



# Telephone Integration for Microsoft CRM 3.0 (TI for MS CRM 3) Client

Version 2.40.0

## **How To Install Guide**

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# Table of Contents

<b>1 INSTALLING OF TI FOR MS CRM 3 .....</b>	<b>3</b>
1.1    VERIFY PHONE AND MODEM OPTIONS .....	3
1.2    LOCAL LOOP NUMBER .....	3
1.3    REMOVE THIS COUNTRY-CODE AND AREA-CODE.....	4
<b>2 TI FOR MS CRM 3 SETUP .....</b>	<b>4</b>
2.1    STARTING THE CLIENT .....	12
2.2    CLOSING THE CLIENT .....	13
2.3    CONFIGURATION OF THE CLIENTS .....	13
<b>3 CONTACT .....</b>	<b>13</b>

## 1 Installing of TI for MS CRM 3

Before installing **TI**, please read this document and follow the steps carefully.

The installation consists of the following steps:

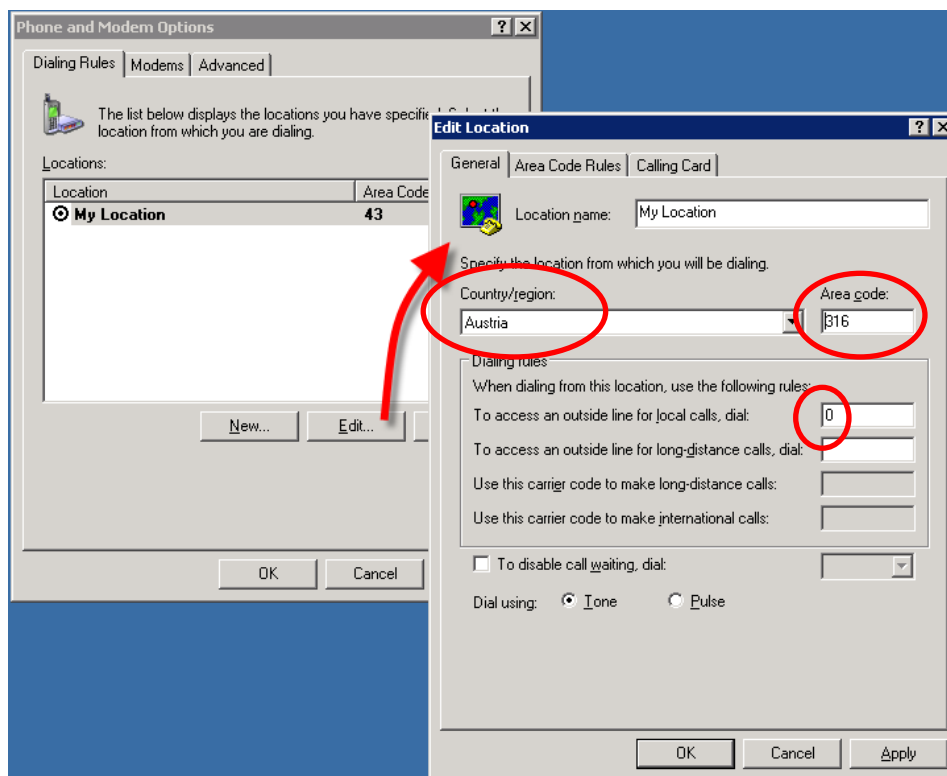
Follow each of the following steps, to complete the installation:

1. Remove all old Installations. ("TI TAPI CallOut" and "TI for MS CRM 3")
2. Installing TI for MS CRM 3
3. Configuring the Client

### 1.1 Verify Phone and modem options

You will find this under <Control Panel> <Phone and Modem Options>

Select your Location and press [Edit...]



### 1.2 Local Loop Number

In most Telephone-Systems you have to enter a Local Loop Number to get a line. If this is the case, you will have to enter this number here.

### 1.3 Remove this Country-Code and Area-Code

This is a special case. Telephone-Systems don't like it when you try to call in your own Country with your own Country-Code. That means if you are in Austria (Country-Code is 0043), you cannot call someone in Austria with 0043 at the beginning. This is also necessary for the Area-Code.

Example for Austria:

You stored the telephone number with e.g. +43 316 680 880 in CRM.

CallInfo4CRM replaces the + to 00.

New Number to call: 0043316680880.

If you live outside Austria it will work now, but in Austria it won't.

So TAPI CallOut removes this Country-Code and replaces it with an 0.

Correct Working Number: 0316680880

If your Area-Code is 0316 (or 316) it also will be removed.

