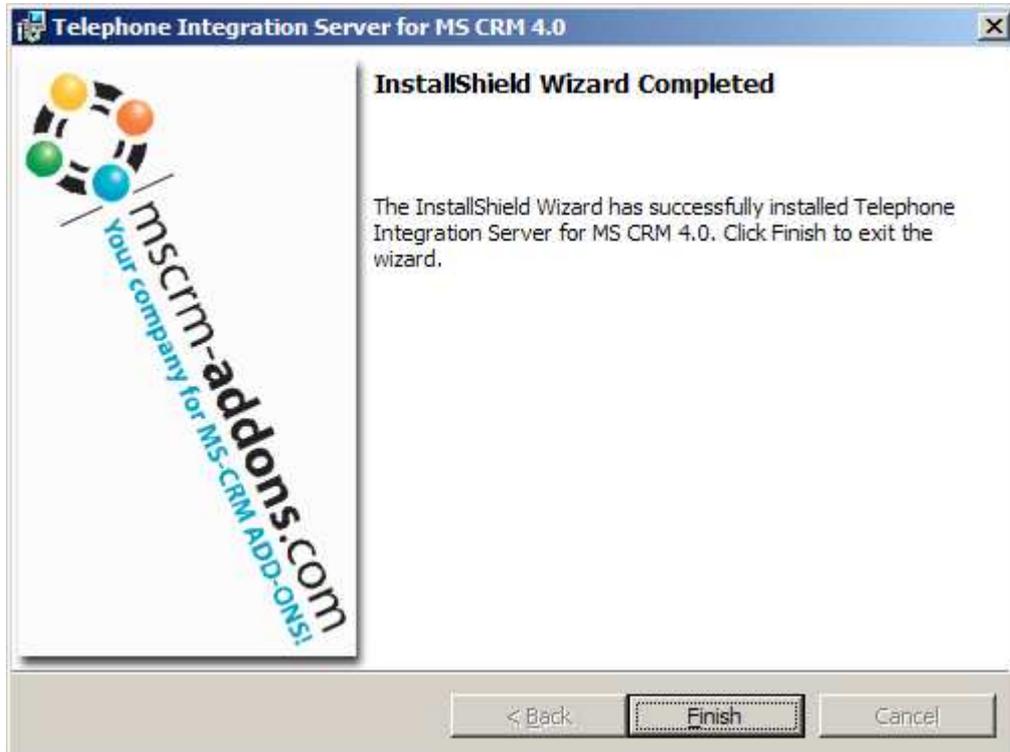
On the first install we add an example XML file to speed up installation. This adds the Button to the following entities:

* Contact * Company * Lead * Phone Call

Please Press OK to accept these settings.

For more Information please see chapter 2.

8. After the installation ended you have to click on the "Finish" button



Result:

Now start MS CRM and open an Contact. Now the new Button should appear.



2 Adding/Changing the Button and set up the Telephone Integration logic!

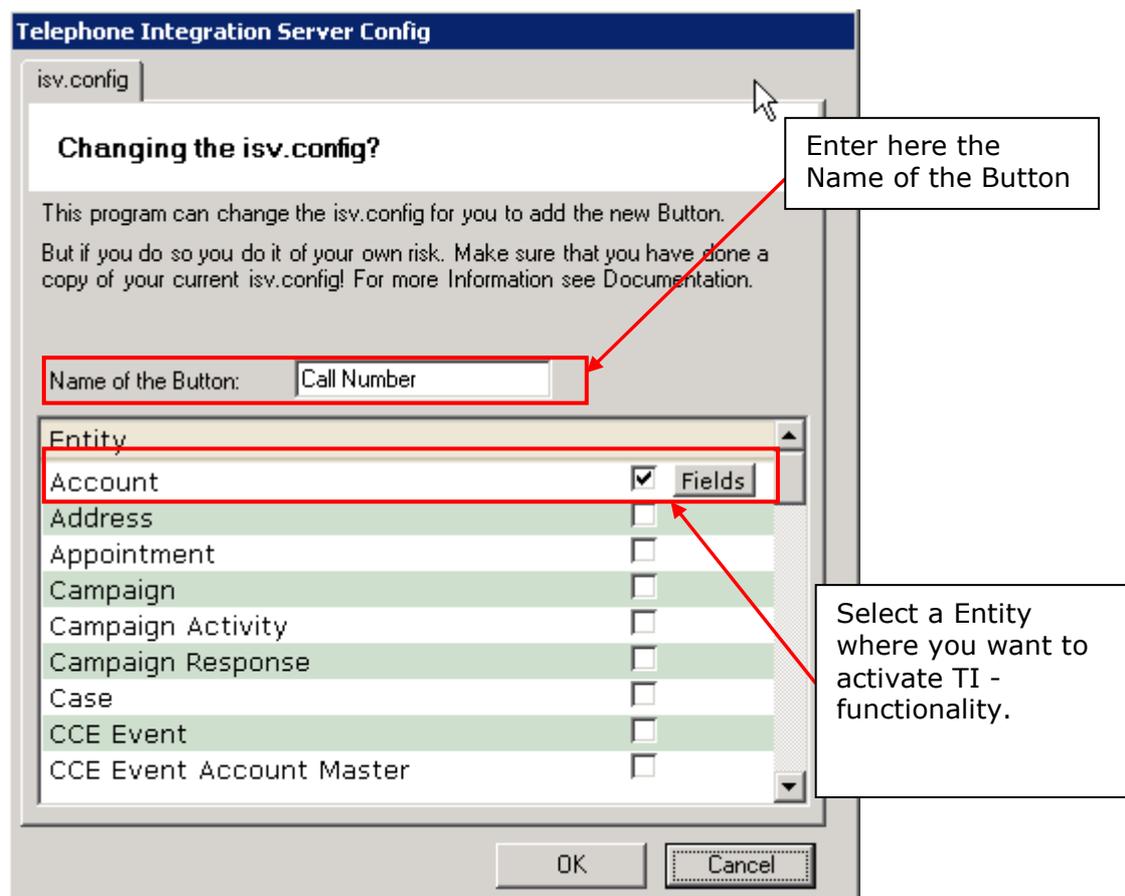
Call the Setup:

[Start] All Programs - *www.MSCRM-ADDONS.com* – Telephone Integration for MS CRM 4 – Telephone Integration Setup

In this Setup you can set in which Entity you want to have the TI-Functionality (to make a outbound call) and you also have to set up which Fields TI shows you and in which Fields the Client should search. So you are able to use any fields and entities you want.