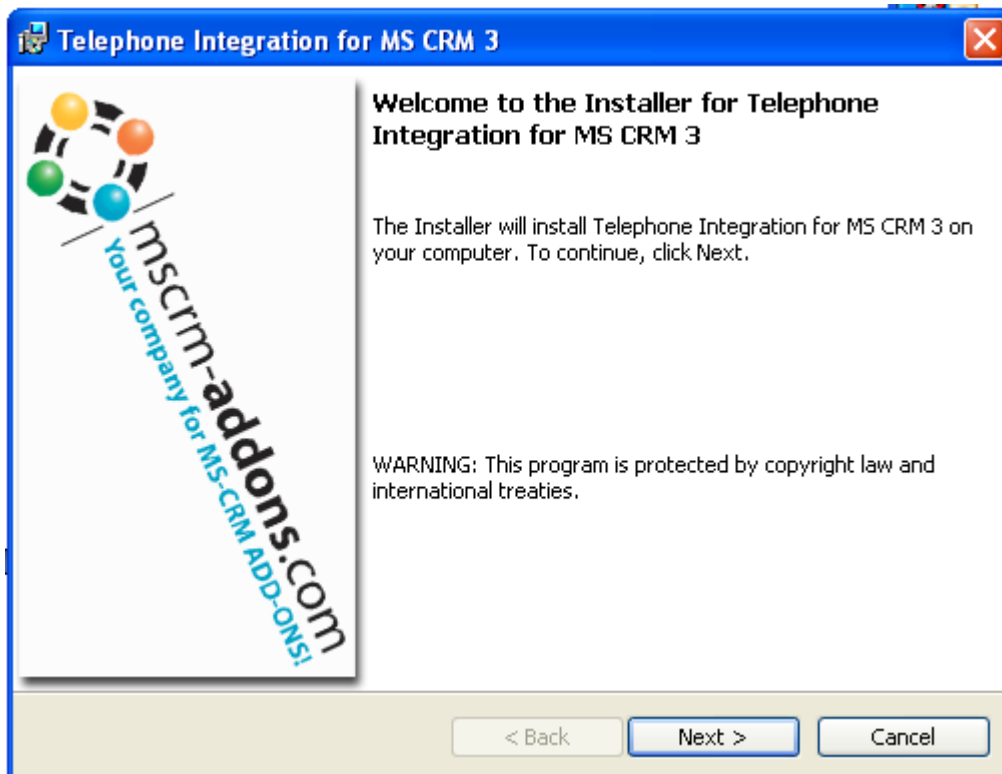
Correct Working Number: 680880

If you set an Local Loop Number (e.g. 0) TAPI CallOut will send 00316680880 (or 0680880) to your Phone.

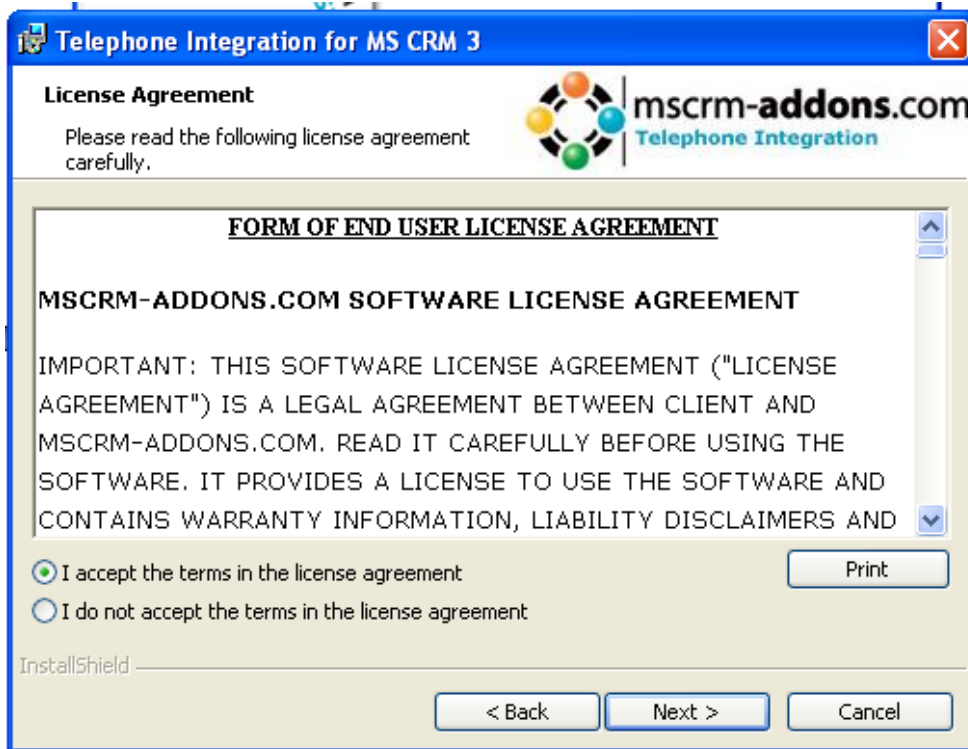
## 2 TI for MS CRM 3 Setup

Now Telephone Integration setup starts.

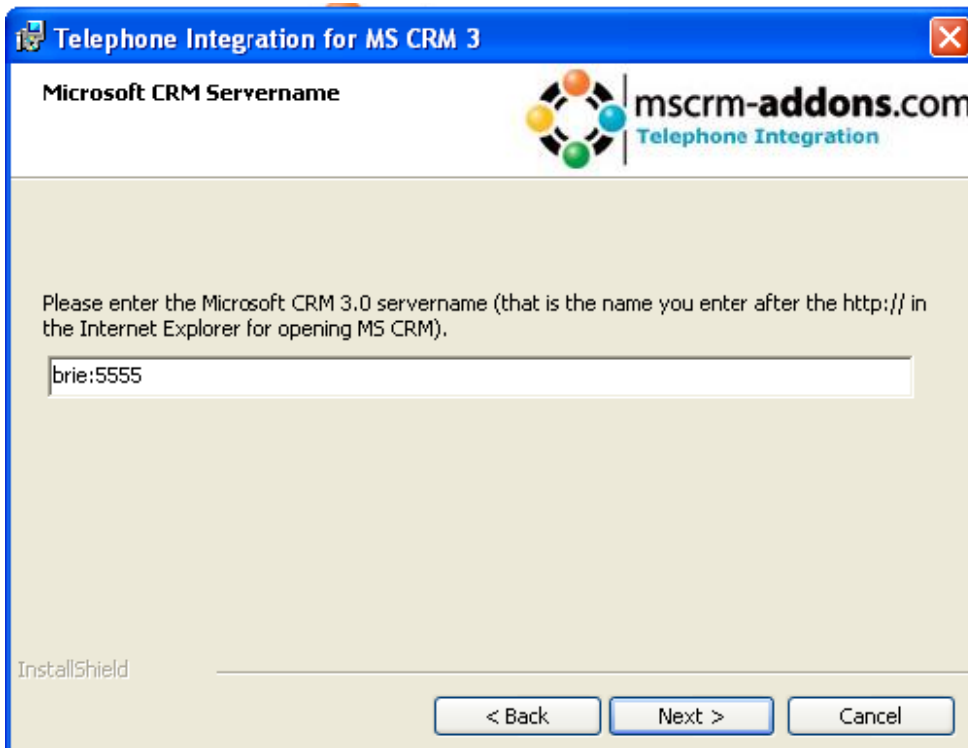
1. You will see following window:



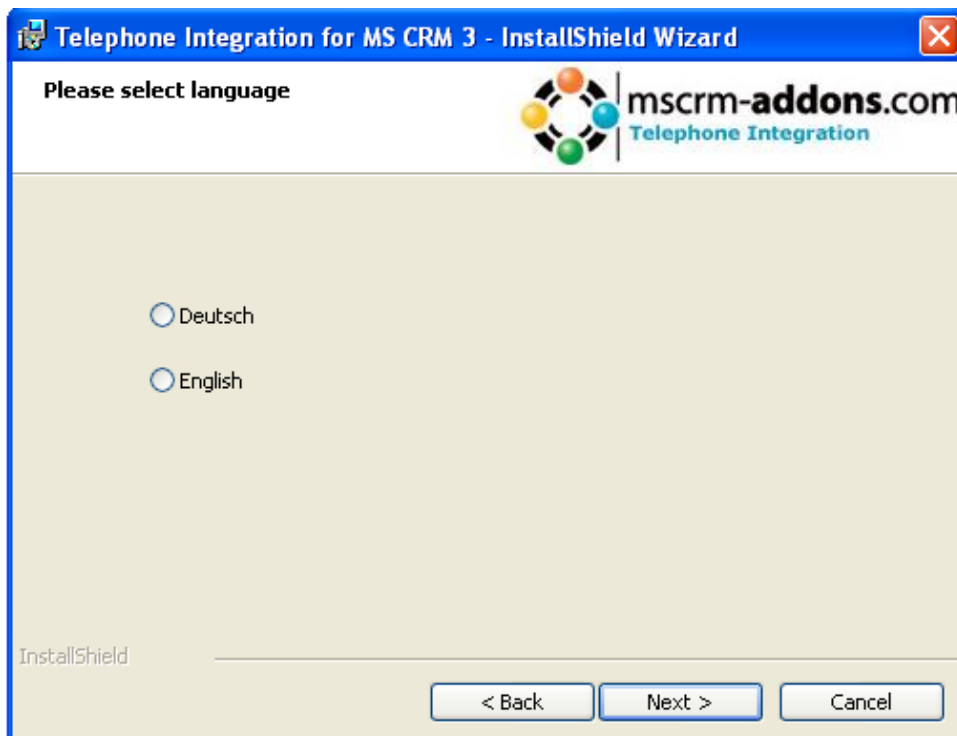
2. Now you have to accept the License Agreement.