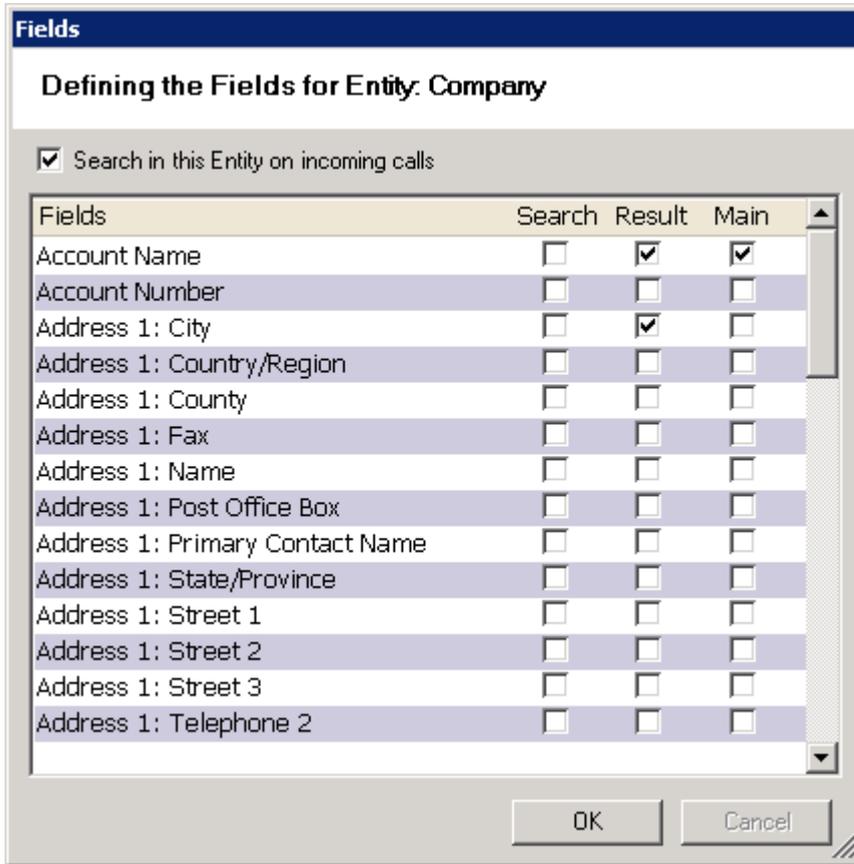
Let's explain this Step by Step.

Now you can change the things...



If you check an Entity the FIELDS-Windows will be automatically opened.

Otherwise you can open it by clicking the [Fields] Button.



Fields

Defining the Fields for Entity: Company

Search in this Entity on incoming calls

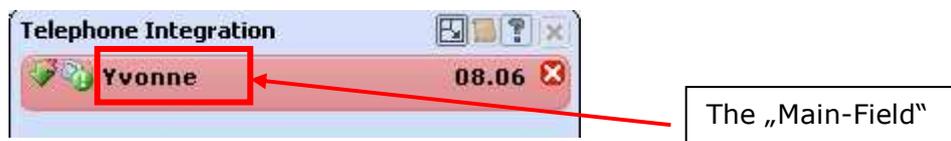
Fields	Search	Result	Main
Account Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: City	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address 1: Country/Region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: County	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: Post Office Box	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: Primary Contact Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: State/Province	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: Street 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: Street 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: Street 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 1: Telephone 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

Search: these are the fields where the client searches in this entity for the incoming number. ("Search with the incoming Number in 'Main Phone' and 'Other Phone' ...)

Result: here you select the result fields, which you want to see as result. (... and show me 'Account Name' and 'City' as result")

Main: this is the Main-Result-Field. TI-Client uses this as headline.



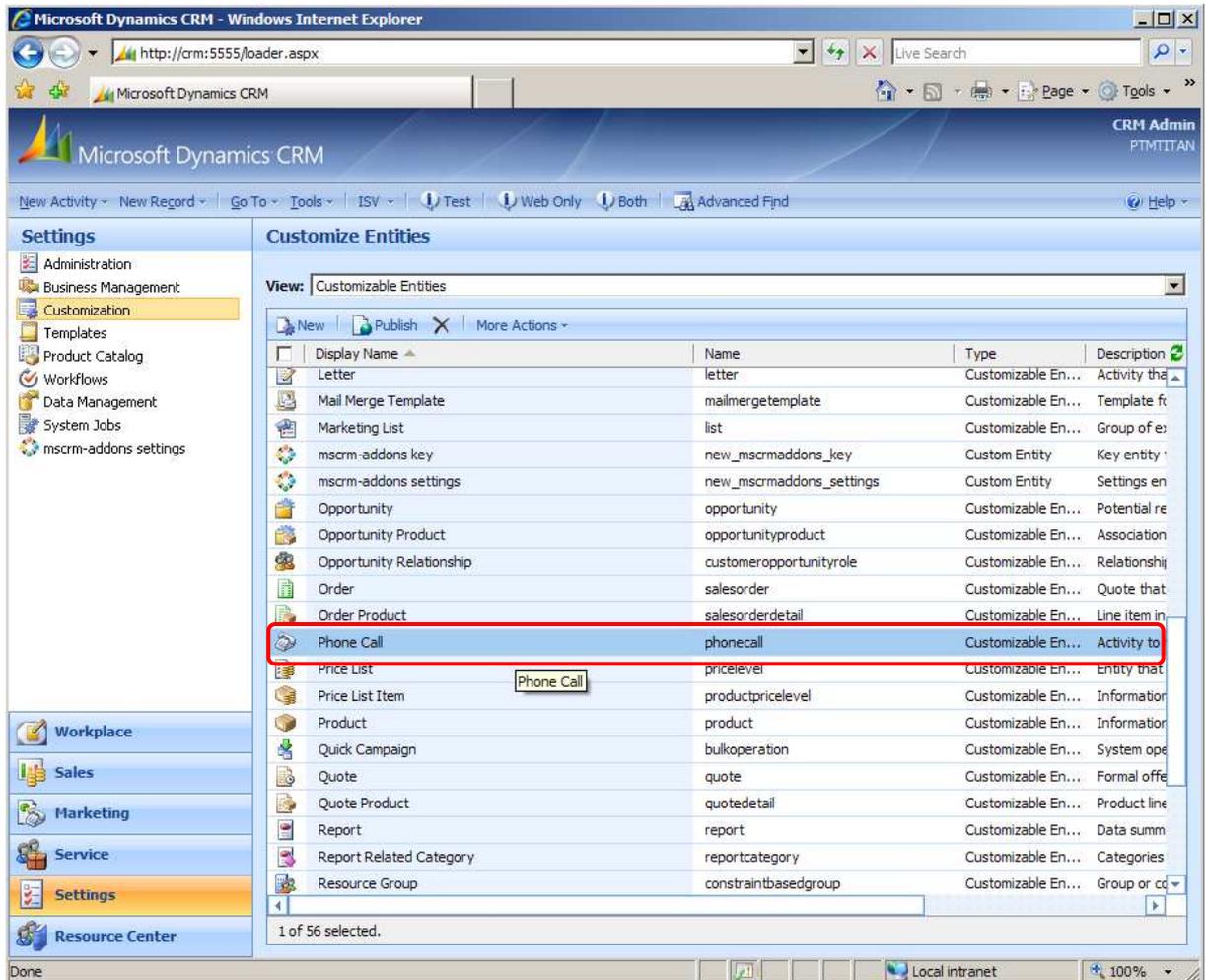
You have to declare at least one Search-, Result- and Main-Field. By pressing OK TI-Setup immediately stores the settings for this Entity!

If there is an incoming Call, the TI Client searches for this Number in each Entity you selected, so more Entities you select, as longer TI needs to search for it.