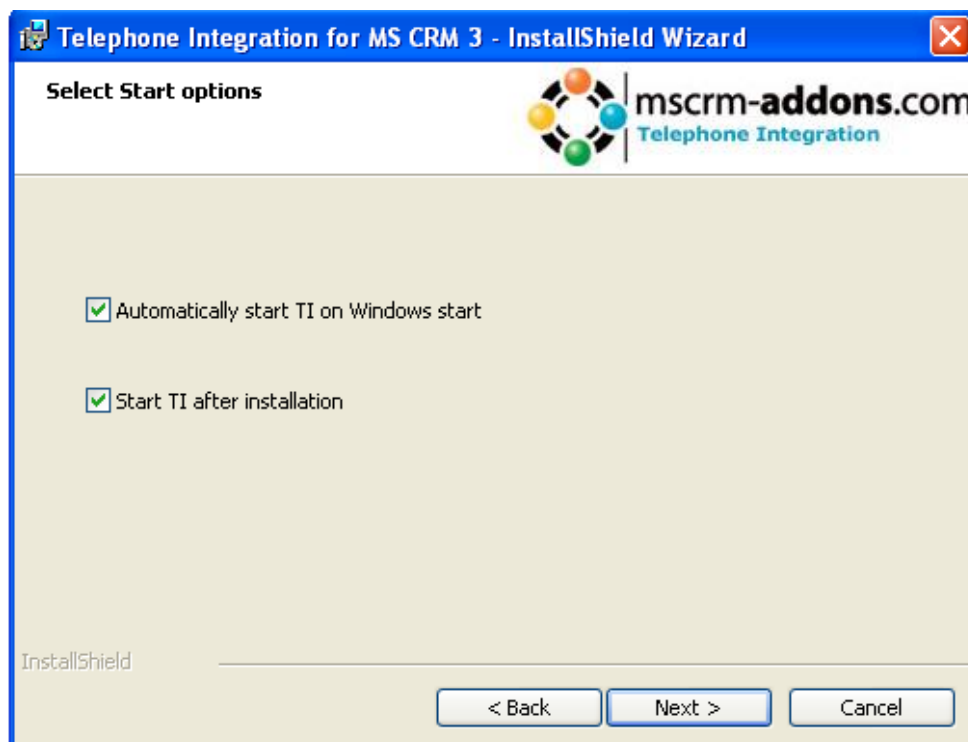
3. The next step is to type in servername:port of your CRM.



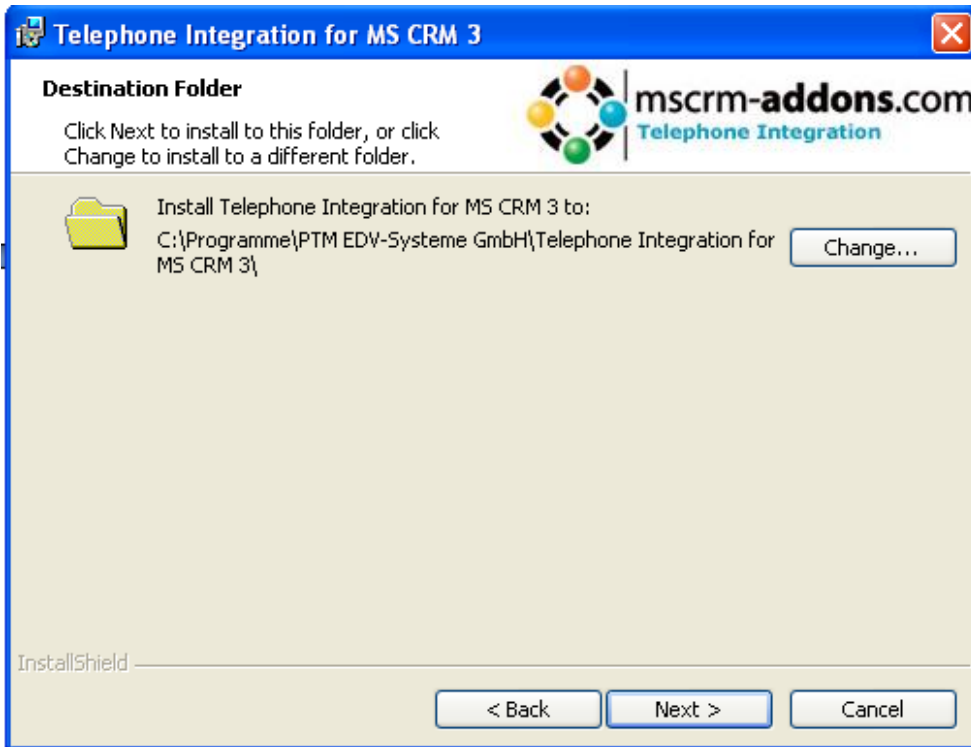
4. In the next window you can choose a language.



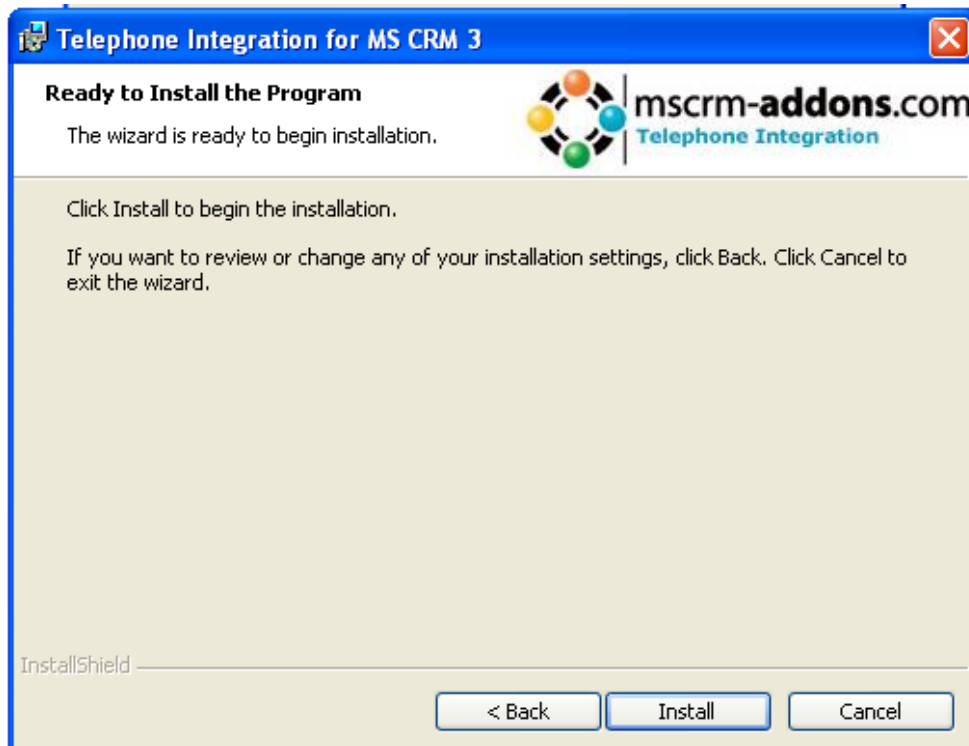
5. Now you have the possibility to select your Start options.