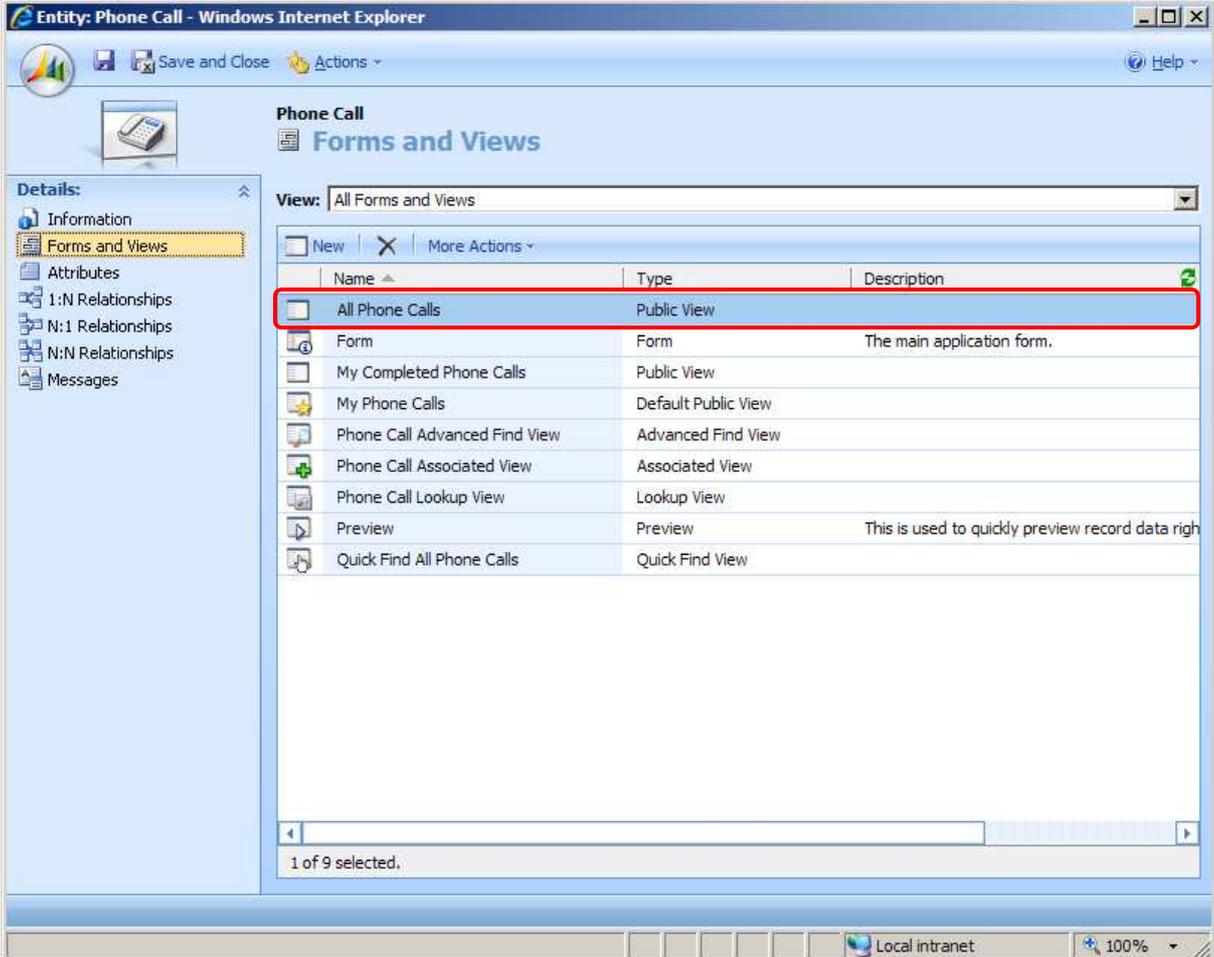
The Outboundcall-Window also uses the Search-Fields.

3 Changing OnLoad Event

To Change this Event by Hand you have to open the Entity Phone Call.



Switch to Forms and Views and open the Main Form.

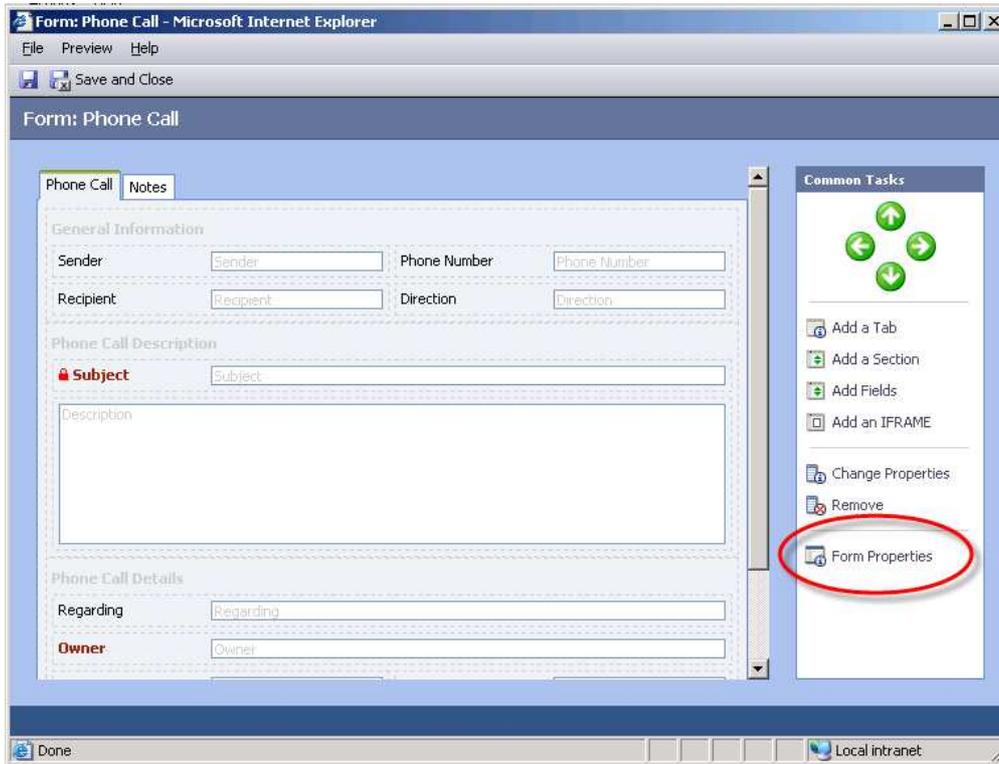


The screenshot shows the 'Entity: Phone Call - Windows Internet Explorer' interface. The main area displays the 'Forms and Views' section for the 'Phone Call' entity. A table lists various forms and views, with the 'All Phone Calls' form highlighted by a red box. The table has columns for Name, Type, and Description.

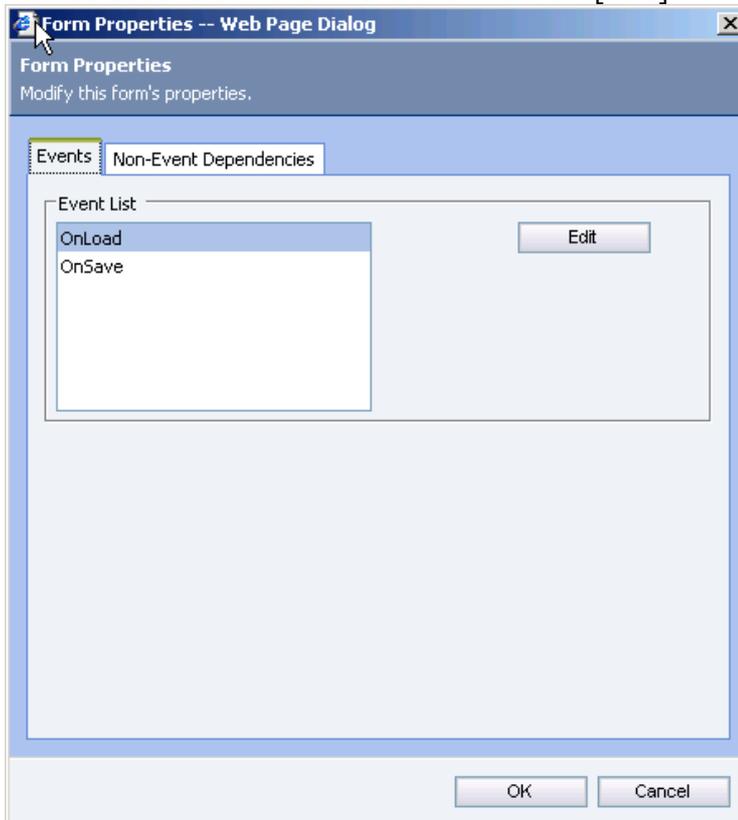
Name	Type	Description
All Phone Calls	Public View	
Form	Form	The main application form.
My Completed Phone Calls	Public View	
My Phone Calls	Default Public View	
Phone Call Advanced Find View	Advanced Find View	
Phone Call Associated View	Associated View	
Phone Call Lookup View	Lookup View	
Preview	Preview	This is used to quickly preview record data right
Quick Find All Phone Calls	Quick Find View	

1 of 9 selected.