6. You can select the folder where you want to install CallInfo4CRM. If you agree with this pre settings select <Next>.



7. All installation settings are done. Click <Install> to start the installation.

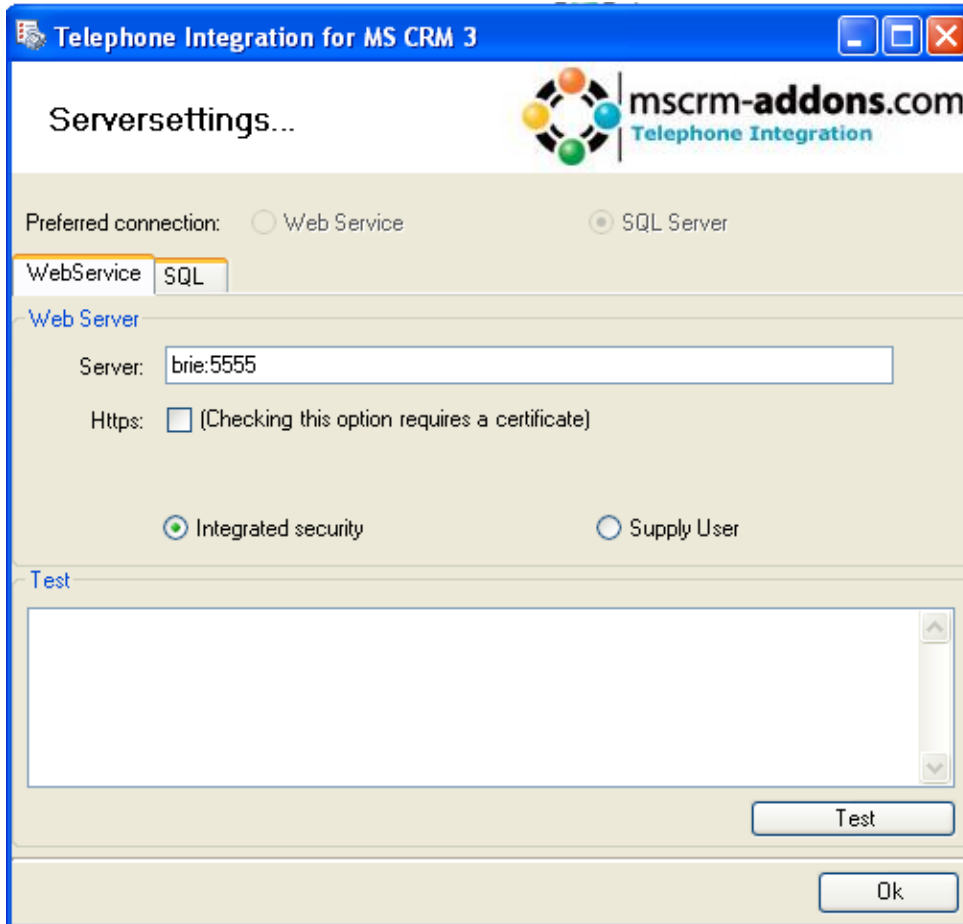


## 8. Server settings...

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.

### 8.1. Web Service



The screenshot shows the 'Serversettings...' dialog box for 'Telephone Integration for MS CRM 3'. The 'Preferred connection' section has 'SQL Server' selected. The 'WebService' tab is active, showing the 'Server' field with the value 'brie:5555' and the 'Https' checkbox unchecked. The 'Integrated security' radio button is selected. A 'Test' button is located at the bottom right of the dialog.

**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 brie and CRM-port is 5555

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

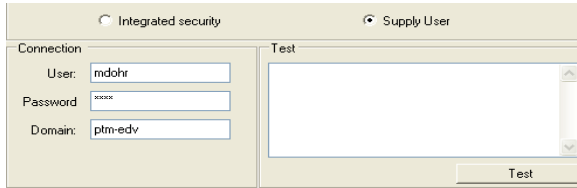
you can test the connection with a click on "Test".

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

**Integrated security:** Check this radiobutton to logon with your local credentials.

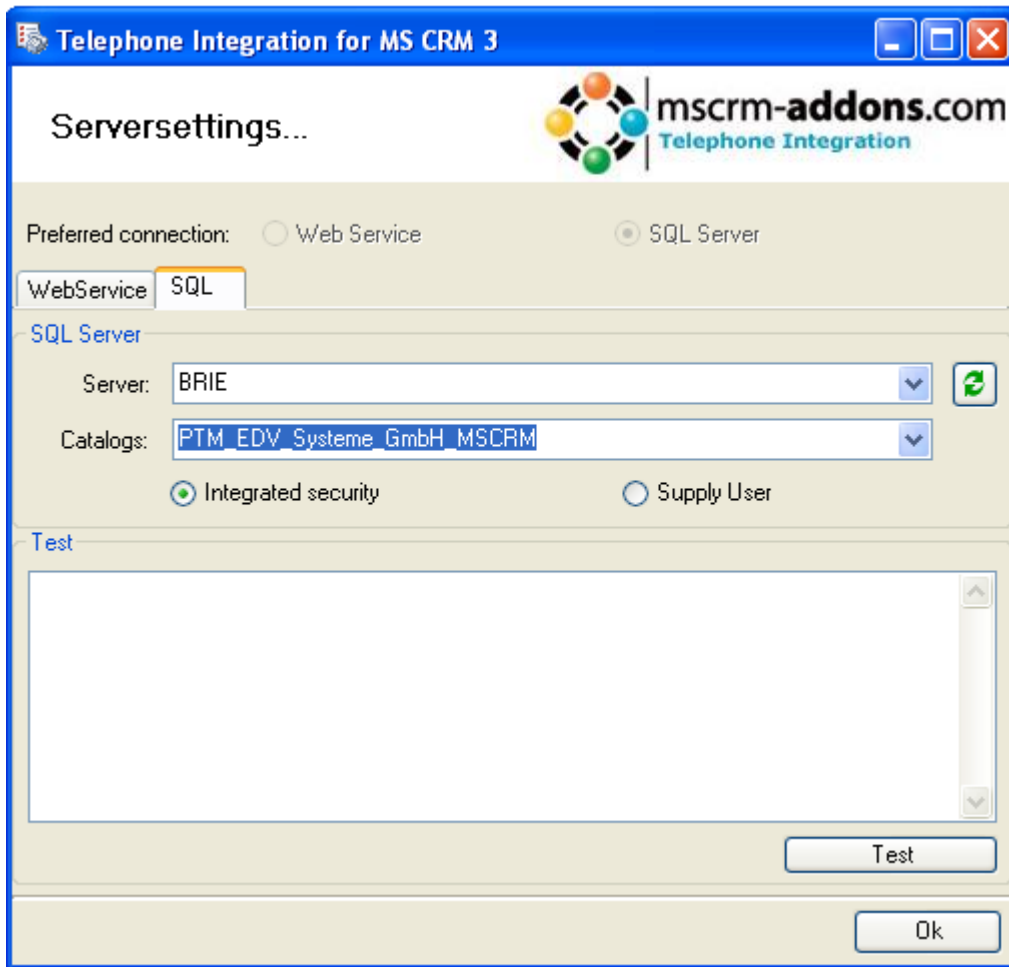


**Supply User:** Check if you want to supply a specific user. In this case you'll have to enter username, password and domain of the user.