Click on Form Properties

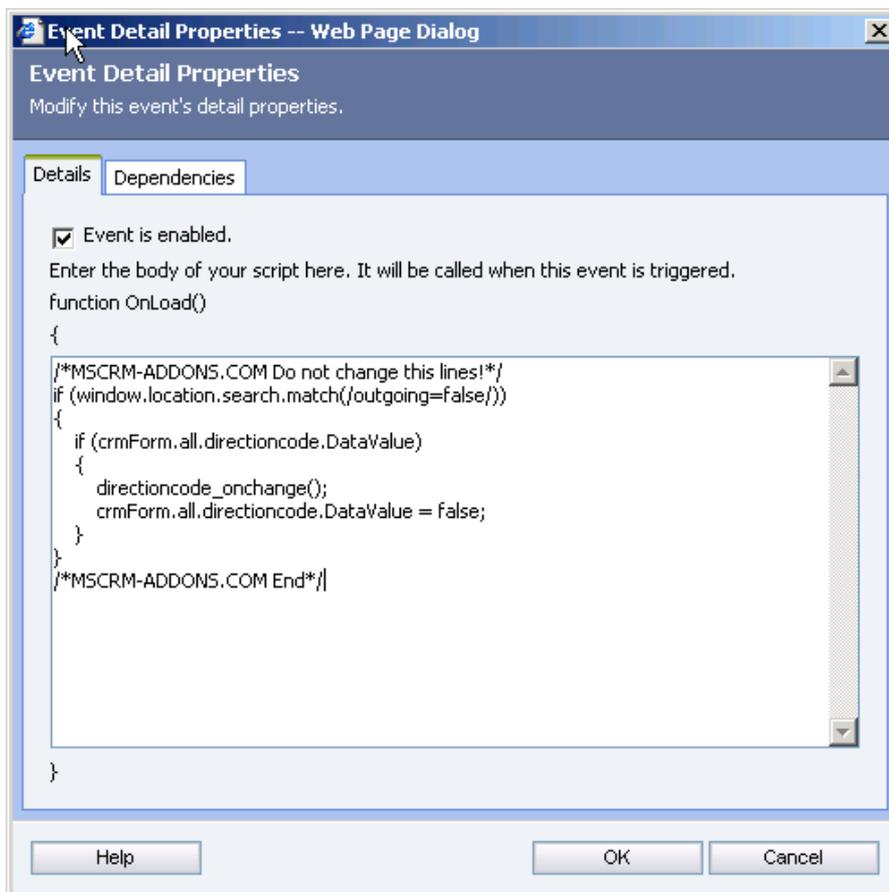


Now select the OnLoad Event and Press on [Edit]



Enable this Event and add the following Lines:

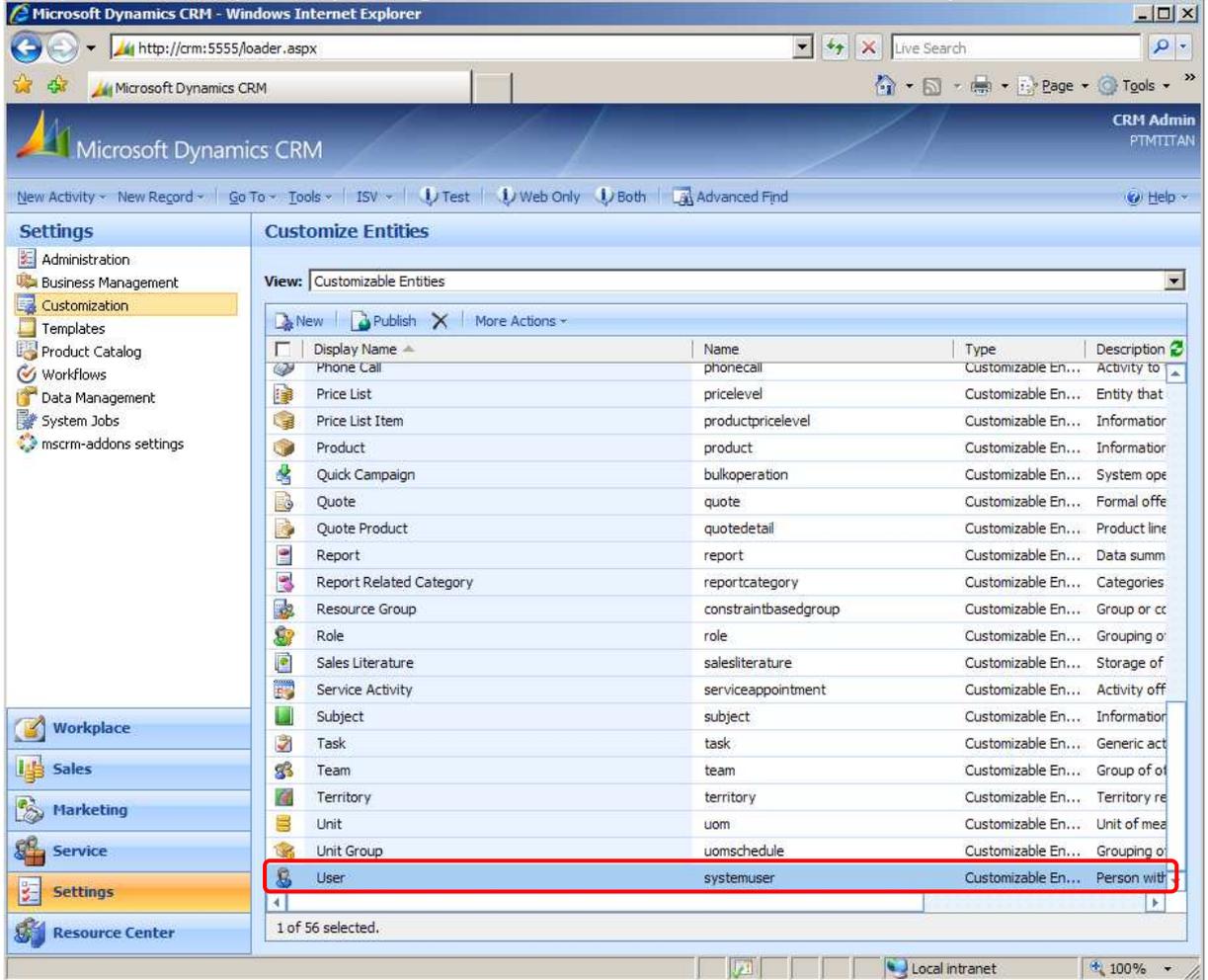
```
/*MSCRM-ADDONS.COM Do not change this lines!*/  
if (window.location.search.match(/outgoing=false/))  
{  
    if (crmForm.all.directioncode.DataValue)  
    {  
        directioncode_onchange();  
        crmForm.all.directioncode.DataValue = false;  
    }  
}  
/*MSCRM-ADDONS.COM End*/
```



4 Per User licensing

If you want to use the Per User Licensing you have to add a new Attribute to the User-Entity. Afterwards you can set up which user will be able to use TI.