The screenshot shows a dialog box with two radio buttons at the top: "Integrated security" (unselected) and "Supply User" (selected). Below the radio buttons, there are three text input fields under the heading "Connection": "User:" containing "mdohr", "Password:" containing "secret", and "Domain:" containing "plm-edv". To the right of these fields is a large empty text area under the heading "Test". At the bottom right of the dialog box is a "Test" button.

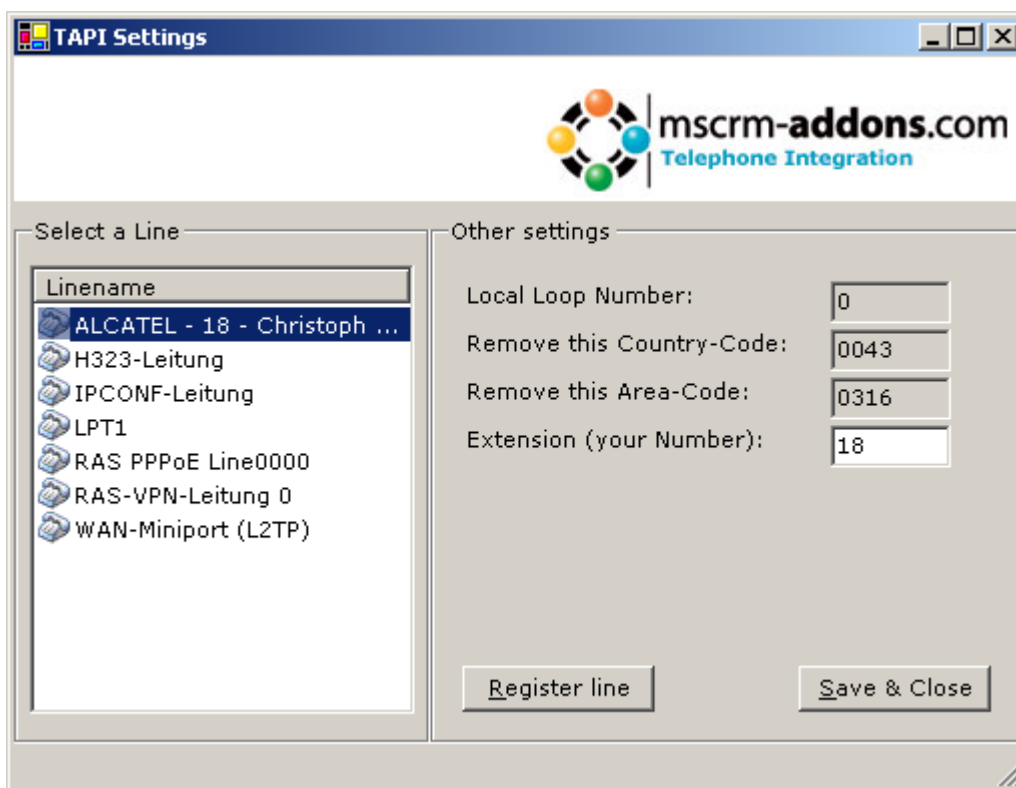
## 8.2 SQL Server



**Server:** choose the SQL server where the MSCRM – Database is running.

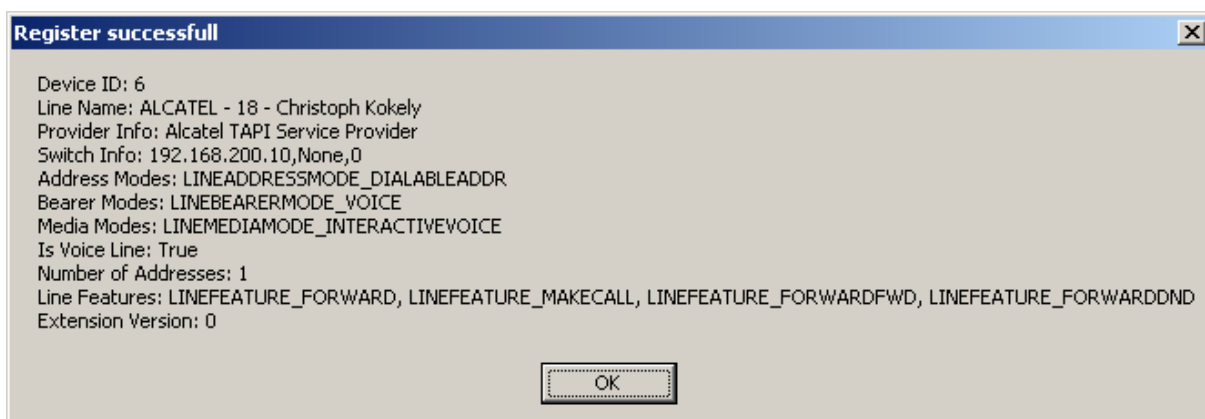
**Catalogs:** choose the MSCRM-catalogue. E.g PTM\_EDV\_Systeme\_GmbH\_MSCRM  
Again you've got the possibility to logon with your local credentials (Integrated security) or to supply a specific user. (see 8.1)