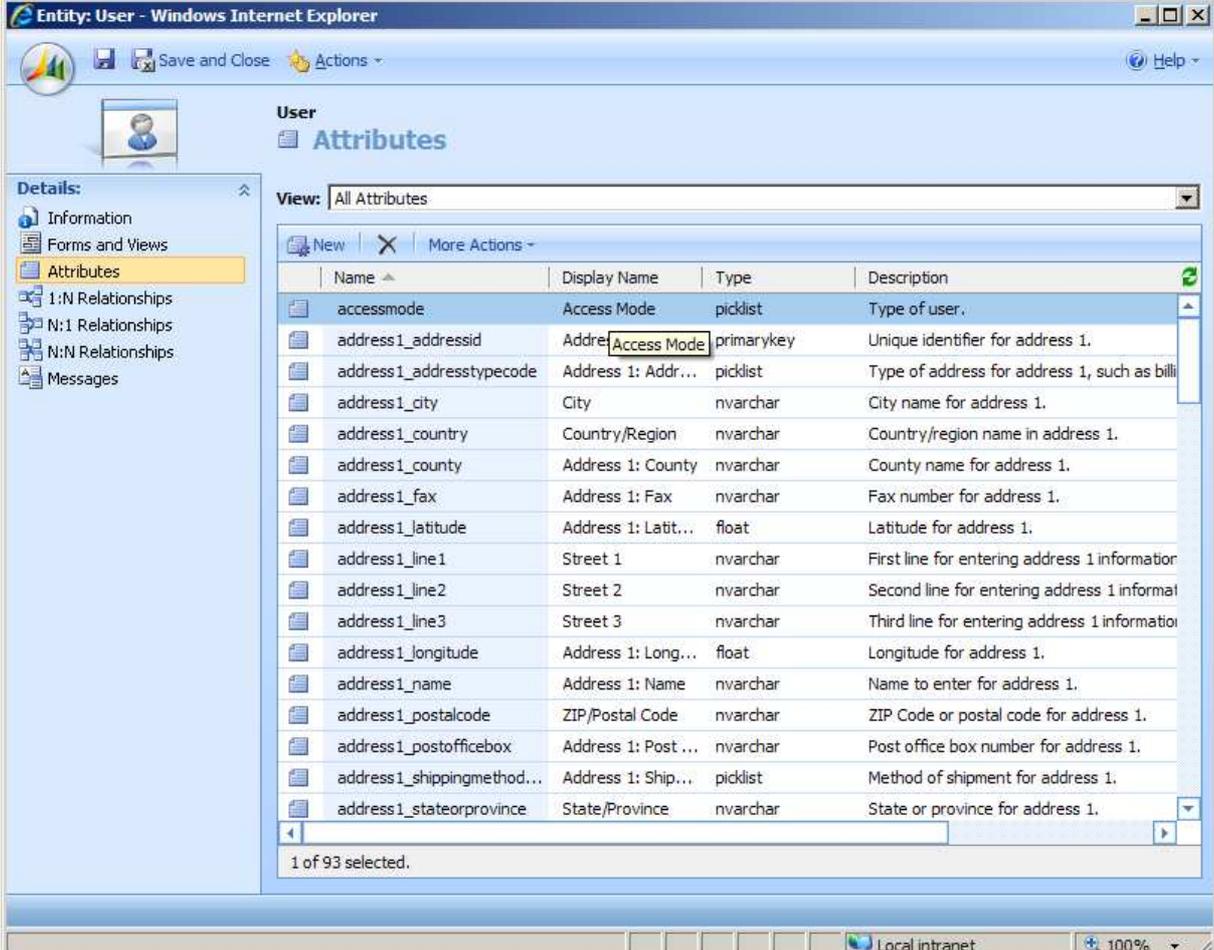
1. Open the Entity User (Settings – Customization – Customize Entities)



The screenshot shows the Microsoft Dynamics CRM 'Customize Entities' interface. The left sidebar contains navigation options: Settings (Administration, Business Management, Customization, Templates, Product Catalog, Workflows, Data Management, System Jobs, mscrm-addons settings), Workplace, Sales, Marketing, Service, Settings, and Resource Center. The main area displays a table of customizable entities. The 'User' entity is highlighted with a red box.

Display Name	Name	Type	Description
Phone Call	phonecall	Customizable En...	Activity to
Price List	pricelevel	Customizable En...	Entity that
Price List Item	productpricelevel	Customizable En...	Information
Product	product	Customizable En...	Information
Quick Campaign	bulkoperation	Customizable En...	System ope
Quote	quote	Customizable En...	Formal offe
Quote Product	quotedetail	Customizable En...	Product line
Report	report	Customizable En...	Data summ
Report Related Category	reportcategory	Customizable En...	Categories
Resource Group	constraintbasedgroup	Customizable En...	Group or cc
Role	role	Customizable En...	Grouping o
Sales Literature	salesliterature	Customizable En...	Storage of
Service Activity	serviceappointment	Customizable En...	Activity off
Subject	subject	Customizable En...	Information
Task	task	Customizable En...	Generic act
Team	team	Customizable En...	Group of of
Territory	territory	Customizable En...	Territory re
Unit	uom	Customizable En...	Unit of mea
Unit Group	uomschedule	Customizable En...	Grouping o
User	systemuser	Customizable En...	Person with

2. Click on Attributes

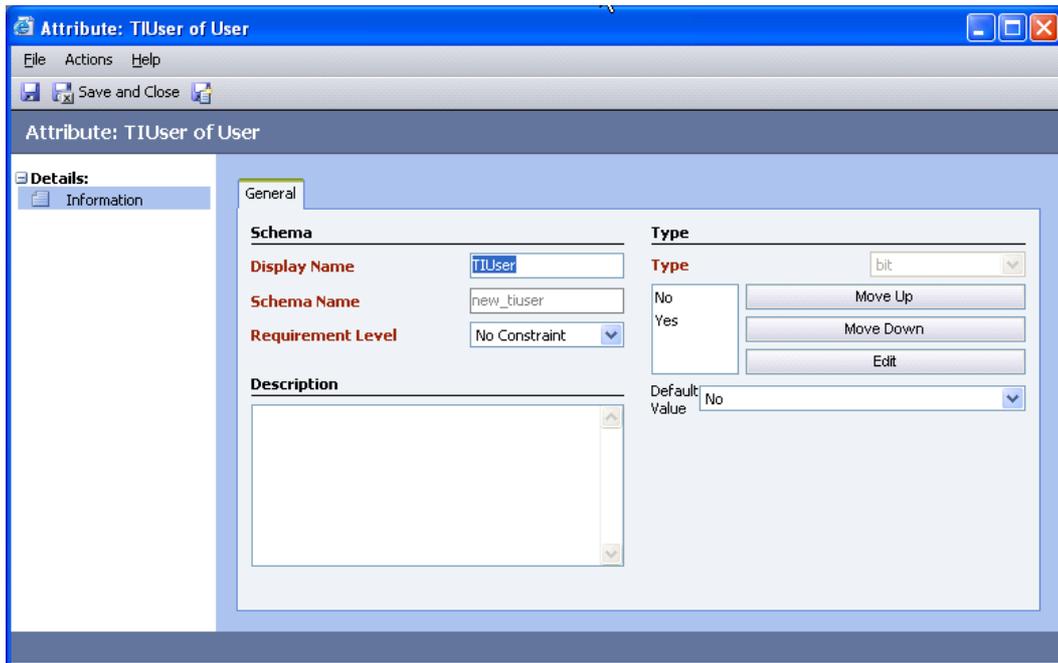


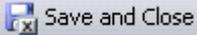
The screenshot shows the 'User' entity 'Attributes' view in Microsoft Dynamics CRM. The 'Access Mode' attribute is highlighted in the table. The table columns are Name, Display Name, Type, and Description.

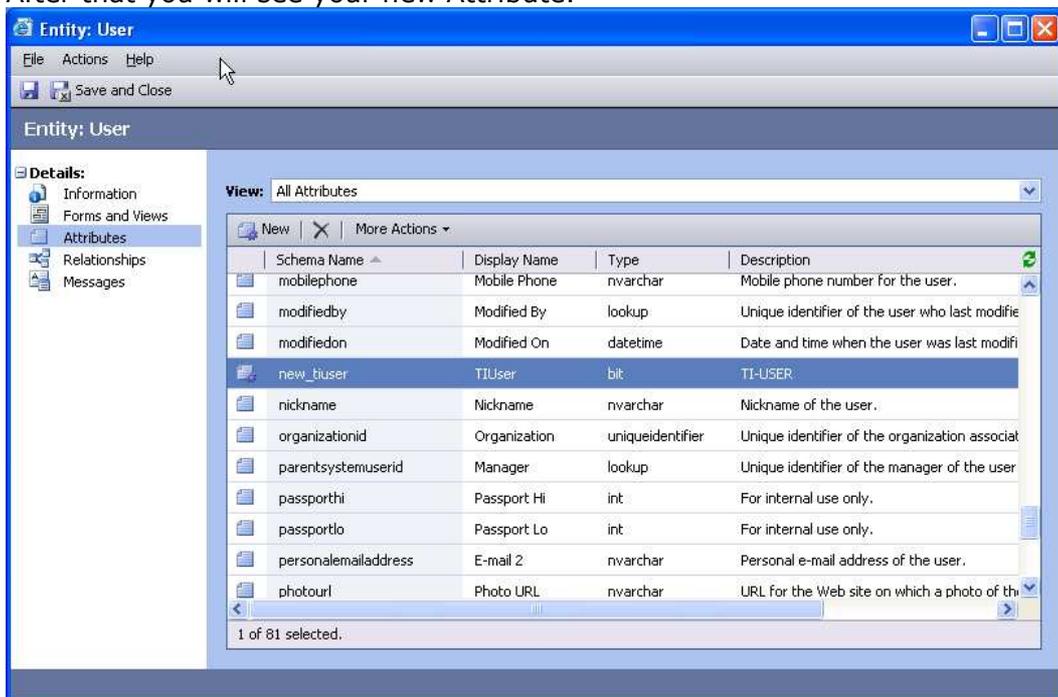
Name	Display Name	Type	Description
accessmode	Access Mode	picklist	Type of user.
address1_addressid	Address 1: Address ID	primarykey	Unique identifier for address 1.
address1_adresstypecode	Address 1: Address Type Code	picklist	Type of address for address 1, such as bill to.
address1_city	City	nvarchar	City name for address 1.
address1_country	Country/Region	nvarchar	Country/region name in address 1.
address1_county	Address 1: County	nvarchar	County name for address 1.
address1_fax	Address 1: Fax	nvarchar	Fax number for address 1.
address1_latitude	Address 1: Latitude	float	Latitude for address 1.
address1_line1	Street 1	nvarchar	First line for entering address 1 information.
address1_line2	Street 2	nvarchar	Second line for entering address 1 information.
address1_line3	Street 3	nvarchar	Third line for entering address 1 information.
address1_longitude	Address 1: Longitude	float	Longitude for address 1.
address1_name	Address 1: Name	nvarchar	Name to enter for address 1.
address1_postalcode	ZIP/Postal Code	nvarchar	ZIP Code or postal code for address 1.
address1_postofficebox	Address 1: Post Office Box	nvarchar	Post office box number for address 1.
address1_shippingmethodcode	Address 1: Shipping Method	picklist	Method of shipment for address 1.
address1_stateorprovince	State/Province	nvarchar	State or province for address 1.

3. Now add a new Attribute by clicking on 

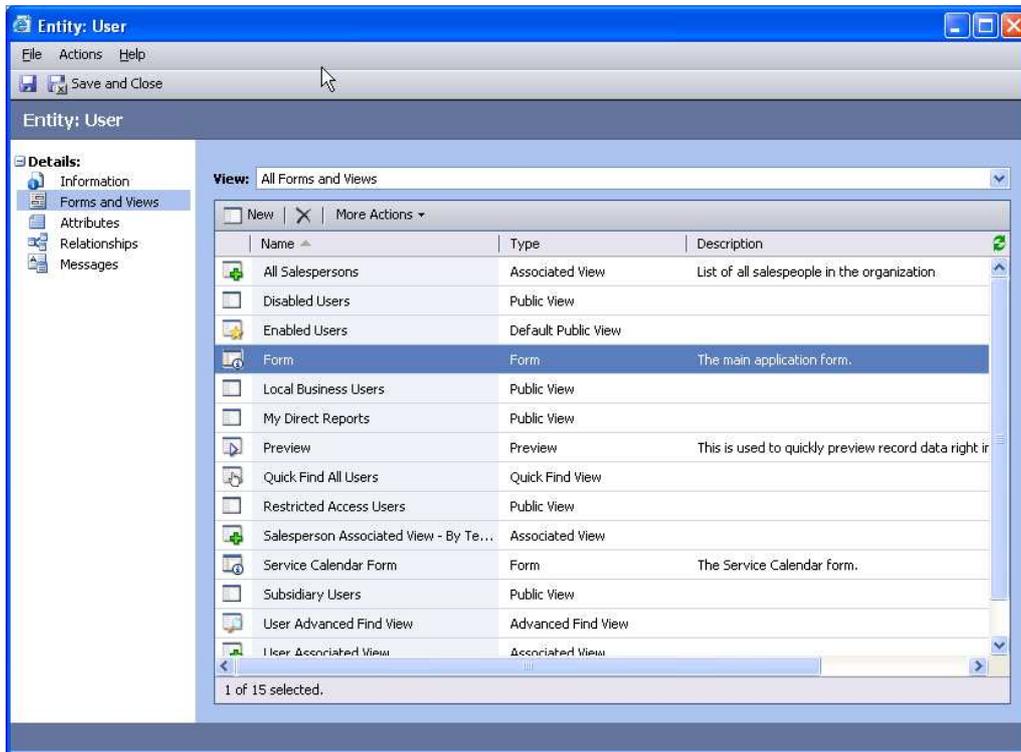
Please fill out this Form exactly as you seen on the following Screenshot.



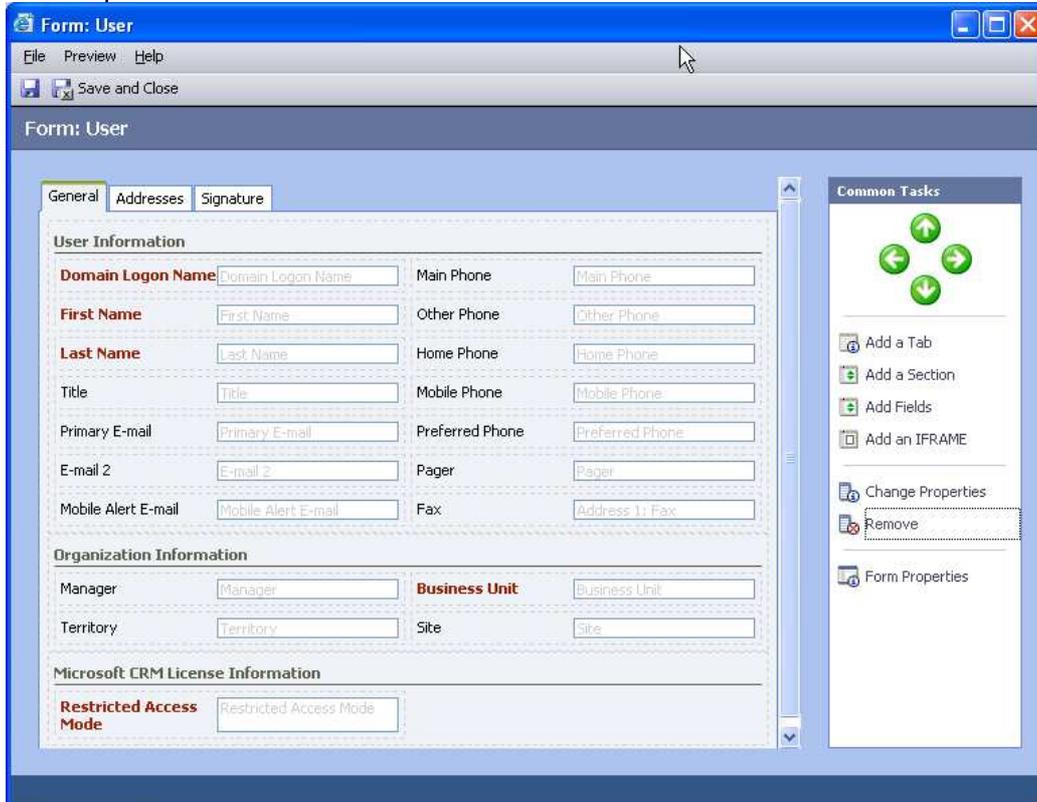
Close this window by clicking on  Save and Close
 After that you will see your new Attribute.