## 9. Basic TAPI Setup



Select the line you want to use and enter the extension number in the field "Extension (your Number)".

Now hit register line to check, if the line can be registered. On success a window like the following will pop up.

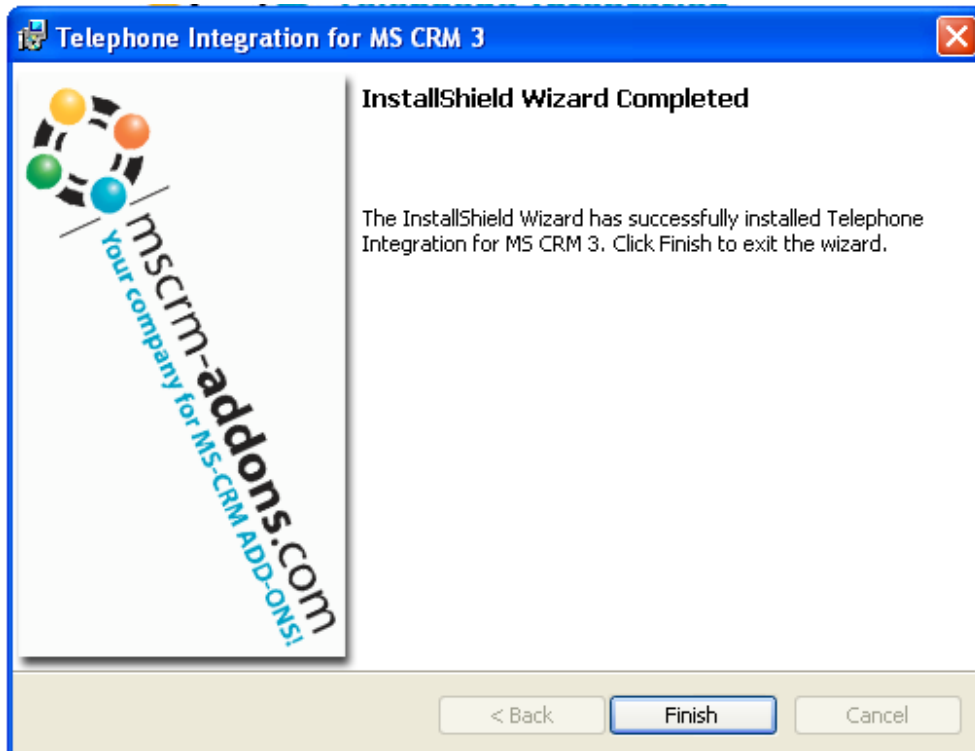


Close the "Register successful" window and hit "Save & Close" to continue.

10. Set up TI for MS CRM 3

To do further customizations see the users guide for TI for MS CRM 3

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



If you selected "Start TI for MS CRM 3 after installation" now TI for MS CRM 3 starts.

## 2.1 Starting the Client

After successful Installation you should find a new Menu-entry

*PTM EDV-Systeme - Telephone Integration for MS CRM 3 - TI for MS CRM 3*

Click on it and TI for MS CRM 3 starts.

You will only see a little Icon in the right of the Menu-Bar.

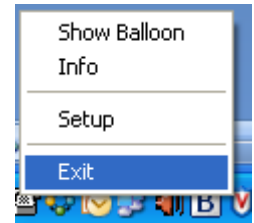


After a few seconds the red cross appears and TI for MS CRM 3 is ready!



## 2.2 *Closing the Client*

Click with the right mouse button on the Icon and a little menu will appear – click on [Exit].



## 2.3 *Configuration of the clients*

After installation you can always change the configuration of CallInfo4CRM.

Click the right mouse button on the Icon and select [Setup] (see 3.2).

To activate new serverside settings for CallInfo4CRM please restart CallInfo4CRM.

## 2.4 *Enabling simple Balloon*

To enable the simple display for a specific user navigate to the registry to HKCU\Software\PTM EDV-Systeme\CallInfo4CRM.

Create a new string value called "useSimpleBalloon" with the value "true".

This will enable the simple balloon display.

If you want this setting for all users on this use the HKLM\Software\PTM EDV-Systeme\CallInfo4CRM registry key.

## 3 **Contact**

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