Change to Forms and Views...

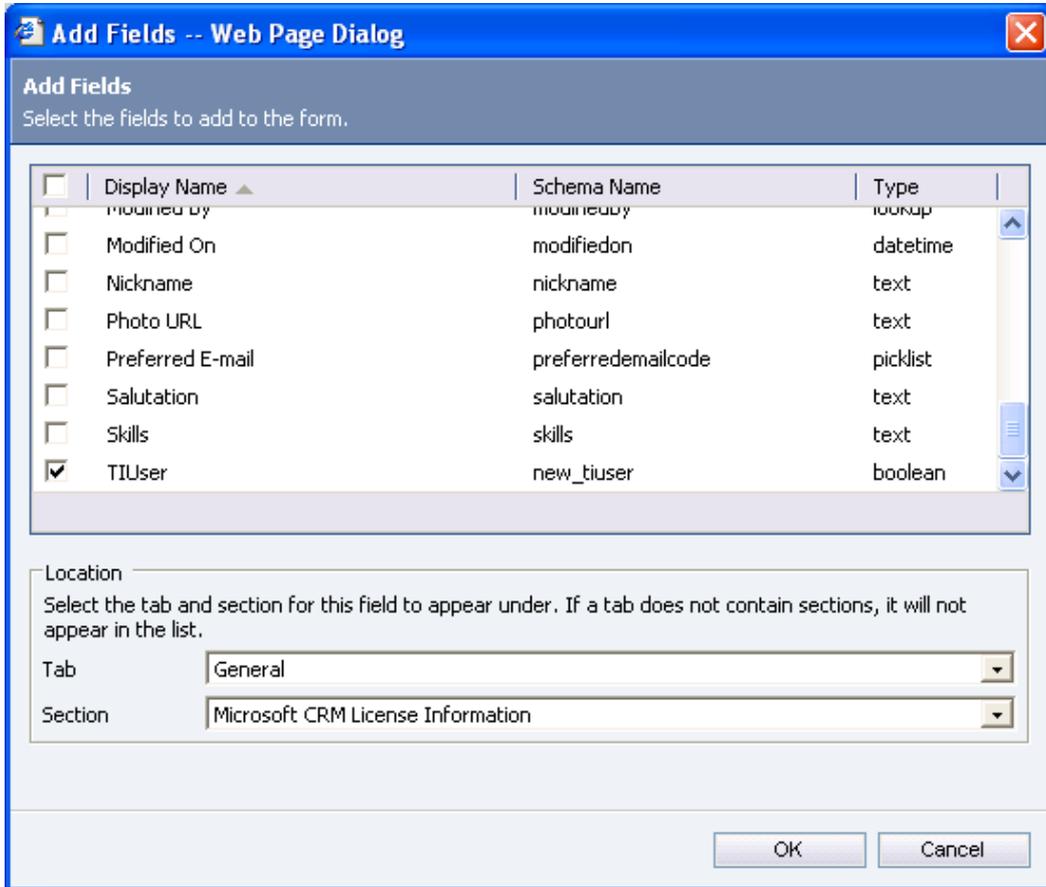


...and open the 'Main' Form.



On the right side click on  Add Fields

Scroll down to **TIUser**, check it and be sure that the Section 'Location' looks like the same as on this Screenshot.



Add Fields -- Web Page Dialog

Add Fields
Select the fields to add to the form.

<input type="checkbox"/>	Display Name ▲	Schema Name	Type
<input type="checkbox"/>	Modified By	modifiedby	lookup
<input type="checkbox"/>	Modified On	modifiedon	datetime
<input type="checkbox"/>	Nickname	nickname	text
<input type="checkbox"/>	Photo URL	photourl	text
<input type="checkbox"/>	Preferred E-mail	preferredemailcode	picklist
<input type="checkbox"/>	Salutation	salutation	text
<input type="checkbox"/>	Skills	skills	text
<input checked="" type="checkbox"/>	TIUser	new_tiuser	boolean

Location
Select the tab and section for this field to appear under. If a tab does not contain sections, it will not appear in the list.

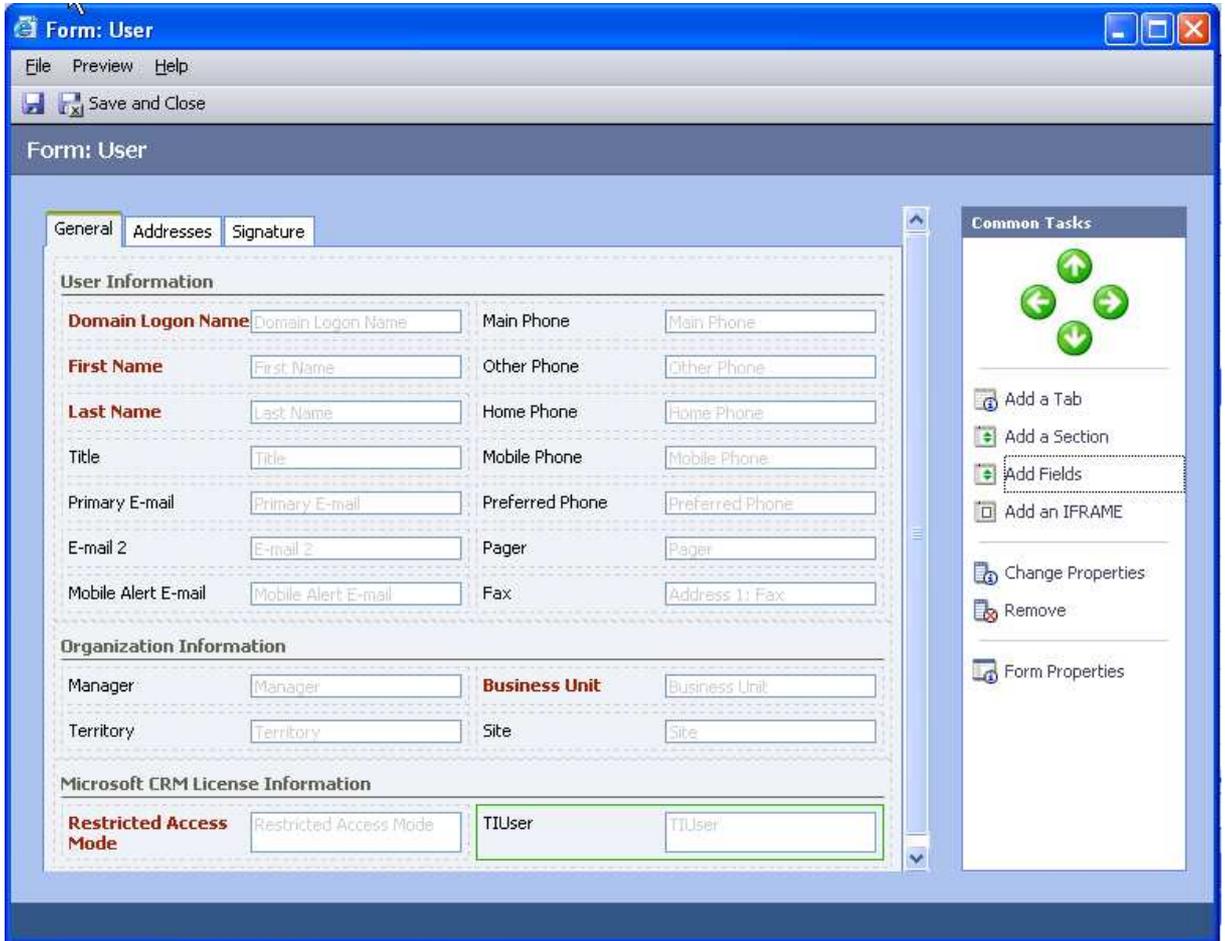
Tab:

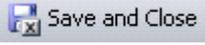
Section:

OK Cancel

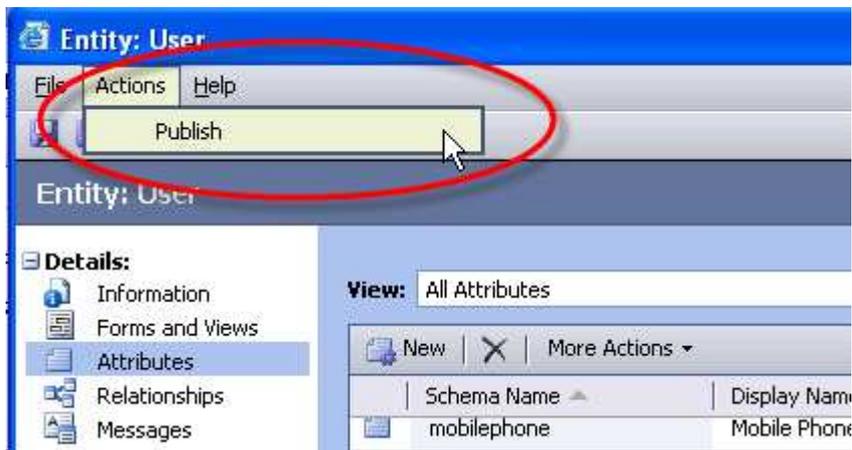
Press on [OK].

Now Your Main User Form should look like this:

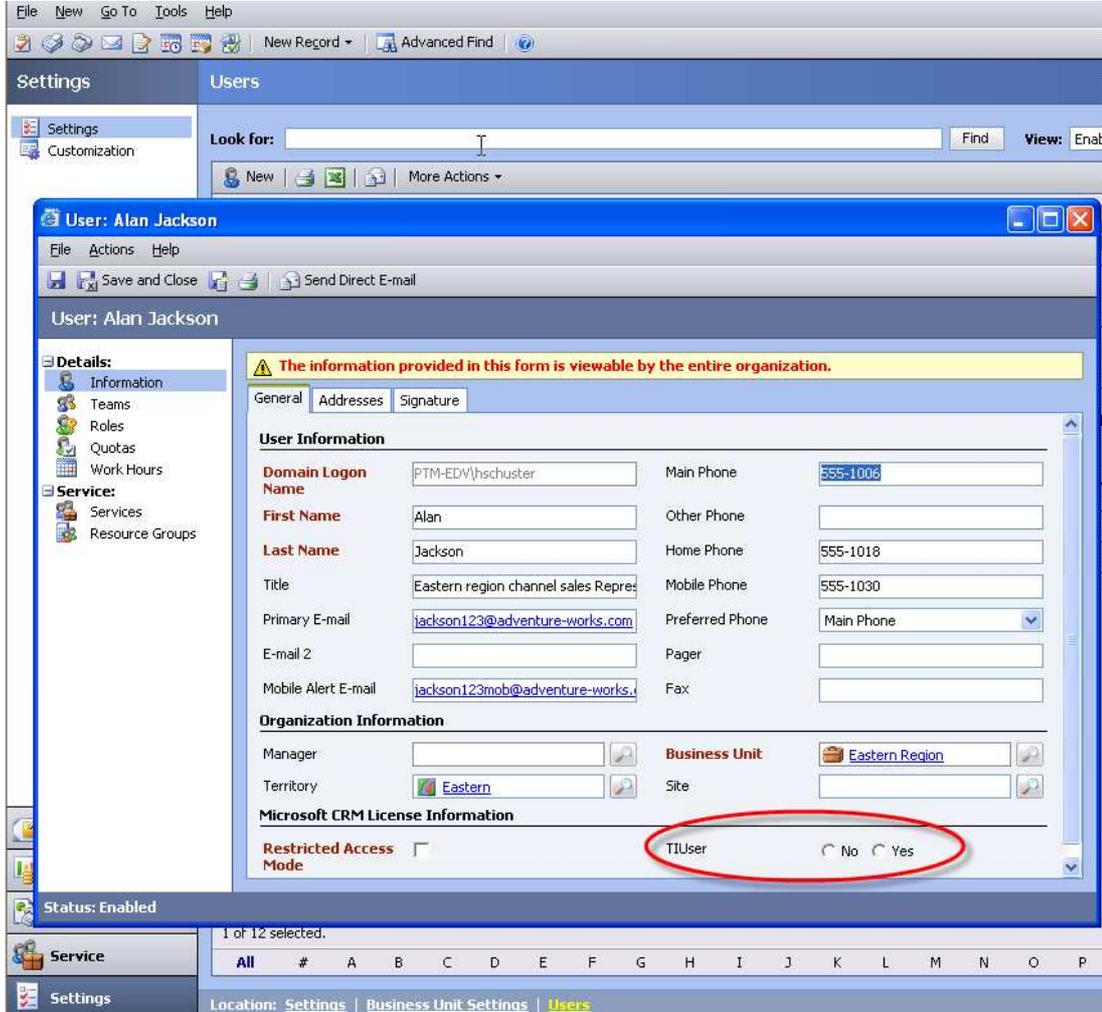


Close this window by clicking on 

To activate this new Attribute you have to Publish it.



Now you can set up which User will be able to use TI. Open the User Form (Settings – Settings – Business Unit Settings – Users) of an User you want to grant access to TI and set the new Attribute TIUser to YES.



The screenshot shows the Microsoft CRM interface for editing a user. The user is Alan Jackson. The form is divided into several sections:

- General**: Includes fields for Domain Logon Name (PTM-EDW\hschuster), Main Phone (555-1006), First Name (Alan), Last Name (Jackson), Title (Eastern region channel sales Repres), Mobile Phone (555-1030), Primary E-mail (jackson123@adventure-works.com), Preferred Phone (Main Phone), E-mail 2, Pager, Mobile Alert E-mail (jackson123mob@adventure-works.com), and Fax.
- Organization Information**: Includes Manager, Business Unit (Eastern Region), Territory (Eastern), and Site.
- Microsoft CRM License Information**: Includes Restricted Access Mode (unchecked) and the TIUser attribute, which is set to Yes and circled in red.

The status of the user is Enabled. The bottom of the screen shows a navigation pane with Service and Settings, and a list of users with columns All, #, A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P.

5 Contact

If you have problems with the installation send a Email to support@mscrm-addons.com or call +43 316 680 880 0